# Stakeholder Interactions in Learning City Projects

**An investigation into good-case project practice and stakeholder interaction of institutional learning space development and urban planning for education-centered urban development**

**Bachelor Thesis in the Degree Program**

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submitted by

**Stefan Volkmann**

Matr.-No.: 24799

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First Examiner: Prof. Dr. Richard Stang

Second Examiner: Dorte Skot-Hansen

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# Abstract

Innovative architecture and networks for learner-centred, local education and life-long-learning are receiving growing attention. Yet, practitioners still require practical guidance, given the challenge of involving and interacting with new and diverse stakeholder groups, such as architects and politicians, or the community at large. With the goal of advancing scientific and practical frameworks, this thesis approaches how stakeholders in 'education-centred urban development' (ECUD) can be helped to accomplish mutual understanding and more effective communication and interaction during planning.

Assuming the organizational theory of 'networked governance' (NG), a literature review is conducted across 'institutional learning space development' (ILSD) and the 'learning city / region' discourse (LCR), in order to discuss stakeholder involvement in planning. Six key themes are summarized and tested against a case study of 'Hume Global Learning Village' (HGLV), Australia, using a document analysis and expert online interviews.

The review finds the following themes: First, the concepts of ILSD and ECUD can be very abstract to comprehend, and stakeholders' varied understandings of 'learning' demands an open, continuous dialogue. Next, individual leadership needs to initiate a vision, and multiply buy-in and followers. Securing sustainable funding sources is a precondition to foster participation and commitment. Long-standing organizational 'silo-thinking' has to be opened up towards cultures of sharing, collaboration, and innovation. Facilitation capacities are crucial to provide an inclusive planning process where consent and commitment is fostered. Lastly, change and positive learning effects may take a long time to show – this expectation has to be internalized by all stakeholders.

Despite few optimal interview sources, the case study confirms the themes, and illustrates that excess leadership can ensure the other conditions. This suggests that the six themes can serve as a framework for practitioners to conduct successful stakeholder involvement in planning. However, they are not unique among good-case literature. Moreover, the review shows a literature gap in how a suitable degree of stakeholder involvement can be selected. It is recommended to consolidate the various, alternative planning processes and models, and further triangulate local experiences, in order to close this gap and derive more comprehensive and universal tools for practitioners.

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# List of Abbreviations

| Abbreviation | Explanation |
|---|---|
| ILSD | Institutional learning space development |
| ECUD | Education-centered urban development[1] |
| NG | Networked governance |
| LCR | Learning city / learning region[2] |
| KC | Knowledge city[3] |
| HGLV | Hume Global Learning Village |
| HGLC | Hume Global Learning Center |
| LEL | Local education landscape[4] |
| LO | Learning organization[5] |

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[1] ECUD is used as an *umbrella-term* for other education-centred urban development concepts, like LCRs, KCs, or creative cities (LANDRY 2008; FLORIDA 2003), smart cities (CAMPBELL 2012), sustainable cities, etc. As LONGWORTH illustrates, the most central ECUD model of this thesis, LCRs, subsumes the vast variety of other ECUD concepts [2014b].

[2] "'*Learning communities are an approach to describe how places respond to emerging challenges by bringing key organisations and people together to learn how to invent new responses to challenges their communities face*'" (WILSON in WHEELER, WONG 2013, p. 3).

"[…] *the rationale for wanting to become a learning city may principally be economic, social or environmental, but usually contains elements of each stimulus*" (JORDAN et al. 2014, p. 274)

"*The learning city and the learning region are now often used interchangeably, and in more recent work of the OECD (2001), it is the regional dimension that is emphasized.*" (SANKEY, OSBORNE 2006, p. 203)

[3] "[…] *a city following the KC concept embarks on a strategic mission to firmly encourage and nurture locally focussed innovation, science and creativity within the context of an expanding knowledge economy and society. In this regard a KC can be seen as an integrated city, which physically and institutionally combines the functions of a science park with civic and residential functions. It offers one of the effective paradigms for the sustainable cities of the future*" (YIGITCANLAR et al. 2008, pp. 63–65).

[4] 'Local education landscape' is a generic term to refer to regional education infrastructure, encompassing formal, nonformal and informal education institutions and actors, services, and environments Tippelt 2015, p. 21.

[5] The term refers to a change in organizational structure and culture, which empowers staff, makes the organization quicker to react to external stimuli, and allows them to incorporate the public better.

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# 1 Introduction

During the recent decades, education institutions' emphasis on their *physical space* as an environment to *boost learning* has seen a worldwide increase of interest and focus. Traditional, unconsidered educational environments have been discovered to limit the possibility of applying novel pedagogies and spark independent learning. However, to realize *lifelong learning* – the idea of a continuous demand for learning and self-development throughout all stages of life –, teaching and learning methods have to be geared flexibly to the *learners* needs, and not to the conditions of their given environment. Thus, a trend towards physical and hybrid learning spaces has emerged, in which education institutions and learning environments are restructured to suit learning preferences in an attractive, flexible, and technology-supportive design[6].

As a student research assistant, this phenomenon of *institutional learning space development* (ILSD) has been studied by the author extensively throughout the last two years. The work aimed at structuring the global trends and resulted in the creation of an international research database on the topic (VOLKMANN, STANG 2015; VOLKMANN 2015c). Based on this research, a recent observable tendency illustrates a phenomenon of but another magnitude: The physical and organizational changes inside education institutions and between them increasingly appear in the environments *among and beyond* the institutions, namely, *in the city or the region* (HARRISON, HUTTON 2014; CITY OF HELSIKI 2008; GULSON, SYMES 2007; HAAR 2011; WILDEMEERSCH 2012; TIPPELT 2015; COELEN et al. 2015):

Schools of any type have been strongly focusing on renewing their physical spaces for more than a decade (AKINSANMI 2013; HEPPEL 2013, p. 244), and are now more and more commonly planned and designed not as individual, isolated institutions, but as parts, connectors, or even *revitalizers* of communities (BAUMHEIER, WARSEWA 2010; HARRISON, HUTTON 2014; CHILES, CARE 2015; CHAPMAN, ASPIN 2012). Furthermore, universities begin to see themselves not only as providers of learning spaces and support to *students*, but also to its surrounding region and its population (BLYTH 2012; DEN HEIJER,

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[6] This trend entails that technological and digital innovations fuse with physical space into hybrid environments and mobile solutions. Novel classroom furniture replaced linear rows of pre-fixed seating and tables with flexible arrangements, which enable new, learner-centered teaching and learning styles (STANG 2014, pp. 81–83). Beyond the physical and virtual settings, reimagining educational spaces resulted in institutions rethinking their service levels, and encouraged different departments and service-providers to work together in new organizational frameworks, oftentimes using the same spatial resources (FELIX 2011; ADAMS, YOUNG 2010; BEATTY 2010; BAILEY 2008). The same phenomenon appears *across* institutions: education providers of different types, but similar vision scopes can increasingly be found integrated spatially in the same building, cooperating on a partnership level, or even as entirely new organizations (STANG 2010a; HAITZMANN 2010; DEN HEIJER, MAGDANIEl 2012; GARDNER et al. 2013).

MAGDANIEL 2012; HAAR 2011; KESKINEN 2014; BOTHA 2015; RODIN 2007). Similarly, libraries and other nonformal places of learning are given increased attention as communal and urban learning centers, which partner with organizations and institutions across sectors, possibly even the private sector, to attractively position learning and education where citizens spend their time (STANG 2010b, 2011; HVENEGAARD-RASMUSSEN et al. 2013; DI MARINO, LAPINTIE 2015; SKOT-HANSEN et al. 2013). It appears that the relevance of novel spatial concepts and arrangements (ILSD), as well as education networks, which synergize and enable informal, self-driven, lifelong learning, and services for citizens (ECUD), has settled in the agenda of urban development (VISSCHER ET AL. 2012; BLEWITT 2010; WANKA 2010; LONGWORTH, OSBORNE 2010). Hence, this second and emerging phenomenon is referred to as *education-centered urban development* (ECUD); it is thus assumed that ECUD evolved from the expansion of ILSD and that this connection allows for the two discourses to be compared in terms of stakeholders and processes – a set of hypotheses which the thesis attempts to validate.

Very recently, the ECUD phenomenon could be confirmed from practical perspectives at the symposium '*Shaping Education Pathways*' in Nuremberg, Germany (VOLKMANN 2015b): The strong participation from municipal authorities displayed a vivid interest in regional education networks, while the discussions pinpointed a lack in "[…] *exemplary models and expertise in order to implement such cooperations, taking into account the different institutional and regional realities.*"[7] On one hand, this concerns a deficit of inspiration and opportunity – the simple lack of imagination of how such education networks and cooperations (and their physical embodiment) could look like and what difference they could make. However, the deficit seems to be rooted also in the *lack of know-how* of initiating and managing networks and partnerships, since such competences may not be universally present among municipalities and education institutions. This challenge may be enhanced by the fact that the prospective stakeholders of these novel, networked, *local education landscapes* (a generic term to refer to regional education infrastructure, encompassing formal, nonformal and informal education institutions, services, and environments (TIPPELT 2015, p. 21); short: LEL) would need to work with organizations and people that they rarely had to interact and cooperate with before.

For instance, in ILSD literature, the interaction and collaboration with the *architect or design team* is oftentimes mentioned as ambiguous, because they may not understand the institutional context and learning in the way teachers, staff, or students do (SHER-

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[7] Translated from German: "*Allerdings fehlen vielen Kommunen beispielhafte Modelle und Expertise, um solche Kooperationen angesichts sehr unterschiedlicher institutioneller und regionaler Realitäten implementieren zu können.*" (Volkmann 2015b)

RINGHAM, STEWART 2011; MARMOT 2014). Architects' assumptions about learning will affect the space design outcome (SHERRINGHAM, STEWART 2011, p. 111); thus, outdated ideas about how learning and teaching should work may yield a learning space that is not compatible to the local learning preferences, nor to the future ones (VAN DER ZANDEN 2015). This blind-spot requires an interaction to be established between the designers and the prospective users of the space, to define how the space should support their learning activities (SVETOFT 2009, pp. 285–286; SOMERVILLE, COLLINS 2008, p. 815; KÖNINGS et al. 2005, p. 646). Again, some literature states that architects may have troubles in living up to such alternative ways of design planning, partially because they have not been taught the required interdisciplinary competences, partially because the resulting 'disciplinary silo-thinking' leads to an antipathy towards user involvement and the perception of 'tainting' the design through others' ideas (SOETANTO et al. 2015, p. 21; SVETOFT 2009, p. 286). Hence, a lack of mutual understanding and communication, the challenge in managing a multitude of stakeholders, and the possible reluctance of commitment of the designers and architects may result in omissions in the design process and thus in learning spaces, which do not entirely live up to the users' expectations, and thus do not impose a difference in learning options.

Similar challenges are mentioned for other stakeholder groups. For instance, WOOLNER et al. debate whether young learners "[…] *have the competency to be effectively consulted* […] *and whether they understand the world effectively enough to give a view which should be listened to* […]" (2007, p. 236), in order to inform learning space design. As individuals, not only children, but virtually every learner and teacher has personal agendas and preferences, which may influence the design input (WOOLNER et al. 2007, p. 235). Such individual agendas persist on institutional or interpersonal level, which oftentimes lead to conflicts of interest among user groups, staff, and administration (Marmot 2014). Even with best intentions in finding the most suitable, yet universal, flexible and future-fit learning principles for space design, ultimately every stakeholder is limited to their own values and experiences (SHERRINGHAM, STEWART 2011, p. 111).

Eventually, these deficits in ILSD stakeholder interaction reflect the principal challenges of collaborative planning processes: "[…] *effective communication, collaboration, and interaction are important prerequisites to effective* [collaborative] *planning*" (MARGERUM 2002, p. 251). Given that managing these interactions and collaborations imposes a challenge to ILSD, its next stage, ECUD, could require even more attention and capacities to effectively facilitate stakeholder interactions towards building consent, attractive environments, and useful learning services. Especially the networked nature of ECUD presupposes that its participants are *willing* and *competent* to interact and com-

municate (SCHÄFFTER 2004). Hence, it becomes worth investigating the prospective issues ECUD may face in terms of stakeholder interactions. Accordingly, this thesis will explore the following *problem statement*:

**Similar to ILSD projects, stakeholder groups in ECUD planning may lack the experience and the competences of collaborating with each other. Shortcomings in mutual understanding and communication may put effective stakeholder interaction at risk – and thus project outcomes.**

## 1.1    Motivation, Hypotheses, and Research Question

Besides a personal research interest, it lies in the motivation of the author to add constructive value to the theoretical discourses of ILSD and ECUD. More concretely, the author aims to contribute solutions to the practical barriers of the two fields, so as to make them more accessible. This approach is given relevance by WATSON and WU, who conclude that

> "[…] *future research should more deeply investigate the limitations and challenges in regard to developing and promoting a learning city/region* [… and …] *deconstruct the several challenges inherent in the practical implementation of the learning city.*" (2015, p. 13f.)

The assumed interrelation of ILSD and ECUD holds the probability, that solutions are to be found among *both* discourses. Hence, a *literature review* of each shall be the foundation to *build a set of common themes* of stakeholder interaction issues, which a *case study* then shall validate. Eventually, this thesis' results shall either yield or enable others to form planning models and communication guidelines, as to ease stakeholder interactions. This approach builds on the following *hypotheses*, which have to be confirmed, in order for the problem statement to be valid, and which thus determine the structure of the thesis' body:

1. The ILSD discourse expanded and encompasses ECUD; thus, the conceptual connection of ILSD and ECUD is valid.
2. ILSD and ECUD both feature core issues around stakeholder interactions; thus, it is valid to study their interconnections and solutions.
3. ILSD and ECUD feature similar, comparable processes and models; thus, the methodical connection of ILSD and ECUD is valid.

The foundation of this thesis is the following *research question*: **How can stakeholders in ECUD accomplish mutual understanding and a more effective communication framework?**

## 1.2   Organizational Theory: Networked Governance for Lifelong Learning in 'Learning Cities and Regions'

The phenomenon of ECUD, whereby municipalities break down traditional structures in organizing regional education, in order to achieve more effect and reach (*top-down NG*), or whereby individual education institutions and stakeholders join in partnerships to tackle a common goal collaboratively (*bottom-up*), is not a unique phenomenon. Much rather, the idea of typical governmental services being 'outsourced' to externals, private sector contractors, or non-profits, has been in practice for decades already. The concept of *governing through network* has been framed within GOLDSMITH's and EGGER's work (2004), and emerged out of the realization that the contemporary world, its pace, challenges, and thus society itself, is increasingly complex (p. 7). This complexity challenges the government in delivering the demanded services and quality, and instead it is found that others might be much more capable to do so: "*The traditional, hierarchical[8] model of government simply does not meet the demands of this complex, rapidly changing age.*" (p. 7) At the same time, today's citizens have developed a personalized craving for participation and decision-making in issues that affect them (pp. 18-19). The result of these dynamics is a

> "*[…] broader shift in governance around the globe. Its heavy reliance on partnerships, philosophy of leveraging nongovernmental organizations to enhance public value, and varied and innovative business relationships are all hallmarks of these shifts. Governments working in this new model rely less on public employees in traditional roles and more on a web of partnerships, contracts, and alliances to do the public's work.*" (p. 6)

To put this global shift into ECUD perspective, LONGWORTH ([2014b]) describes the various contemporary and global challenges, and the multitude of concepts that urban regions began applying to combat them. He pinpoints: "*What unites all of them is the incidence and primacy of 'learning' in their journey to success*" (p. 3), and thus argues

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[8] "*In the twentieth century, hierarchical government bureaucracy was the predominant organizational model used to deliver public services and fulfill public policy goals. Public managers won acclaim by ordering those under them to accomplish highly routine, albeit professional, tasks with uniformity but without discretion. Today, increasingly complex societies force public officials to develop new models of governance. […] Rigid bureaucratic systems that operate with command-and-control procedures, narrow work restrictions, and inward-looking cultures and operational models are particularly ill-suited to addressing problems that often transcend organizational boundaries.*" (GOLDSMITH, EGGERS 2004, p. 7)

for the concept of '*Learning Cities*' (and *regions*, short: LCR) as an umbrella term. A LCR can thus be defined from various perspectives[9], but ultimately stands for the sustainable empowerment of lifelong learning and thus an enhanced quality of life among all citizens through the usage of *networked governance* (NG), for instance, coordinated through local government.
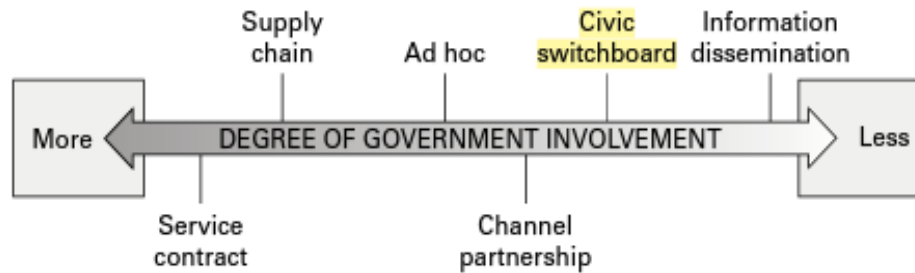


Figure 1: Types of Public-Private networks in NG (GOLDSMITH, EGGERS 2004, p. 71)

A "[…] *Learning city 'Goes beyond its statutory duty to provide education and training for those who require it"* (LONGWORTH in JONES 2010, p. 346); to enable such widespread lifelong learning, government and institutions have to be open for change, while cooperating with the outside world (TIPPELT et al. 2014, p. 67). Such networks, characterized as '*Civic Switchboards*', "[…] *connect diverse organizations in a manner in which they augment each other's capacity to produce an important public outcome*" (GOLDSMITH, EGGERS 2004, p. 70 and see Figure 1) – in terms of LCRs, this means the cooperative building of 'adaptive service structures' with enhanced quality and reach (TIPPELT et al. 2014, pp. 67–68). (As a matter of argument, *cooperative* governance may be a more accurate way of defining NG and 'networking' in an ECUD context, as SCHÄFFTER (2004) outlines[10].) "*It is a holistic mission which no single stakeholder can fulfill, but which*

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[9] "*A Learning City is often a densely populated, urban, geographically localised learning community that possesses learning partnership networks and empowers the development of its citizens, who learn from each other and from outside the community. In such a city, effective learning environments are created to ensure learning and innovation by every individual, every organization, every local community, and the city and its administration as a whole. In this way, quality of spiritual and physical life is achieved, and contemporary work competences are created that enable competitiveness and sustainable development within the city and its organizations'* […] *The essence of the learning city is sustainability in an innovative community.* […] *a learning city is a means of achieving a good quality of life.*" (JUCEVICIENE 2010, p. 420)

[10] The definition of what *network* means in the context of NG is actually not clearly defined in the work of GOLDSMITH and EGGERS (2004). Figure 1 shows the spectrum of cooperations that NG can potentially turn into, where the civic switchboard coincides with the nature of ECUD. Within this scope, SCHÄFFTER (2004) pinpoints that the partnerships that ECUD strives for may not necessarily be a simultaneous 'network': Partnerships and cooperations are specific; they require sustainability and are reciprocal to each party; networks are, by comparison, much more multi-lateral, obscure, unaccountable and informal. However, a network may be an important

*imposes a greater responsibility on those organisations more able to achieve it.*" (LONG-WORTH 2006b, p. 119) For instance, BAUMHEIER and WARSEWA (2010) argue that "*Good schools cannot work alone (any more)* [… and …] *increasingly* [… have to …] *engage in district and community based cooperation.*"[11] However, as BILANDZIC and FOTH describe (2015, pp. 1–3), ECUD networks also include nonformal and existing "*Communities of Practice*", such as hacker- or meetup groups. The sheer breadth of network options foreshadows a high demand in coordination capacities (GOLDSMITH, EGGERS 2004, pp. 45–46), which aligns with the above problem statement. Hence, NG is applied as a foundational perspective whilst discussing stakeholder interactions in ILSD and ECUD.

## 1.3   Methods and Limitations

In order to test the hypotheses and meet the thesis objective, a literature review is conducted across ILSD and ECUD, first identifying and discussing general[12] stakeholder involvement and interaction issues, then contrasting the findings with the planning process that the literature describes and recommends, and thus summarizing key themes of common interaction issues[13]. The assessment of interactions is focused on GOLD-SMITH's and EGGERS' network type of the '*Civic Switchboard*' (2004, p. 71). A framework and a set of terminology for assessing stakeholder interactions is derived from models of community interaction, which are discussed together with the ECUD planning processes further below. Besides drawing on ILSD and ECUD literature,  general literature and studies on stakeholder interaction within NG and collaborative planning complement the review (GOLDSMITH, EGGERS 2004; MARGERUM 2011, 2002).

In order to validate and triangulate the findings, a case study of a LCR, which includes both ECUD and ILSD aspects, completes the research. The case study focusses on the municipality of Hume City, a suburb to Melbourne, Australia. Hume is a LCR, which has been given the title *Hume Global Learning Village* (HGLV), and has carried out various

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resource to partnership and group forming and stabilizing. Despite this interesting terminological discrepancy, NG is used furthering in the thesis, because some ECUD literature is intentionally based on the concept.

[11] Translated from German: "*Eine gute Schule kann nicht (mehr) allein arbeiten* [… und muss …] *sich zunehmend auf quartiersbezogene Kooperationen einlassen*"

[12] The thesis remains within a *general* assessment of stakeholder interactions and focuses on *particular* groups and types only as examples of generic tendencies. While looking more precisely at specific groups, such as architects or youth, the capacity of a thesis does not match the required depth to do so. In this respect, any deeper exploration of individual groups would still require an understanding of the planning process they are active in. Hence, the focus on general stakeholder discussion and processes is justified.

[13] Although the theme of *power and control* does occasionally surface, the thesis does not actively venture towards a *discourse analysis* of the planning rhetoric, the act of urban place-making, or the political rationales that connect to ILSD and ECUD (JENSEN 1997).

additions to their physical LEL. Methodically, the HGLV is assessed through a thematic document analysis (RAPLEY, JENKINGS 2010, p. 381) and expert interviews (SALMONS 2015)[14]. First, the general literature review yields a set of models and stakeholder inter-action issues, which the document analysis uses as coding schemes for the local reality of Hume. The analysis encompasses especially municipal documents, local media pub-lications, and possible scientific reports from the Australian ECUD and ILSD discourse. The document analysis also aims to discover key personalities that influenced the plan-ning phases of the HGLV, which would constitute as 'experts' of the process and which are thus contacted for interviewing. The coding for both the document analysis and the expert interviews is based on the findings of the literature review.

### 1.3.1  Expert Online Interviews to complement the Case Study

Solely reviewing (grey) literature and documents for the case study is expected to yield not sufficient insight into HGLV stakeholder interactions of the past, as they might have never been documented and published externally. Hence, an additional method to uncover and evaluate tacit interactions shall enhance accuracy and depth. SALMONS' qualitative online interview framework (2015), is applied to expert interviews with key personalities of the planning process of HGLV. The combination of distance-transcend-ing, synchronous video conferencing technology (such as Skype (p. 184)) and identifying a diverse range of key personalities aims to give more "*holistic access*" to HGLV stake-holder interactions (Stenbacka in SALMONS 2015, p. 226). The following describes the method, intentions, as well as expected limitations.

Based on the epistemology that knowledge is created through conversation, while previously being interpreted by the author (p. 19), both, inductive and deductive reason-ing (p. 21) is applied. Although the nature of a case study calls for *inductive* or abductive filters (p. 26), and interviewing individuals equates rather to an explorative study, usually with the purpose to maximizing "*the discovery of generalizations*" (p. 28), specific findings

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[14] The combination of the two methods is based on their individual attributes: the document anal-ysis aims at reconstructing the historical details of the planning process and contrast the di-rectly expressed stakeholder interaction challenges with the findings of the literature review. Assuming a low time requirement in document collection (RAPLEY, JENKINGS 2010, pp. 384–385), document analysis can outweigh the long and uncertain response times of contacting people for expert interviews.

from HGLV alone may occur elsewhere, but cannot be taken as generalizations[15]. Instead, a *deductive* reasoning that aims to validate and triangulate the tendencies of the global literature research will dominate the interview structure.

Moreover, the deductive vista holds a potential bias, as the author might prioritize filtering the conversation only to validate the global tendencies, ignoring or unable to identify novel stakeholder interaction levels. Hence, it appears reasonable to collect the interview data within an explorative, inductive scope. As such, the author's position as an interviewer and researcher is ideally of an *etic* nature, approaching the subject from the outside, only guided by literature (p. 44). Due to more than two years in depth research in the field, as a result of a student researcher occupation, the author has gained a degree of knowledge, which pushes the researcher position slightly towards the *emic*[16] end, where the researcher is immerged in the matter. This position can be metaphorically translated into what SALMONS defines as the researcher role of a "*gardener*" and "*miner*" (p. 45): While the direct aspiration lies in '*digging out*' information, the fact that the formation of the HGLV lies more than a decade back, may require follow-ups, or pre-interview briefing, in order to '*cultivate*' a thorough response.

The combination of "*gardener*" and "*miner*" approaches suggests *semi-structured* interview structures (p. 65). Since it can be expected that high-ranking participants, such as mayors and politicians cannot afford the time for multiple or long-lasting interviews, the applied structure focusses on compact, guided, open-ended interviews and question types (p. 65, 70f., 203f.). Regarding the ICT environment, video conferencing[17] allows for the 'closest' interaction with the interviewee, while assuming that the targeted individuals have both access to the technology and feel decently comfortable with it. As such, Skype, a most widespread technology, appears suitable and efficient. A time difference of ten hours between the author's residence in Copenhagen and Victoria, Australia calls for close attention when scheduling the interviews.

A fundamental validity risk of the method is its uncertain sampling strategy. Since the target population are individual key personalities of the planning phase of HGLV, only a very limited amount of individuals appears credible, such as politicians, managers, key

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[15] While the case of Hume is meant to be transferable to other realities, (WHEELER et al. 2013, p. 8), the research reveals cases that feature local circumstances too diverse to simply 'parachute' concepts (ELLIOTT BURNS 2005, pp. 4–5), and that case studies yield only "*little transferability to other regions.*" (WILSON 2014, pp. 82–84)

[16] The *emic* approach means that the interviewer can quickly and ad hoc enter a conversation with an expert on the given topic without an elaborate and up-front definition of terms and context.

[17] Should the interviewee not agree with video conferencing as a conversation format, emailing the structured questions is the last resort strategy.

representatives of stakeholder groups, or designers and architects. Besides the challenge of identifying and successfully reaching out to the targets and the time constrains of the thesis, a minimum population benchmark is of limited value, as it is assumed that the majority of the stakeholder interaction issues are best or even only observed by the above key officials. Hence, the population goal is to interview as diverse as possible – a "*critical case*" or "*deviant*" approach (p. 121).

# 2 Literature Review

## 2.1 The Origin and Interdependence of ILSD and ECUD

Based on literature research, the primary presumption of this thesis – that ILSD evolved ECUD – appears only to be valid for the context of previous research of the author (VOLKMANN 2015d; VOLKMANN, STANG 2015) and its regional constitution, namely, for the case of libraries and adult education centers in Germany. Here, the idea of ECUD has indeed only emerged since the 'learning space' agenda gained strong momentum (STANG 2011; STANG, EIGENBRODT 2014). Internationally, however, ECUD can be traced back until the 1970s, when the Organization for Economic Co-operation and Development (OECD) initiated the '*Educating City*' strategy, which already captured the core idea of LCRs and had its peak in the 80s and 90s (JORDAN et al. 2014, p. 275). While these cities' strategies were majorly founded on economic rationales (YIGITCANLAR et al. 2008, pp. 63–65; LARSEN 1999), '*Learning Cities'* became a more popular in the 80s and 90s (SANKEY, OSBORNE 2006, p. 202f.), and first placed lifelong learning in the center of in the mid-90s (WATSON, WU 2015, pp. 9–11). LONGWORTH ([2014a]) thoroughly describes the recent history of LCRs and the global initiatives that advocated for and researched them.

This movement precedes the beginnings of intentionally and widely carried out ILSD and shows that especially the LCR discourse has been an independent scientific and governance concept for nearly half a century, even if the underlying rationales were solely economic ones in the very beginning (LARSEN 1999). In contrast, schools only adopted design-centrism during the recent decades (HEPPEL 2013, p. 244; CLUGSTON 2013, p. 249), and the idea of '*Learning Centers*', spearheaded for instance by the Anglo-American Information Commons, emerged only during the 1990s (BEAGLE 1999). It appears that, throughout the evolution of ILSD, collaborative and networked approaches became more common, and thus resulted in the generalization that the innovation of learning environments led to the 'invention' of ECUD.

Instead, the research suggests that ECUD and ILSD are both driven by a core of *common rationales*[18] and overlap in their networking and stakeholder interaction processes. Henceforth, there is an interdependence between ECUD and ILSD, which is

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[18] STANG and EIGENBRODT (2014, pp. 233–235), for instance, observe trends, such as demographic change, increased individualization and fragmentation, urbanization and mobility, and a knowledge based economy and working world, where learning is increasingly important. These trends advocate for an educational (and experience-) landscape, influenced by both, cooperative networks among learning suppliers, and spatial, technological and digital interventions (2014, pp. 241–243).

consolidated in figure 2. The figure illustrates the different degrees of networking and stakeholder involvement, which overlap between ECUD and ILSD – all happening and embedded in the LEL.



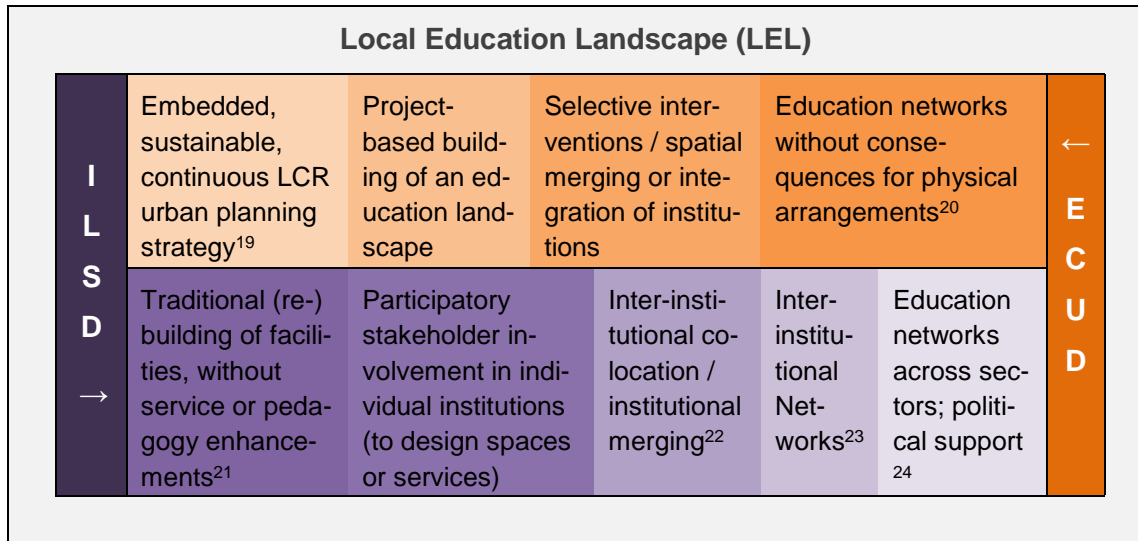| Local Education Landscape (LEL) | | | | | |
|---|---|---|---|---|---|
| **I L S D** | Embedded, sustainable, continuous LCR urban planning strategy[19] | Project-based building of an education landscape | Selective interventions / spatial merging or integration of institutions | Education networks without consequences for physical arrangements[20] | | ← **E C U D** |
| **→** | Traditional (re-)building of facilities, without service or pedagogy enhancements[21] | Participatory stakeholder involvement in individual institutions (to design spaces or services) | Inter-institutional co-location / institutional merging[22] | Inter-institutional Networks[23] | Education networks across sectors; political support [24] | |

Figure 2: Continuous degrees of networking and stakeholder involvement of ILSD and ECUD in a local education landscape (LEL)

From the viewpoint of ILSD, the stronger the degree of networking or the ECUD agenda, the smaller becomes the necessity to act upon the LEL through physical interventions. However, any degree of educational collaboration still has an impact on the LEL. Conversely, the same impact on the LEL is the case for educational construction

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[19] ECUD overlaps completely with ILSD, if the latter becomes the strategic agenda of urban development, meaning that any intervention with the community architecture and city design is assessed within the scope of learning. In parts of Australia, as LONGWORTH cites, lifelong learning is even considered in the design of new estate districts (2006b, p. 128, 183).

[20] ECUD can take place without any physical ILSD, such as in the instance where education institutions cooperate to share resources and services, but without changing their spatial settings.

[21] Usually, schools or libraries may have to be rebuilt as a result of population growth or facility erosion, among others reasons. In these cases, traditionally, *no* networking or stakeholder consultation is applied, while the education landscape *is* shaped nonetheless.

[22] This stage refers to the spatial co-location or integration of previously separated institutions. This can mean the assemblage of a library and adult education canter adjacent to each other, forming a 'campus', such as in Nurnberg, Germany (STRÄTER 2012), or even their merging into one building (STANG 2010b; HARRISON, HUTTON 2014).

[23] This stage refers to a network among education institutions, created by the institutions themselves (bottom-up), and may include interventions to their physical settings, or not.

[24] This terminal stage refers to education networks that may go beyond traditional education institutions (for example partnering with the corporate sector), and/or networks that are validated or even steered by local politics. As in the stage above, interventions with the physical setting are not required, since the effect of the partnerships itself affects the education landscape.

without any stakeholder interaction (bottom left field). As such, ECUD and ILSD are concepts thoroughly interwoven on theoretic grounds, and appear closely aligned on practical levels, in terms of NG and stakeholder interaction options. In turn, this alignment validates the third hypothesis – that ECUD and ILSD feature comparable processes.

In conclusion, ILSD and ECUD have a common rationale and the same purpose of improving the LEL; they share a mutual continuum, from the perspective of NG and LELs, highlighting the various potential interfaces of common stakeholder interaction. Within this continuum, both movements are confronted with managing stakeholder interactions of various kinds, which (as the above figure 2 illustrates) especially overlap at the consultative/participative parts of the planning processes. While this technically renders the first hypothesis of the thesis invalid, it still emphasizes the conceptual connection of ILSD and ECUD, which thus allows for a comparison between the two.

## 2.2    Stakeholder Interaction and Involvement as a common Challenge to ILSD and ECUD

In both ILSD and ECUD, the various parties of stakeholders that are mobilized to participate in the planning challenge the traditional methods and thought models of the project owners. A combination of lacking institutional tacit knowledge of *how to mobilize, lead, and facilitate interactions*, as well as the inexperience of the stakeholder groups themselves, which are sometimes exposed to completely unknown processes and demands, adds uncertainty, complexity, and potentially conflict (DUKE 2012, pp. 834–835; LAITINEN 2015, p. 51; VAN DER ZANDEN 2015, p. 7).

These accounts appear to validate the second hypothesis of core universal issues in stakeholder interaction among ILSD and ECUD. In order to elaborate on these issues and generate common themes, the following sub-chapters explore the issues in stakeholder typology, their selection, communication, and commitment in further detail. Thereafter the findings are contrasted to the planning processes, which the literature discusses.

Despite these interaction challenges, the general opinion that involving stakeholders is necessary and important persists and is widely discussed (LONGWORTH 2006b, pp. 5–6; CARE 2015; FOSTER 2014; VALDES-COTERA 2015, p. 5; DOGLIANI 2014). While these discussions are sometimes still isolated, 'ivory tower' discourses with questionable understanding of the reality of planning, as LONGWORTH criticizes (2006b, p. 83), the general public has itself begun to demand a voice and participation in decision-making, as a result of societal shifts towards individuality and new technological means of interaction

(GOLDSMITH, EGGERS 2004, pp. 18–19). In general, such participation concerns both, students and staff, learners and teachers, whose opinions on learning arrangements and services are widely regarded as crucial, since they will be the ones *using* the spaces and services (KÖNINGS et al. 2005, p. 645; THODY 2011, pp. 129–130; WOOLNER et al. 2007, p. 234).

Hence, successful stakeholder mobilization demands an internal and external vista: first, breaking down barriers between institutional departments and staff to collaborate, and second, empowering representative participation of customers and lays (DI SIVO, LADIANA 2010, pp. 5351–5352). From a NG perspective, this concerns not just users and beneficiaries, but also project facilitators, decision-makers, administration and service contractors, as well as other education institutions, possibly even competitors – interest groups in the broadest sense (LONGWORTH [2014b], pp. 6–7; WATERHOUSE et al. 2006, pp. 4–12). Fundamental to a comprehensive local education network is the inclusion of existing education institutions (formal and nonformal), and their user communities. In the broadest sense, this includes even self-organized groups, like hackerspaces or meetup groups (BILANDZIC, FOTH 2015), mobile workers and creative 'nomads' (DI MARINO, LAPINTIE 2015), as well as community and volunteer groups (LONGWORTH [2014b], pp. 6–7, 2006b, p. 154ff.; GOULDING 2009, pp. 42–44).

Mapping and identifying synergies for such diverse groups – and therefrom constructing vertical and horizontal partnerships[25] – can yield the benefits of connecting untapped learning capacities and opportunities, as well as generating advocates, multipliers, and executioners of learning among the community (BAUMHEIER, WARSEWA 2010; LONGWORTH 2006b, p. 119) – however, as a result of decades of '*silo thinking*', building such networks can meet resistance and closed structures on every level (DUKE 2000, 2012). The interrelations and interactions of these various stakeholders are more extensively illustrated in LONGWORTH and NORMAN (2006b, p. 107), BRANDSTETTER et al. (2006, p. 10) or HARRISON and HUTTON (2014, p. 246f.) for ECUD, and for ILSD in the *Learning Space Toolkit* (NORTH CAROLINA STATE UNIVERSITY LIBRARIES et al. n.d.).

### 2.2.1  Stakeholder Selection and the Challenge of 'all-inclusive' Planning

This bulk of interest groups holds the hasty impression that ILSD and ECUD would simply need to connect and engage with *all* their stakeholders in the LEL. Indeed, ambitious ECUD aim to give *every* citizen access to education and learning (DI SIVO, LADIANA

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[25] Horizontal partnerships address institutions of the same type, i.e. school-school partnerships; vertical partnerships refer to institutions of different types, i.e. schools and public libraries. The range and magnitude of these partnerships is encouraged to vary from local to global scale (BUISKOOL et al. 2005, p. 201).

2010). Oftentimes, all-inclusive approaches are based on an (altruistic) drive to reach and empower especially the underprivileged populations, those 'disconnected' from education[26], or simply yet untapped customer groups (GOULDING 2009, pp. 45–47).

However, project owners need to consider the *practical manageability* of such broad community engagement: resources (including existing networks and relations[27]), human capacities, time and funding are often limited (MARGERUM 2002, pp. 244–246; METAXIOTIS, ERGAZAKIS 2008, pp. 145–146). Moreover, the question whether engaging a certain group will yield reciprocal benefits and unique insights is depending on the *effectiveness of the inclusion* (GOLDSMITH, EGGERS 2004, p. 151; KÖNINGS et al. 2005, p. 646), stressing the need for appropriate participation methods and quality execution. Moreover, democratic and practical representation[28] has to be clarified (especially when forming exclusive committees or focus groups), since a citizen group or partner organization is usually represented by chosen individuals. Technological as a means of participation and collaboration (e.g. online surveys or digital forums) may enable broader reach and access, but also open up entire new ways of interaction and possible exclusion.

The challenge therefore lies in *triangulating individual opinions, power relations, and channels*, while *prioritizing inclusiveness and representation over sheer size of inclusion* (MARGERUM 2002, pp. 242–244), pointing to the importance of careful *stakeholder selection* and portfolio creation. In essence, such analysis aims to filter citizen or user groups, their learning needs and attitudes, where the learning does or should happen, how to involve and where to meet them, and thus how to design the planning process, for instance exemplified by the LCR of Kaunas, Lithuania. Here,

> *"It was considered especially important to understand the educational in-*
> *terests of the Kaunas people and their needs in the initial stage, and also*

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[26] Indeed, the strongest reciprocal synergy is cited to be the focus on those in need of access to education – which can be especially attained through the open and inviting settings of libraries as community centres (MATTERN 2014; GOULDING 2009, pp. 45–47; HVENEGAARD-RASMUSSEN et al. 2013).

[27] Relations between education organizations exist prior to and independent of a LCR network. Not accounting for these existing relations may form a network of redundancy and potential conflict. Hence, analysing and mapping existing interrelations in the LEL, followed by a portfolio of ideal stakeholder or partner prospects is proposed (GOLDSMITH, EGGERS 2004, p. 151).

[28] As thoroughly examined by WOOLNER et al. (2007, p. 236, 242, 246), children, involved in design planning, for example, may lack the competency or focus to comprehend the complexity of the topic discussed, and thus give misleading input into the consulting process, also because they only inhabit the space for a temporary duration. Conversely, the study shows that their inexperience may enable them to think more creative and innovative, in contrast to adults. Resorting to expert consultancy can similarly give a narrow view, because of "*progressive enthusiasts*", taking the stage to pursue personal agendas (WOOLNER et al. 2007, p. 235). This example demonstrates the complexity of foreshadowing the values and shortcomings of consulting certain user groups.

> *to discover their attitude towards different places (environments) of formal*
> *and nonformal learning and methods of learning."* (BAGDONAS 2010, p. 74)

The survey highlighted the "*civic capital*" (JOHNSON 2010, p. 573) of the different groups, meaning a clearer picture of those willing to engage (families) and those rather reluctant to do so (employers), and made their understanding (or misunderstanding) they have of learning transparent (JUCEVICIENE 2010, p. 423). As this example illustrates, the assessment criteria for 'communities' generally go beyond demographic, ethnic, and cultural demarcations, but include also the scope of analysing regional employers and the labour force for talent capacity, in order to inform urban economic development and innovation strategies, (RUTTEN, BOEKEMA 2012, pp. 983–986; LANDRY 2008, pp. 266–267; LARSEN 1999). Throughout the ECUD planning process assessment below, these stakeholder and community analyses is explored in greater depth.

### 2.2.2  Communication, Interaction, and Commitment of Stakeholders

Beyond identifying and selecting the right partners and citizen representatives, the *communication* around the planning process is vital (MARGERUM 2002, p. 251; ECKART et al. 2012). In traditional project and planning structures, communication may lack focus and precision, as JOHNSONS's and LOMAS' process comparison will show in the next chapter (2005, p. 22). Traditional flows and structures deter the flow of information, hinder the exchange of ideas and thus render collaboration ineffective (GOLDSMITH, EGGERS 2004, pp. 44–45; SOETANTO et al. 2015, p. 21).

However, many communication discrepancies are not only a result of unsuitable methodology or technology, but of attitudes, (cultural) values, and the differing interests of the stakeholders (GOLDSMITH, EGGERS 2004, pp. 40–42; METAXIOTIS, ERGAZAKIS 2008). MARGERUM identifies *ideology* as a major obstacle in general collaborative planning, preventing the formation of and the identification with common goals and directions (2002, pp. 248–249). Thus, besides simply denying collaboration, stakeholders may use their powers to control agendas and released information, in order to further their interests.

As a generic solution, MARGERUM proposes "*to develop strategies and tools to fully explore these value differences*", and furthermore accomplish buy-in through interrelating the central problem to the issues (or the opportunities) each individual stakeholder faces (2002, p. 249). To do so, he stresses to equalize the powers among stakeholders and the information they have access to; his analysis shows that when stakeholders realize that the solution to their individual challenges can be attained through a common

goal, their mutual contributions can become more apparent[29] – a strategy that suits the ECUD reality especially, due to its local-issue-based nature (LONGWORTH [2014b], pp. 1–3). The core condition to foster commitment in such a way, however, is that the project owner is equally committed and authentic, which demands internal unity of the organization, which manages the planning process or the network, e.g. local government.

In conclusion, the hypothesis that stakeholder interactions impose critical challenges to both ILSD and ECUD can be confirmed. In the scope of planning, these range from identifying and selecting the right user/citizen representatives and partners, over aligning the participants' values and interests into one vision and goal, to fostering a culture of trust, commitment, sharing, and collaboration. The local context, the intended learning enhancements, as well as the available resources and competences appear to restrict and determine an optimal mode of stakeholder involvement and collaborative planning. Within the vista of this conclusion, the assessment of the *planning and design processes of ILSD and ECUD* give further structural insights on stakeholder interaction issues.

## 2.3    ILSD Planning and Design Processes

Traditionally, JOHNSON and LOMAS (2005, p. 22) define the design planning process as: requesting institutional approval, selecting a project manager who oversees the contractors and internal procurements, while architects carry out needs assessments to yield a space programming and (after periodic reviews) a design. While in reality, many other institutional specialists and decision makers may have their role and say[30], this basic process involves only the coordinator, the architect, and the prospective contractors, but no users or staff. In combination with a strict up-front or 'waterfall planning', design shortcomings can only be discovered during construction, and thus, learner-centric adaptions are difficult to realize.

Their alternative, more communicative, involving, and holistic process recommendation gives the project manager the role of a "*champion*" and a team leader (1), who selects a team of stakeholders (2) and guides them through the process. The team identi-

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[29] BROOKFIELD (2012, p. 878) expresses similar ideas from the perspective of collective community development: "*First is the task of people learning to recognize how their individual well-being, and their identity development, is inextricably linked to the interests of the wider group. Second is learning to develop agency, defined here as the inclination and capacity to act on, and in, the world in a way that furthers co-operative socialist values and practices. Third is learning to develop collective forms, movements, and organizations.*"

[30] Especially for higher education, the involvement of stakeholders has been researched and mapped out with high precision (NORTH CAROLINA STATE UNIVERSITY LIBRARIES et al. n.d.). ROOK et al. (2015, p. 22) give a practical example of the complexity of such interactions.

fies the institutional context (3), specifies learning principles (4) and definite learning activities (5), which the space shall encourage. From this backlog of principles and visions, design principles are developed (6) and locked down with other requirements (7) in the design brief. Next, Johnson and Lomas suggest to define concise methods of ongoing experimentation, iteration, evaluation and improvement (8). Only after ensuring the buy-in of all stakeholders (9), the architect is hired (10) to take the design briefing forward.

Comparing this process model to others and good case practice, the different steps appear interchangeable to a certain degree. For instance, for the rebuilding of a school in Chicago (VALERIO DEWALT TRAIN ASSOCIATES, FMG ARCHITECTS 2011, p. 5), the architects (10) were hired in the very beginning, to ensure their "*immersion*" and understanding in the project by observing everyday school activities. SVETOFT recommends this decision:

> "*Involving the designer in the briefing meetings as early as possible can remove the need for transmitting important information through a third party.*" (2009, p. 287)

Besides ensuring the correct mindset of the designers, their interactive abilities and creative contributions can be used as a facilitation lever: For the design of Seattle Public Library,

> "[…] *the architect was not chosen for his final design, but for his ability to contribute to the process of negotiating with the many stakeholders involved."* (SKOT-HANSEN et al. 2013, p. 10)

In contrast, a Scottish example shows the synergies of multiple and heterogeneous design teams, embedded in the process as a design challenge (SCOTT-WATSON 2008, pp. 2–3). The dynamic ways of using architects demonstrates that the flow of planning elements in ILSD is interlinked with the degree of involvement of the stakeholders and the effects that this participation is intended to contribute. In the following, the variance of JOHNSON's and LOMAS' (2005) model is assessed further to uncover the stakeholder dynamics among the entire breadth of a collaborative ILSD process.

Prior to engaging with as many stakeholders as possible, a consideration of *who* to engage (2) and what resources (time, pedagogy, and funding) the project has available is crucial (HARRISON, HUTTON 2014, p. 238). The project owner has to assure internal clarity on goals and vision, intended processes of design and participation, before delegating it to a coordinator (1). Upon engaging with stakeholders (2), while many publications mention the various stakeholder groups to consider, very few of them state on *how* to engage with them, through which channels to reach them and how to gain their interest

in devoting their time (i.e. CUNNINGHAM et al. 2014, p. 9)[31]. JOHNSON's and LOMAS' (2005) recommendation to empower a "*champion*" (1) in the beginning suggests that an individual with high charisma, institutional experience, and 'social capital' may attract and connect the right participants.

Generically, to achieve solid stakeholder engagement (2), it is suggested to exhibit *transparency* about the space purpose and visions, learning benefits, and involvement processes (PETERSON 2004, p. 38; NYGREN 2014, pp. 3–6), while mutual understanding and goal transparency is crucial for participants, as well. They have to be *willing to take responsibility and possibly adopt different mindsets and perspectives* (SOMERVILLE, COLLINS 2008, p. 815). The *roles and rules of the process* have to be clear (CARE 2015, p. 129), and may be defined in a *collaborative memorandum*. The successful buy-in of stakeholders should already be the point, where a reciprocal, ongoing dialogue has begun (8), which will eventually turn into an evaluation and feedback tool, and will last beyond the completion of the space (JOHNSON, LOMAS 2005, p. 24). This continuity also affects the design process: "[…] *there should not be a time at which consultation is 'over' and users feel that they can no longer comment or request change."* (WOOLNER et al. 2007, p. 246)

The phases (3-5) introduce a broad *research phase* that combines architectural hard facts and data with user research and pedagogical trends and principles. The *institutional context* determines the technical premises and limits of the space, while fostering data to inform learning programming. It is at this stage, where broad stakeholder involvement can commence. User research on learning behavior and service preferences has been reported on and documented extensively, yielding a range of well evaluated tools that allows for diverse dimensions of involvement, ranging from simple consultation (3-5) to thorough and empowered co-design (6-7) (NORTH CAROLINA STATE UNIVERSITY LIBRARIES et al. n.d.; IDEO 2014, pp. 25–100; LEE, TAN 2013; KÖNINGS et al. 2005, pp. 654–655). However, each model is oftentimes only valid for a certain institution type and education system; moreover, the models tend to ignore alternative ways of stakeholder involvement and thus are only points on a spectrum of theoretic options of design involvement. (This discussion continues in the next chapter on ECUD processes.)

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[31] As a good case example, SCOTT-WATSON (2008, pp. 2–3) and PETERSON (2004, p. 36) both report on positive experiences using *external facilitators* to conduct inclusive workshops. They serve a combined approach to activate creativity, while building capacity and understanding for space and learning, as well as each other. PETERSON elaborates that intensifying contact can enhance group cohesion, ownership, and overall buy-in at an early stage already, if workload adjustments are made for staff to participate. Hence, contracting for external coordinators is not uncommon. The identified theme on facilitation explores this further.

Independent of the chosen degree of design interaction, explorational, creative, visual, and facilitated methods are said to help breaking down traditional thinking between stakeholders (THODY 2011, pp. 130–131; JOCHUMSEN ET AL. 2014, pp. 69–79; SCOTT-WATSON 2008, pp. 2–3). Such methods are crucial in order to produce design principles that allow adaptability to future changes of the space and the lived pedagogy (Akinsanmi 2013). Besides inviting stakeholders to join a design process, the project owner can also use their network and extract good-case practice from other or even radically different projects – not only through documentation sharing, but moreover through *coordinated site visits* together with key stakeholders (CARE 2015, p. 114; ECKART et al. 2012). In the end these principles have to result in a definition of the learning options and activities (5) in the space (BILANDZIC, FOTH 2015, p. 7; NYGREN 2014, pp. 3–6); all design principles need to translate into quantitative and qualitative requirements of the architectural brief, so that the design team follows the principle '*form follows function*' (CUNNINGHAM et al. 2014, p. 12). Beyond simply locking down requirements, a radical change of design also demands an institutional reflection on change management processes to be initiated (JENSEN, PEDERSEN 2009, p. 177).

As a conclusion, in order to overcome the communication lack and delay of the traditional design process (JOHNSON, LOMAS 2005, p. 22), a collaborative one adopts the mindset of continuity and iteration:

> "*As design is an ongoing process, part of this must be the realization that consultation is not an event, or even a series of events. Rather, it is a process which allows all parties to explore the extent of a problem, to look at different perspectives, to audit current practice and to dream of future approaches.*" (WOOLNER et al. 2007, p. 246)

As the discussion demonstrated, the process can be implemented highly dynamically. According to SEBASTIAN and PRINS (2009, pp. 108–110), factors that may influence the decision are

> "*the individual factors (e.g. style of problem solving, open-mindedness, knowledge and experience), the group factors (e.g. style of communication, cohesiveness, hierarchy and group climate) and the external conditions (e.g. management style, company situation and restrictions).* [… Eventually, the process …] *cannot be standardised. Hence, managing creative teamwork means creating, shaping and customising these frames to apply them in different projects and to different design actors and organisations.*"

## 2.4   ECUD Planning Processes

The fundament of the discussion are the ECUD planning models of METAXIOTIS and ERGAZAKIS (2008, pp. 141–143, which rather describes the creation of KCs), VALDES-COTERA (2015, p. 3), LONGWORTH (2006b, pp. 164–165), and WHEELER and WONG (2013, p. 4), which demonstrate a similar diversity, as just discovered among ILSD planning processes. METAXIOTIS' and ERGAZAKIS' "*KnowCis methodology*" (see figure 7) groups the entire process in fife phases. The model begins with a strong emphasis on a "*Diagnosis*" of the city's "*status*", which parallels with the '*institutional context*' in Johnson's and Lomas' ILSD flow (2005). The diagnosis phase is "[…] *based on studies, opinion polls and qualitative evaluations* […]", and includes the "[…] *definition of a series of qualitative and quantitative indicators* […]" (hence already establishing a cohesion between the fifth phase, '*measurement and evaluation*', as recommended in ILSD, as well). As the model targets especially economic development, the research goes beyond discovering existing and innovative learning practices, but moreover interprets *socio-economic and infrastructural circumstances*[32].

VALDES-COTERA's ECUD process summary addresses LCRs directly, and blends the above '*diagnosis*' and '*strategy formulation*' (2015, p. 4). He also combines information gathering with political initiative, but focusses rather on issues, which collective learning strategies can resolve. In accordance with MARGERUM's (2002) recommendations above, He defines the output of the planning as creating a city and business plan, as well as a "[…] *city charter, outlining the actions that need to be taken to improve learning in the city.*" Such conclusive agreements or contracts, which sum up the rules, roles, responsibilities and communications, are mentioned as essentials for sustainable partnerships (BRANDSTETTER et al. 2006, pp. 7–8). Compared to VALDES-COTERA's rather *project-based* process, the *KnowCis* model is *cyclic*: After an action plan has been carefully deduced from the research and the strategy,

> "[…] *public or private organizations and companies implement the defined measures and projects. In this way, each stakeholder remains committed and contributes to the effort.*" (METAXIOTIS, ERGAZAKIS 2008, pp. 141–143)

An evaluation phase concludes the flow, while a knowledge management process ensures to sustain the tacit knowledge of the network and partnerships. From this point, the process initiates at the diagnosis again.

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[32] METAXIOTIS and ERGAZAKIS discuss nine "*dimensions*" of KCs, which are to be assessed in strengths and weaknesses, in order to determine a strategy, as well as "[…] *actions and interventions* […]". (Figure 8 shows a revised composition of these dimensions.)

A different *cyclic* approach is the *learning community framework* and life cycle of WHEELER and WONG (2013, p. 4). Their diagnostic and strategic approach lies in fulfilling a comprehensive set of critical success factors, while constantly evaluating the network on a qualitative basis throughout the three phases of the life cycle. Throughout this cycle, METAXIOTIS and ERGAZAKIS (2008, pp. 141–143) urge an "[…] *open & equal participation of all citizen & stakeholders* […]", enabled by "*Political & societal leadership & commitment*". The *KnowCis* model and the *learning community framework* do not present concrete options on *how* to attract and engage these stakeholders, however. In contrast, LONGWORTH's LCR approach is more people-centred: Stating that the administration needs to have a "[…] *full grasp of its internal actors, and of the population*" (2006a, p. 5f.), he also begins with a research and diagnosis phase. Similar to BUISKOOL et al. (2005, p. 200), he suggests to first create an "[…] *inventory of human skills and talent*", then brainstorm a LCR-scenario of unlimited resources, and "*match the two*"[33] (2006b, pp. 164–165). He thereafter recommends leveraging on the identified volunteering and community groups as sources of 'executive power'[34] and empowering the spotted community leaders to unite the different groups. To ensure continuity, decision-making influence, representational and organized consent, a creation of a *learning* or *city development committee* is encouraged (VALDES-COTERA 2015, p. 5), which is also the premise of the *KnowCis* model.

Moreover, a rather *cultural* approach to stakeholder engagement is presented by VALDES-COTERA, arguing that *enthusiasm* has to be generated around lifelong learning (2015, p. 6). He suggests annual celebratory "*learning festivals*", where "[…] *relevant*

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[33] If facilitated accordingly, this approach can be highly creative and innovative, while pragmatism and realism of the suggested plan are double-checked by critically assessing the network's capacities. A very pragmatic and goal-oriented facilitation may lead to group confidence, and thus to quicker visible outcomes, which validate the collaboration endeavours (MARGERUM 2002, p. 245).

[34] Having stakeholder groups implement or execute the agreed-on action steps and projects requires coordination activity from the authorities. In order not to sacrifice resources and efficiency, it can be advised to engage stakeholder groups in ways that build on their (shared) strengths, capital, or core services, as well as the synergies of their combinations. For instance, the co-location of public libraries and their sharing of facilities and information services can help leverage the capacities of other stakeholders, and thus improve the LEL with more learning opportunities of enhanced quality and accessibility (SUNGA, HEPWORTH 2013).

On the contrary, focussing on core strengths can also exhaust stakeholders: "*Often nonprofit organizations are so overwhelmed with demands for their core services that they lack the time or the resources to find and interact with others even in the same sphere.*" (GOLDSMITH, EGGERS 2004, p. 61) Here, it can be argued that "[…] *the entire network is only as strong as its weakest component*" (Phillip Cooper in GOLDSMITH, EGGERS 2004, pp. 61–64). On the contrary, BAUMHEIER and WARSEWA (2010) argue that cooperatively created services are oftentimes added on top of core services, draining efforts while not generating the best possible value in learning opportunities. Instead, the innovation of these core-services should be focused on – especially regarding formal and traditional education providers. These underlying details have to be considered when delegating responsibilities to ECUD stakeholders.

*organizations* [..] *exhibit their courses, products, materials, etc.*"[35], symposiums, or simply media campaigns. (Besides, a digital forum is suggested.) While this strategy demands a high degree of buy-in among education institutions, politics, and media, as well as resources, festivals and citizen summits can be key motivational platforms for the public to co-create *bottom-up initiatives* (GOLDSMITH, EGGERS 2004). The channels of communications that festivals open up can be valuable for the administration in order to confront itself with novel perspectives and citizen input, and to downscale learning to everyday, yet exciting and engaging grounds. An example of such an event is

> *"[…] the annual Albury Wodonga Festival of Learning. This is a two-week program of events which involves a large number of education and other institutions opening up their activities to the general public and generally promoting community involvement in learning. A version of the Festival, in the form of an 'adult learners' week', was in place before the advent of the Learning Cities Project, which 'adopted' it and used it as a vehicle to promote the Learning Cities concept.*" (WATERHOUSE et al. 2006, p. 17)

### 2.4.1 Top-down and bottom-up Processes

The common denominator of these models is their assumption of the local government initiating and being in charge of a "*policy driven*" LCR (BRANDSTETTER et al. 2006, pp. 3–5), which matches the assumptions of NG. Interestingly, none of the above models assumes a bottom-up approach: education networks can also be *locally driven*, based on the initiative of individual institutions or groups. For instance, BAUMHEIER and WARSEWA (2010) report on various local, horizontal school networks in Europe. For these, the bottom-up initiation was essential, but only in combination with *top-down support* from political levels. Their example emphasises the universal need to achieve political buy-in and support, in order to spread the networked efforts across the entire LEL and local communities.

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[35] The celebratory aspect of ECUD follows the discourse of urban development into planning for experiences and building *experience-scapes* (SKOT-HANSEN 2008; MARLING et al. 2008). This concept is also prominent in ILSD (JOCHUMSEN et al. 2014, pp. 69–79). For example, STANG and EIGENBRODT (2014, pp. 241–243) report on the past and future visions of '*orchestrated experience worlds*' ('*inszenierte Erlebniswelten*'), which target peoples' increased demand for '*physical experiences*'. They see physical centres, which act as meeting and communication places, and are meant to spark excitement and inspiration, yet without a character of consumption, as a significant element of future LELs. Taking this idea further, ECUD planning for 'enthusiasm for learning' can go beyond the transitory, selective, project-based, and possibly costly nature of festivals and events by including the design of experience-scapes and infrastructure into urban planning.

Upon elevating the LCR on the political agenda, bottom-up initiatives can still be an option to give stakeholders a channel for empowered input. The Lithuanian LCR of *Kaunas* exemplifies how such a blend of policies can function together (JUCEVICIENE 2010). Figure 10 illustrates how citizen ideas or input from organizations are directly provided to the learning city council: The council consults and supports the initiators with advise, project planning, network connections, and even facilitates competence development (p. 472).

As a result – independent of a top-down or bottom-up policy – local LCR governments are given the roles of a *facilitator and enabler* to plan and instantiate LCRs. Thus, despite the idea that NG would *ease* operations for governments, they are confronted with a multitude of responsibilities and governance challenges (LONGWORTH [2014b], p. 14; WHEELER et al. 2013, p. 16; GOLDSMITH, EGGERS 2004, pp. 45–46).

## 2.4.2  Spectrums of Citizen Engagement

The discussion illustrates manifold approaches as to *when* community engagement is happening, and *to what degree*. In order to structure these various perspectives, this subchapter assesses at the methods of citizen engagement in relation to ECUD. First, LONGWORTH outlines a '*Consultation ladder / staircase*' (2006b, p. 152; [2014b], p. 8, see figure 3), which ranges from simply *informing* citizens about what the government will be implementing, over the state of *discussion*, *engagement*, *motivation*, and *participation*, to full citizen *empowerment* and decision-making. As the government considers the public opinion to a higher degree and allows it to influence policy decisions, citizens can advance from being limited to subscribing to and accepting the government's plans to becoming partners, co-implementers, and possibly managers of a project or institution.
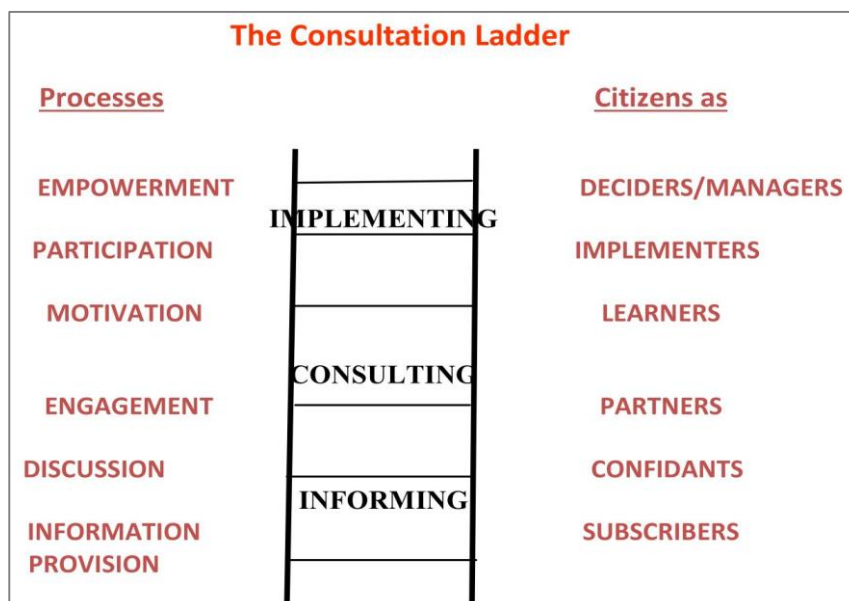
Figure 3: LONGWORTH's Consultation Ladder ([2014b], p. 8)

While LONGWORTH does not describe the stages of the model very accurately, its structure mimics ARNSTEIN's '*ladder of citizen participation*' (1969, see figure 4), which describes citizen engagement from a rather critical[36] (and nowadays historic) perspective. A more contemporary model is contributed by the INTERNATIONAL ASSOCIATION FOR PUBLIC PARTICIPATION (IAP2 2007, see figure 5): Just as in LONGWORTH's abstraction, the "*spectrum of public participation*" maps the level of public impact from *informing* to total *empowerment*, but it furthermore provides practical definitions of what citizens can expect, as well as example techniques for their engagement.



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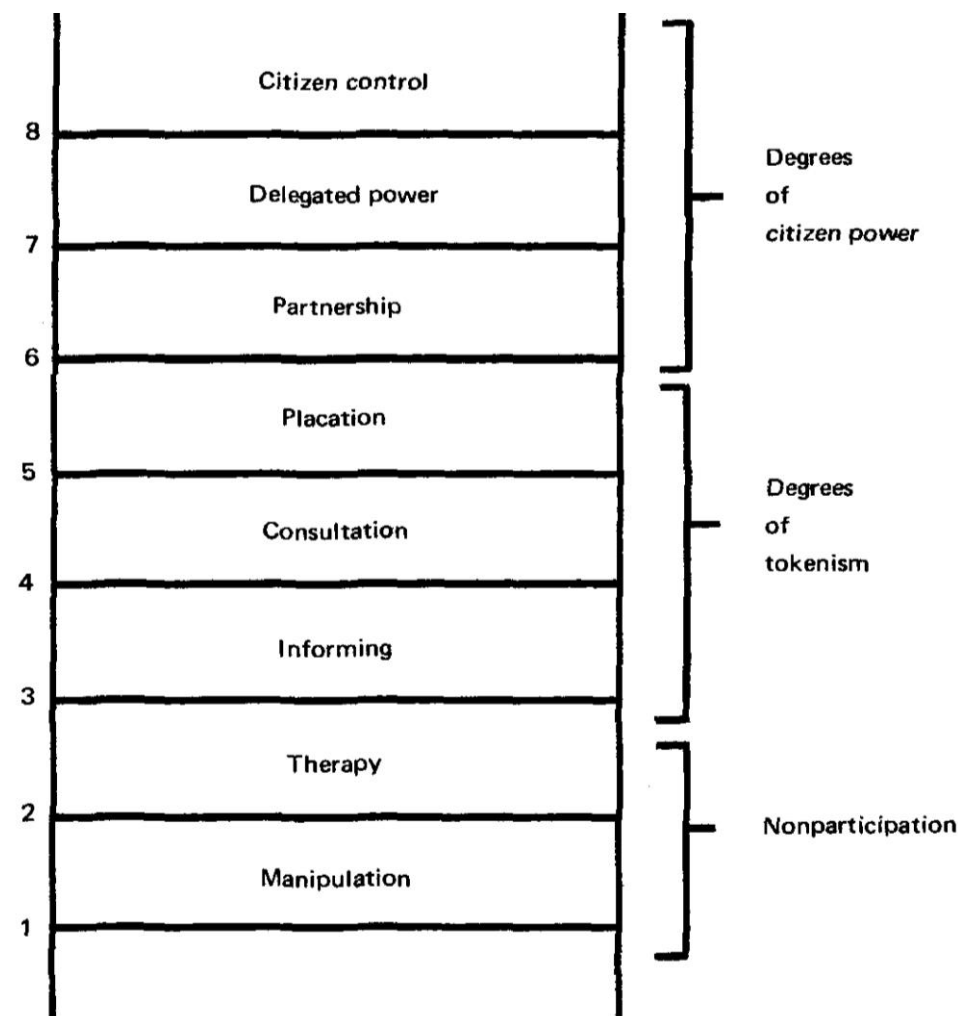
[36] In comparison, interestingly, ARNSTEIN's model accounts also for the cases of pseudo-consultation: Substitute methods that rather aim to "*cure*" or "*educate*" participants to support the "*powerholders*"' ambitions. Besides this bottom stage of actual "*Nonparticipation*", the degrees of informing, consulting, and "*placation*" represent a "*tokenism*" – processes that give citizens "[…] *no assurance of changing the status quo*". Only after an actual partnership has redistributed the planning and decision-making responsibilities and powers does ARNSTEIN speak of "*citizen power*" and an equilateral involvement.

Figure 4: ARNSTEIN's ladder of citizen participation (1969, p. 217)

In total, and as WHEELER et al. argue (2013, p. 17), it can be perpetuated that there is *no single way of citizen engagement, but a plurality of degrees*, each with differing requirements and implications. Primarily, more empowered engagement of the public demands more governmental effort, resources, as well as risks and responsibilities[37]. Similarly, however, citizen need to be aware of the consumption of their time and added responsibilities, when engaging more thoroughly. WOOLNER et al. describe an ILSD case (2007, p. 241), where school teachers eventually had to abandon a highly innovative and iterative collaboration design process, because the inclusion of the physical changes and the experimentation with new options of pedagogies drained their time and energies from actual teaching. As the literature review revealed above, methodical decisions require a rational dimension, in order to prevent capacity overruns, as well as an instrumental one, to ensure that the method of engagement sparks stakeholder's interest and buy-in.
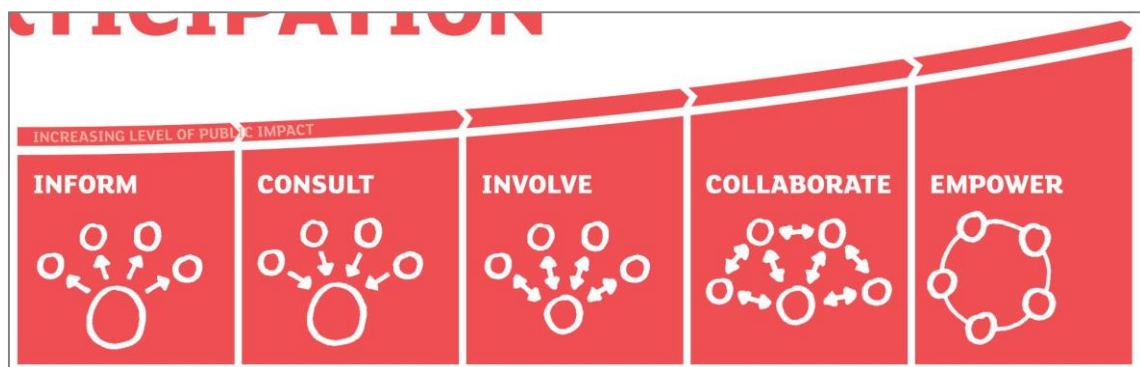


Figure 5: IPA2's 'Spectrum of Public Participation' in a simplified visualization of the CITY OF VANCOUVER (2014, p. 13).

### 2.4.3  Evaluating the discussed Planning and Engagement Models

As a conclusion, the challenge to planning for stakeholder interactions lies in identifying and executing an *optimum degree of engagement*, which aligns with the situational demand and context, while generating more mutual benefits than costs and uncertainty for each party. However, similar to ILSD, none of the above models of ECUD planning and engagement can fully describe the complexity in deducing such an optimum.

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[37] Only *informing* the public on government plans imposes next to no costs and time constrains, while a learning city committee (assuming a partnership/collaboration level) requires funding, hosting, management, and a consideration of its output. The more effective influence is granted to participants, the more commitment is demanded of governments to act accordingly and follow up on the resulting recommendations. Failure to do so may reduce the participative ambitions to ARNSTEIN's placation level (1969, p. 217), and thus affect public trust.

Instead, the planning models appear to treat stakeholder interactions like a 'black-box': They recommend only a limited set of approaches, or assume that the project owner already has a plan about how to engage the network and partners. Conversely, the models of citizen engagement may map a holistic spectrum of engagement methods, but they give limited guidance on how to identify and initiate the optimal one for a given local case. (The model of IAP2 (2007) is a good basis, however.)

The consequence of this shortcoming of the literature is that practitioners – unless they insource an *external expert* to facilitate the process – may assume only a limited set of methods to plan and interact with stakeholders. This could result in a suboptimal stakeholder selection and involvement processes, which may thus lead to the very inter-action issues that the introduction describes. While the validity of this conclusion is questionable, since the literature shows no accounts of such planning shortcomings, the findings suggest nonetheless that future research would help practitioners substantially by *aggregating* the various options that are available to realize optimal stakeholder involvement in ECUD and ILSD planning.

# 3    Key Themes in Stakeholder Interaction

## 3.1    Language and Concept Communication

Despite a thorough coverage of ILSD and ECUD in literature, their concepts and terminology appear to have unclear definitions, both in scientific communication (LONGWORTH 2006b, pp. 5–6; VOLKMANN, STANG 2015, pp. 237–239)[38], and on practical grounds. One of the most critical voices citied is YARNIT (2011), proposing that the LCR may be "*Dead as a Dodo*", as Learning Cities appear and disappear, independent of the title 'Learning City' or the framework being used at all. This gives the impression that the international research ambitions have had no viable impact on the thriving of LCRs. YARNIT points towards a strong variance in language and communication between researchers and teachers versus the public, decision-makers and economists. Stakeholders lacking understanding of learning may not comprehend the interrelations of space and networked education. Respectively and moreover, a too abstract or theoretic vocabulary may deter buy-in to the LEL vision, or spark misleading expectations.

This is especially enhanced by a divide between the scientific and the lay community: A decade ago, LONGWORTH wrote that

> "[…] *the essence of the debate still lies largely in the hands of a handful of committed educationists and politicians, who are by definition, remote from the real chalk-face of learning as it is currently delivered.*" (2006b, p. 83)

This may, first of all, explain why only "[…] *few educators are aware of the principles of lifelong learning, and even less the concept of learning cities and regions*" (LONGWORTH 2006b, p. 138). Moreover, however, LONGWORTH's judgement suggests that a *top-down definition of vocabulary* may fail to connect to those who the concepts are supposed to serve and benefit. Essentially,

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[38] The ideas of LCRs and modern LELs vary between regions, research hubs, and institutional discourses. The context of what learning theory and pedagogy is applied has consequences (Wilson 2014, p. 81): While the argument for learning theory to be integrated in the collaborative process is now widespread, there has been a critical stance towards the connection of learning and the relevance of local environments. Eventually, however, co-location is identified as an important factor that can spur lifelong learning (RUTTEN, BOEKEMA 2012, pp. 983–986; WILSON 2014, pp. 83–84; BILANDZIC, FOTH 2015, pp. 4–5; HEALY, MORGAN 2012). Regarding scientific research, language and variance of the vocabulary may inhibit a global sharing culture, as well as the retrievability of published cases and experiences. Here, the ILSD discourses are influenced by regional imperatives, while the stronger networked approach of ECUD resulted in global networks that enable an exchange of knowledge (WATSON, WU 2015, pp. 9–11; JORDAN et al. 2014, p. 275; LONGWORTH [2014b], p. 13).

> *"[…] the language and practice of 'learning' places has limited appeal be-*
> *yond educationalists, and has become an end in itself, rather than a re-*
> *source for focusing on fundamental issues related to urbanisation, carbon*
> *dependency and equity."* (WILSON 2014, p. 81)

This uncertainty becomes critical when the consent of politicians or local key partners is required: If the vocabulary of ILSD and ECUD cannot swiftly convey its pedagogic value, the practical consequences, and the prospective the socio-economic benefit, gaining support can turn out difficult.

In a holistic and pragmatic sense, citizen or users, administrators or staff, teachers, and designers or consultants simply have *different languages and assumptions* of learning, and may require different ways to be communicated with. (For example, librarians typically expect silence in their facilities; cooperating with or merging institutions demands opening up this standpoint, as in the case of Trier, Germany (BRANDT, MAAS 2015, p. 22).) Their understanding of and language for learning may be so fundamentally diverse that it is advised to include *learning theory building* into the planning process (ROOK et al. 2015, pp. 17–18). The result could be a common definition of terms, such as shared in CUNNINGHAM et al. (2014).

Eventually, this *collective building of understanding* can turn out very selectively and individually. It is, for instance, advised only to hire only architects, who are willing and committed to intellectually and collaboratively engage in the discussion of what learning means and how it relates to design (ECKART et al. 2012). Even with the best will and intentions, a critical and self-reflective mindset is required of them (SVETOFT 2009, p. 287). As the abovementioned rebuilding of the Laboratory School Campus at the University of Chicago shows, where the architect was involved in daily school operations to develop an direct understanding of the local learning (VALERIO DEWALT TRAIN ASSOCIATES, FMG ARCHITECTS 2011, P. 3), overcoming language divides in planning can be essential to ensuring successful outcomes and designs. In general terms, especially the ILSD literature is advising to focus on facilitating a constant and iterative dialogue between stakeholders (WOOLNER et al. 2007, p. 246; SUNGA, HEPWORTH 2013, p. 40; LAITINEN 2015, pp. 37–38), where

> "[…] *definitions and boundaries can be constantly tested, and pushed, to*
> *ensure that the learning space is what is needed to achieve the learning*
> *goals. Setting the boundaries allows the team to focus the discussion, de-*
> *fine common terms, and set the parameters within which it will work. Doing*
> *so also provides a common language for explaining the space to those*
> *outside the project."* (JOHNSON, LOMAS 2005, p. 24)

## 3.2   Leadership

Although MAGERUM's study among collaborative planning cases finds leadership only to be a mediocre issue (2002, p. 241), it is expressed as one of the most prominent discrepancies in the literature research. While many publications do not explicitly state a definition of leadership[39], they align in the values attributed to them, as the discussion shall show. Fundamentally, the issue of leadership is given rise due to the strong dependency on individuals among ILSD and ECUD (JOHNSON, LOMAS 2005, pp. 22–23; LONGWORTH 2006b, p. 163; TIPPELT et al. 2014, p. 67; SCHÄFFTER 2004, p. 33). Eventually, the idea of changing the LEL is initiated by individuals, be it 'outsiders', who have to win the support of managers of relevant institutions or politicians, or be it the latter, who have to convince their superiors, colleagues, and staff. Accomplishing to activate the first advocates can be an enormous challenge (WHEELER et al. 2013, p. 40; LAITINEN 2015, p. 40; DUKE 2012, pp. 834–835).

Beyond initiating and engaging stakeholders, leadership is also expressed as a missing quality during collaborative processes. Surprisingly, however, a lack of organizational leadership in terms of *guidance and vision* results in an even *stronger* attachment to individuals (MARGERUM 2002, p. 247), who are believed to champion the issue. This indicates a twofold need for leadership in terms of *project owners demonstrating commitment and guidance*, as well as *stakeholder representatives* and champions consistently working to open up the traditional silo structures of the former and their applied participation practices (MARGERUM 2002, pp. 247–248), while taking sides with those actually in need (WHEELER et al. 2013, p. 10).

These requirements call for *human capacity building* and *leadership training* for both, fountain figures and trusted facilitators of the process (MARGERUM 2002, p. 251; STENVALL et al. 2010, pp. 143–161), as well as for an empowerment of bottom-up initiators across sectors (LONGWORTH 2006b, p. 163). This capacity building is depending on a stakeholder selection process, which additionally identifies leadership potential in the communities. Thereafter, a training program needs to secure buy-in from these individuals, while empowering their leadership and networking competences (LONGWORTH 2006b, pp. 164–165).

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[39] LAITINEN, for instance, explores Heifetz' leadership principles within the scope of "*relation over authority*" and organizational learning (2015, p. 40). He especially points out the relevance of "*adaptive leadership*", as a way to respond to "*wicked problems*" while "*changing the rules of the game*". Waterhouse et al. look rather at the question of successful community collaboration and identify Falk's and Mulford's "*situated enabling*" as a suitable term (Kilpatrick in WATERHOUSE et al. 2006, p. 12).

The most vital leadership skills and values that have to be fostered, according to SENVALL et al. (2010, pp. 143–161), LANDRY (2008, pp. 108–110), TIPPELT et al. (2014, p. 75), LATINEN (2015), WATERHOUSE et al. (2006, p. 12), and BROOKFIELD (2012, pp. 881–882), begin with the capacity to act as a *networker and mediator* to connect across institutional, mental, and capacity barriers. Within this continuous[40], relational role, trust and commitment have to be enabled, while the leader needs to maintain resilient in taking risks and challenge entrenched positions. Such ambitious traits demand self-confidence, which is usually preventing individuals from engaging in learning in the first place (LONGWORTH 2006b, p. 66). Besides embodying the creativity and innovativeness of a problem-solver, striving towards a set (collective) goal and vision, the ideal LCR leader has also a holistic awareness of the other parties involved, and shares knowledge, information, and learnings, and is thus regarded as 'authentic', with no hidden agendas. In turn, if the LCR movement is to grow, this leader empowers others by delegating responsibility, and giving others the opportunity to decide and to lead. If this 'tipping point' of leadership behaviour is reached, the LCR has made a crucial step towards sustainable human capacities, and is able to change organizational (GOLDSMITH, EGGERS 2004, pp. 159–160; JOHNSON 2010, p. 572f.) or civic learning cultures, such as demonstrated by the city of Gwydir (WHEELER et al. 2013, pp. 29–31).

## 3.3   Becoming Learning Organizations (LO)

Now that the role of *individuals* in LCRs is explored, what are the *organizational demands* from education institutions and stakeholders, in order to qualify as mutual actors and collaborators in LCRs? Erasing silo-structures and inward-looking attitudes for networked learning may require a complete change of organizational culture (SCHÄFFTER 2004, pp. 32–33). From a critical lens of BAUMHEIER and WARSEWA (2010), given that some formal education institutions have been resistant to change (in both, space and

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[40] The role of leadership does indeed not vanish, when the network has been established. This sense of continuity becomes apparent from WHEELER's and WONG's set of critical success factors of leadership in learning communities (2013, p. 5):

- "*Passionate leaders from the community with the right skills are actively working to drive the learning community.*
- *High profile champions from within the community and/or government are working to advocate and link to funding opportunities.*
- *While partners are responsible for the leadership and delivery of the project, there is delegated accountability for outcomes.*
- *A succession plan is in place.*"

pedagogy) for decades, if not centuries, *how do these learn to change on an organizational level, in order to become proactive network anchors, led through a respective organizational culture?*

BAUMHEIER and WARSEWA (2010) argue that an institution, which attempts to integrate its community has to be integrated *itself*. They address, on one hand, the spatial integration in the community, such as through community schools or neighbourhood centres, but the organizational culture and structure has to match that community, and in essence, anyone desiring to activate lifelong learning in others has to be a lifelong learner herself (LANDRY 2008, pp. 113–117). Hence and ideally, every stakeholder of an organized LEL has to become a '*learning organization*' (LO) before becoming active participant of the LCR.

The characteristics of a LO are relatively diverse, and publications within ILSD and ECUD tend to focus on the aspects that suit their scope. LONGWORTH (2006b, p. 28) summarizes these characteristics as features of an organizational culture, which is self-assessing and improving performance by setting the learning of the employees in the center; in turn, this focus affects a shared vision of organizational development, and investments in education and training programs. The expected result is a culture of constant learning, sharing, and thus of innovation, enhanced responsiveness, and agility.

The peculiarity of this description is that it strongly mimics the characteristics of a LCR. Although an overlapping of vocabulary cannot verify a correspondence, there has been discussion connecting education networks and LOs (DOLLHAUSEN 2007a), where even the rather managerial aspects have a similarity (HARTKEMEYER 2007). Moreover, the concept similarly overlaps with the interfaces, where leadership becomes crucial for LCRs: providing guidance and visionary direction, and engaging and empowering stakeholders. These cohesions can be observed, for example, in Gwydir Learning Region, New South Wales. As a result of a top-down initiative,

> "*[…] it has been a staged development to build this culture, first building a model of a learning organisation within council and then developing a coalition of stakeholders from across community, business and education.* […] *The CEO thought he could make an immediate impact by addressing the lack of literacy, numeracy and educational achievement within his own staff. This has had a ripple effect into the community. The Mayor noted that this has given people 'a sense of the future and knowledge that you can climb the ladder within the organisation.'*" (WHEELER et al. 2013, pp. 29–31)

This account indeed suggests a deliberate, synergetic, and dynamic connection between LOs and LCRs. Generalized, this means that resourceful organization begin by integrating an internal learning culture; they then use the accumulated human capacities to establish a network and empower their stakeholders to become LOs[41] (VALDES-COTERA 2015, p. 7), in turn. The case is particularly interesting because a thoroughly embedded learning culture might help managing organizations overcome the usual barriers of "*short-term political culture*" and commitment, combined with unclear information flows (MARGERUM 2002, pp. 247–248).

Critical for such information flows through is a similarly integrated culture of *sharing* tacit knowledge and learning (BRANDSTETTER et al. 2006, p. 8; WILSON 2010, p. 131). A sharing culture shapes a creative and innovative network of organizations, which helps solve mutual challenges (LAITINEN 2015, p. 52), while expanding distributed product portfolios, and thus lever the impact of the LEL. Regarding the latter, LAITINEN (2015, pp. 37–38), for example, demonstrates the Finnish reform towards 'open public service design' – an attempt to build ongoing, interactive "[…] *processes where end users become service designers, service co-producers and assessor* […] su*pported by open data and information flow.*" The applied "[…] *design principles of transparency, participation, collaboration and the context of technology* […]", in turn, reflect the essence of '*Design Thinking*'[42] (IDEO 2014, pp. 9–10), a habitual framework to iteratively co-create services with customers and citizen, integrated in the staff's modus operandi. Such frameworks may take time (LAITINEN 2015, p. 52; CAVAYE et al. 2013, p. 605), but also represent the vital *bottom-up* interface to customers and citizen, opening up a dialogue between the LO and the outside. If such frameworks and services are routinized, backed up with the synergetic culture, they become the first concrete step of a LO into changing the LEL (SUNGA, HEPWORTH 2013, pp. 32–39).

The emergence of these processes and cultures may require a critical assessment of the existing organization. LAITINEN demonstrates the stark contrast between Finnish technical and welfare public administration departments, which perceived the change

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[41] Given the likelihood that diverse stakeholders may have varying motivations or reservations to join an education network or become a learning organization (JUCEVICIENE 2010, p. 425). A key agent, spearheading the culture, thus becomes a viable role model to follow.

[42] Despite the name, design thinking is not exclusive to ILSD, but takes the aspect of prototyping and collaboration, in order to yield services and designs that appeal to customers. Concerning ILSD and organizational learning, SVETOFT argues for a vital connection between the latter and architecture, because of the enhanced feedback mechanisms, and the possibility to even question and improve the routines and collaboration methods applied (2009, p. 289). This method of 'adaptive management' is a crucial component of NG to steer progress (GOLDSMITH, EGGERS 2004, pp. 150–151).

management from closed to 'open systems' very differently (2015, p. 51). FLORIDA's requirements for *creative* cities (2003) – tolerance, diversity, and openness – could provide viable indicators for both urban and organizational cultures.

Fundamental to the empowerment of staff is a c*lear HR and talent development strategy*, which seeks to develop full employee potential. Innovative and entrepreneurial behavior – important to enable community engagement (SUNGA, HEPWORTH 2013, pp. 44–45) – can be fostered by a breaking up internal structures to allow more creative careers and development paths of staff (DOLLHAUSEN 2007b, p. 6f.; LANDRY 2008, pp. 113–117). In detail, this can mean differentiating, broadening, or rotating tasks and responsibilities among staff, while also challenging and engaging them in work that links the internal organizational ends, so that a networked thinking establishes and a holistic sense of interconnectedness is born[43]. If such methods flourish, building external collaborations might be more welcomed internally and the interactions can be more fruitful.

## 3.4 Process Facilitation

Summing up the major bottle necks of ECUD and ILSD, the demand for managerial know-how and a controlled participative process becomes evident. Across institutions and territory, even successful projects face deficits in stakeholder and project management (ECKART et al. 2012; MARMOT 2014; VAN DER ZANDEN 2015; GOLDSMITH, EGGERS 2004, p. 128). This challenges project owners or governments, which have never before operated within NG, to deliver an expertise of facilitation usually alien to them (BAUMHEIER, WARSEWA 2010; GOLDSMITH, EGGERS 2004, p. 151; MARGERUM 2002, pp. 244–247; METAXIOTIS, ERGAZAKIS 2008, pp. 145–146). Expanding the inclusive planning processes by including more groups or by enhancing the degree of participation, increases the demand for coordinated trust and consent, interaction and communication (GOLDSMITH, EGGERS 2004, p. 22; METAXIOTIS, ERGAZAKIS 2008, p. 143). Fostering trust capital and aligning change management with the learning vision becomes a managerial challenge (STENVALL et al. 2010, pp. 143–161).

The similarity of these responsibilities with the above leadership discussion demonstrates that it parallels with facilitation, and suggests interdependencies. While project

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[43] In this process, again, the parallels with LCR leadership, in terms of guidance and empowerment, are visible; moreover, even the analytical and preparatory components, such as discovered as a necessarily thorough 'stakeholder selection' process, become applicable (LEPOLUOTO 2012): Talent levels and deficits have to be surveyed and discovered, and thus transformed into long-term learning goals, aligning with a learning strategies, mentoring programs, and peer-learning techniques.

owners and local governments have to show leadership, leaders need to possess network management skills that enable top-down facilitation (GOLDSMITH, EGGERS 2004, pp. 159–160). Arguably, these competences encompass more than simply 'checklist'-knowledge; networking and incremental processes call for adaptive management capacities, which steer resources and outcomes towards realistic goals through constant feedback, evaluation, and self-optimation (LAITINEN 2015, p. 52; GOLDSMITH, EGGERS 2004, pp. 150–151). Such synergetic agility may be learned from trainings and workshops only to a limited degree. Instead, the option of contracting external and independent facilitators can be beneficial. Nevertheless, continuous training for those involved in decision-making and consensus processes is vital.

External facilitators have been exposed to various project situations before and can draw from a far wider array of experience. Due to their outside position, they may spot and counter conflicts *before* they surface, which keeps the collaboration balanced and levers communication (GOLDSMITH, EGGERS 2004, p. 106; MARGERUM 2002, p. 251). In the merging of the Martin Luther King Jr. Library at San Jose State, California, the external project managers and consultants played a crucial role in maintaining a neutral outlook aligned to the project timeline while supplying specialist expertise (PETERSON 2004). Differing opinions among staff of the two original institutions was tackled by extensive participative behavioral research and small working groups with newly trained team leads. This resulted in increased mutual understanding on interpersonal level, as well as on service level, and yielded in an immense variety of co-created policy and service recommendations. This case aligns with the ideas of LOs and emphasizes investing in staff to foster facilitation skills in order to lead change management processes from within.

Particularly regarding ILSD, facilitation training for design managers and architects is similarly stressed as a deficit (SEBASTIAN, PRINS 2009, pp. 114–115). From their own perspective, architects *also* assume the role of the facilitator and guide, among others (SVETOFT 2009, pp. 285–286), which craves for training and empowered social skills, away from a purely aesthetic focus to an enrichment of creativity. The other way around, collaborative design processes may see potential in selecting creative project staff to facilitate in specific roles, as it happened in the case of Seattle public library (SKOT-HANSEN et al. 2013, p. 10), but there is also the notion of only making use of architects for solely taking design briefs further and not participating as a source of creativity (JOHNSON, LOMAS 2005, pp. 22–23; CUNNINGHAM et al. 2014)

As the above discussion shows, facilitation and project coordination, in the form of organizational, individual, or external capacities, play an essential role in ILSD and

ECUD. Enhancing consensus finding, communication, and stakeholder commitment are found to be the most important success factors in collaborative planning (MARGERUM 2002, p. 241) – all of which can be influences by effective coordination. Despite dependencies on investment, coordination and facilitation is a viable success criteria itself, which may lead to offsetting costs associated with networking, eventually (GOLDSMITH, EGGERS 2004, p. 128).

## 3.5    Funding and Resources

Resourceful capital is mentioned as a crucial factor for the sustainability of ILSD and ECUD (JUCEVICIENE 2010, p. 429; TIPPELT et al. 2014, pp. 73–74; SUNGA, HEPWORTH 2013, p. 41). However, the usually limited resources and funding restrict the options of project owners in supporting and maintaining stakeholder interactions. Especially at the interface of (conflict) coordination and external facilitation, a lack of capital is cited to be the most widespread inhibitor of collaboration (MARGERUM 2002, pp. 245–246). This is commonly caused by short-term or only one-time funding, and a failure to understand the long-term implication of networked education landscapes (WATERHOUSE et al. 2006, pp. 17–20) or the need for investment that covers learning spaces' maintenance costs (ECKART et al. 2012). Evident lack of capital or only the sheer prospect on funding termination can induce uncertainty among stakeholders, and thus deter trust, and long-term commitment (MARGERUM 2002, pp. 244–247). Even with secured funding, the cost distributions (VALDES-COTERA 2015, p. 9) and responsibilities can cause conflict, whereas unevenly distributed capital among stakeholders raises bias and control questions (MARGERUM 2002, pp. 245–246; PETERSON 2004, p. 38).

In general, networks and partnerships themselves may already impose a solution to funding limitation. When the LEL and network activity is stretched beyond the usual environment of education, more potential sources of funding may appear, while controlling and accountability have to keep pace (HARRISON, HUTTON 2014, p. 8; BRANDSTETTER et al. 2006, pp. 7–8; VALDES-COTERA 2015, p. 9). As an example, the Martin Luther King Jr. Library of San Jose State, California, was able to activate city investment, because it partnered and merged with the public library, administered by the city (PETERSON 2004, p. 32). Thus, bringing together various stakeholder does not just create a pool of human capital and expertise, but also their financial capital (WHEELER et al. 2013, pp. 14–15; TIPPELT et al. 2014, pp. 67–68).

Moreover, even where partners do not possess large financial assets or political leverage, the sheer combination of service and estate capacities provides a multitude of

opportunities for cost savings. For instance, the spatial integration of education institutions is commonly cited to reduce infrastructural and maintenance costs, sometimes leading to the continuity of institutions, which would otherwise have been closed down (STANG 2011). As a creative example, BAUMHEIER and WARSEWA report on innovative European schools, tapping into public-private partnerships in order to experiment with infrastructure arrangements in clustered school buildings (2010). These examples, again, advocate a thorough resource assessment among the prospective network, prior to engagement.

Although education networks may find alternative ways to attain financial sustainability, securing long-term funding remains crucial. Thus, funding proposals and programs have to be designed in a sustainable form, already. This demands he inclusion of critical assessment during collaborative service and design planning (BAUMHEIER, WARSEWA 2010). On the other side, attaining funding is linked to lobbying and fundraising. Here,

> *"Cultural and attitudinal change is needed for funders and others to understand and value the time involved in realizing the outcomes of community initiatives such as learning communities."* (CAVAYE et al. 2013, p. 605)

## 3.6 Long Time Periods in Planning and beyond

Throughout the various discussions, the element of *time* and is frequently mentioned as an inhibitor of collaborative processes, in general (MARGERUM 2002, pp. 245–246), as well as specifically for ILSD (JOHNSON, LOMAS 2005) and ECUD (LONGWORTH [2014b], p. 3). Compared to traditional urban planning and architectural briefing, collaborative processes and community engagement simply require more time to be planned, initiated, and carried out (WHEELER et al. 2013, pp. 14–15; SVETOFT 2009, p. 288; SCOTT-WATSON 2008, p. 4; WHEELER, WONG 2013; BUISKOOL et al. 2005, p. 202). Moreover, changes in the LEL may require a long time until they show intended learning effects among the community and target groups (GOLDSMITH, EGGERS 2004, p. 145; LAITINEN 2015, p. 52). At the same time, such long-term ambitions can easily be undermined by changing political culture and direction (LONGWORTH [2014b], p. 3).

Primarily, issues regarding timing surface due to traditional and conservative expectations and planning. Fundamentally, vastly different stakeholder groups have also varying behaviors and approaches to timing, as a contrast between educators and the private sector shows (WATERHOUSE et al. 2006, pp. 29–30). Moreover, lacking experience with participatory methods leaves stakeholders without proper sensing for setting appropriate deadlines or estimations. As a result, project time-line overrun and scope-creep

may appear and negatively affect the continuity of networked efforts and impacts, as stakeholders may become disappointed due to unfulfilled expectations. Re-planning and resetting goals and time-lines may be additionally critical, because the investments into the LEL can or did not yet demonstrate a (measurable) impact. As such, politics and funders could be deterred to renew their support.

This scenario illustrates the critical necessity for *long-term planning*. It validates the unique value of external facilitators or specialists, who bring in essential expertise and insights that can identify integral planning misassumptions in the early stages already. From a networked perspective, a well engaged consulting process may lead to similar critical discoveries (CARE 2015, p. 129); if a wide range of stakeholders is consulted or even thoroughly engaged in setting the project framework, their various backgrounds and views can similarly readjust or inform a realistic plan; internally, a through and empowered learning organization and -culture can do the same for individual institution (GOLDSMITH, EGGERS 2004, pp. 150–151).

Moreover, the discussion points towards the importance of *realistic goals and time-lines* (BAUMHEIER, WARSEWA 2010). Too ambitious goals may not only reduce buy-in and the chances of total achievement, but smaller and more quickly attainable goals boost motivation and open up perspectives for further activity, once achieved. Besides planning key actions to reach these goals, evaluation and tracking measures have to be in place (GOLDSMITH, EGGERS 2004, p. 145). 'Learning' is only the means to achieve a greater impact for the learners, and thus, this impact has to be put into indicators. These should ideally not just provide information when the project has been delivered, but can be measured already throughout the process, to inform and direct the course of the original plan (MCCHESNEY et al. 2012). Put into a practical context, WHEELER and WONG have conceptualized a guiding life cycle of learning communities, based on the three phases '*Establishment, Consolidation, and Enhancement*' of the education network (2013, p. 4). They attribute an estimated duration of *three to five years to each phase* (2013, p. 3), and give sample reflective questions (of qualitative type) as a constant means of evaluation. Deduced from their framework, only after minimum six years (upon entering the 'Enhancement' phase) do they recommend the assessment of the success of the network for its continuation or abortion. More concretely formulated,

> *"The timeframe of fundamental community change involving learning communities is approximately 5–15 years. However, evaluation is often determined by funding periods that are much shorter, often 1–3 years."* (CAVAYE et al. 2013, p. 601)

In order to spark a sensibility for the need for unconventional estimations and realistic planning, the *communication strategy* has to account for it (CAVAYE et al. 2013, p. 605). Politicians need to know that they may not see impactful results in their term, even if the physical infrastructure of the LEL has been altered (e.g. a new library has been built). Partners and participants have to understand how time-consuming collaboration can be, and how this may affect their everyday routines (WOOLNER et al. 2007, p. 246). Clear expectations have to be set with the network on when its members can expect their collaborative efforts to start making a difference. Only if stakeholders have internalized the experimental and uncertain nature of impacting community well-being through learning can they actively contribute in planning to avoid future time-line overruns.

# 4    Case Study: Hume Global Learning Village (HGLV) and the Global Learning Center (HGLC)

> "[…] *in 2003, Hume, a suburb of Western Melbourne with a highly multicultural community[44], began the creation of the 'Hume Global Learning Village', an innovative new partnership linking organisations connected with learning from around the city and beyond.*" (LONGWORTH 2006b, p. 185)

The respective (historic) demographic challenges of the municipality (KEARNS 2011, p. 18), the "[…] *lower levels of educational attainment* […]" (WHEELER et al. 2013, p. 35), and the ineffective interventions of the local government[45] led Frank MCGUIRE (formerly journalist, then local, and eventually national politician) to the inception of the education network (MCGUIRE 2011). During the first years, the 'Village'[46] grew to include

> "[…] *five libraries and the mobile library, local schools, seven neighbourhood learning centres (one donated by the Visy Cares Recycling Corporation), six neighbourhood houses, the Kangan Batman TAFE (college), local businesses and Victoria University. All of these facilities and sponsors, as well as some other 300 associations and individuals, are members of the Learning Village – the hub of which is a purpose-built community centre/library, the Hume Global Learning Centre.* (FARIS 2006, p. 28)

The fundamental idea was and is to foster partnerships that "[…] *provide non-formal learning opportunities through the learning support activities that happen within the Hume Global Learning Centre[47] and the network of libraries.*" (PHILLIPS et al. 2005, p. 26) By "[…] *using learning as a strategy for change* […]" (WHEELER et al. 2013, p. 9), the basis for these partnerships was a strategic mid-term plan, which defined local issues

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[44] Despite its proximity to Melbourne (which itself has taken the path of a KN (YIGITCANLAR et al. 2008, pp. 70–71), Hume is affected by a strong cultural diversity as a result of high fluctuation and immigration. Youth make up a large proportion of the population, but performs low on educational comparisons. Conversely, the area is expected to grow to a population of 240000 until 2030 and holds a lot of potential to job opportunities (WHEELER, OSBORNE 2011, p. 535; KEARNS 2011, p. 18).

[45] "*His* [Frank McGuire's] *strategy was to usurp this law and order model that had previously built a bigger police station and court house in Broadmeadows but lacked the creativity to establish positive life-changing infrastructure – even a public library.*" (HGLV n.d.) Evidently, "*this was addressing the symptoms, not the causes […] The idea was to shift away from a* punitive *model to a* preventative *model.*" (WHEELER et al. 2013, p. 35)

[46] "*The driving principle is that it takes a village to raise a child, in the 21st Century that child will need to be globally connected*" (WHEELER et al. 2013, p. 34).

[47] The Learning Centre referred to is the one placed in the district *Broadmeadows*, which had never had a library for itself before.

that a NG approach could solve (LITTLE, DIXON [2006], p. 7). The realization of this plan relied "[…] *on the participation of many people and learning organisations in Hume* […]" (PHILLIPS et al. 2005, p. 11), while the local government maintained the role of a facilitator and enabler.

Throughout time, the network grew to

> "[…] *over 700 organisations with an interest in learning in Hume City, representing schools, neighbourhood houses, libraries, TAFE's, universities, council officers, job services providers, businesses, community and sporting groups, government departments; trainers, tutors and individuals.*"
> (WHEELER, OSBORNE 2011, p. 536)

The success of the process, of the learning impacts of the center[48] and the network, and of its overall sustainability has given the HGLV worldwide recognition as a good case practice example, which is advocated and spread by numerous reports, especially by Wheeler (PHILLIPS et al. 2005; WHEELER, OSBORNE 2011; WHEELER et al. 2009; WHEELER, WONG 2013; WHEELER et al. 2013; WHEELER, FARRELL 2011). In the following, the findings of these materials and the additional insights of the expert interviews are compared to the scopes of the six stakeholder and planning issues, identified from the literature review.

## 4.1   Concept and Language Issues and Solutions

To begin with the issue of *ambiguous concepts and language around ECUD*, it is little surprising that the idea of the HGLV and HGLC is often confused (VOLKMANN 2015a). In general, the "[…] *difficulty to explain the concepts* […]" was common among the stakeholders (WHEELER et al. 2013, p. 8). However, it is mentioned that

> "[…] *they were getting better at it. They were better at using practical on-the-ground messages that residents could relate to such as raising aspirations, pathways to learning and employment, active citizenship, adding value to existing education and training provision, and having a 'can do' attitude.*" (WHEELER et al. 2013, p. 8)

More concretely: "*The positive language used helping to highlight the opportunities that come from diverse communities, rather than focusing on deficits.*" (WHEELER et al.

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[48] "*The Global Learning Center has become a crucial social hub in a dispersed and disparate community. Library membership has substantially increased. Relationships and partnerships have developed with greater inclusion of marginalized groups in community life. The community has developed long-term strategic plans. An important school regeneration program has facilitated the redevelopment of schools.*" (CAVAYE et al. 2013, p. 604)

2013, p. 7) This quote pinpoints a critical difference of how ECUD was communicated internally and externally: the strategic focus on local issues was turned into a positive and opportunity-centred vocabulary. This "*strength-based approach*" was used by the HGLV "[…] *to describe the challenges faced and how these can be turned to opportunities for the future* […]" (WHEELER et al. 2013, p. 9). Vanessa LITTLE states furthermore, that the simplicity and the breadth of the Village's vision of attaining well-being for all was something that the vast heterogeneous, disadvantaged population could connect to (VOLKMANN 2016b).

However, 'positive language' appears to depend on other structural conditions. For instance, especially due to the multicultural composition of Hume, the translation of materials and communications into the respective languages ensured accessibility to the idea of the HGLV (WHEELER, FARRELL 2011), suggesting a coordinated public relation initiative. Moreover, as WHEELER and FARRELL state, the appeal to the public may not only depend on a strength-based formulation, but much more on a strength-based design of the collaborative services: The learning opportunities planned for have to make a difference for the target population, in the first place. Moreover, the HGLC acted as a crucial, physical beacon and symbol in an urban landscape, which otherwise would only reflect the disadvantage of the people (VOLKMANN 2016b).

In conclusion, the general conceptual discrepancy can be observed in the case of Hume. In response, the network found both structural, interconnected, and self-optimizing solutions to communicate the purpose and the opportunities of the HGLV more effectively over time. Moreover, though, individuals made an additional contribution to the clarity of concepts, concerning especially Frank MCGUIRE, the visionary leader and initiator, alongside with his brother and TV celebrity Eddie McGuire, but also the first manager of the Village, Vanessa LITTLE, and the library manager, Chris Kelly, who made the concepts graspable in their organization (VOLKMANN 2015a). This raises the relevance of leadership in HGLV.

## 4.2    Leadership

Leadership played and continues to play a most vital role in HGLV, although it's value is not attributed to a lack in leadership potential or capacity, but to an excess[49]. To begin with individual leadership, the role the initiator, *Frank MCGUIRE* is most notable. When he was asked by the City

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[49] Besides the herein mentioned McGuires and Vanessa LITTLE, the three interviews brought up about a dozen further names of individuals, who added invaluable contributions.

> *"to be the founding chairman of its Safe City Taskforce […] Frank accepted*
> *the position pro bono on the condition he remained independent and would*
> *run an agenda. That agenda was to establish the Global Learning Village"*
> (HGLV n.d.).

Franks approach to realizing the HGLV is reported to have been very bold and inspirational, while also unconventional and radical. As a former resident of Hume and the son of immigrants, his ambition was authentic; his background in journalism and studying community leadership gave him the required capacities. As a local politician, he approached other promising personalities to ask for support. As these allies continued to step up in their political career, so did their power to aid the HGLV. For instance,

> *"[…] The first politician I took the concept to was John Brumby when he*
> *was shadow Treasurer and the member of the Legislative Assembly for*
> *Broadmeadows. With Labor in power, Treasurer Brumby and Premier*
> *Steve Bracks backed this innovative strategy to help connect the discon-*
> *nected. When he rose to become Premier, John Brumby delivered the so-*
> *cial infrastructure denied to Broadmeadows for half a century and estab-*
> *lished its foundations for the future."* (MCGUIRE 2011)

This strategy ended up attracting funding support from the national government and strategic partnerships with local business, foundations, and key employers (WHEELER, OSBORNE 2011, p. 535); later on, MCGUIRE "[…] *attracted world leaders in information and communications technology Microsoft, Intel and Cisco Systems to establish the Ideas Lab to harness new technology for teaching and learning."* (MCGUIRE 2011).

As MCGUIRE continued to pursue a political path, his role as a connector, networker, and thought leader was continued by the "*General Manager, Learning Communities*" of the HGLV (PHILLIPS et al. 2005, p. 24) – Vanessa LITTLE –, however, with a stronger managerial focus on implementing the network – 'matching' the networks' supply and demand, as discussed by LONGWORTH (2006b, pp. 164–165) in the literature review, was her team's responsibility. In her own view, finding, selling and engaging the idea to key stakeholders among Hume was aided by the state of disadvantage in the municipality, so that people who decide to work in Hume would do so with good will and intentions (VOLKMANN 2016b). This eased the process of connecting with professionals and aligning them to the purpose of the vision. Moreover, the MCGUIRE brothers' leadership has acted as a multiplier among more high-profile stakeholders, for example regarding the

> *"very senior and well connected Hume Global Learning Village Advisory*
> *Board* […] *The chairman of the Village Advisory Board is a former premier*

> *of Victoria, with a known interest in education and social justice. His in-*
> *volvement and advocacy (along with the other members) adds credibility*
> *to the Village and facilitates access to funding sources, research and de-*
> *cision-makers."* (LITTLE, DIXON [2006], p. 10)

Besides individuals, leadership has become an organizational attribute*, as well.* The city council unites all ambitions and does so in a mediating and connecting role[50], given its "[…] *first hand experience and information about the local community, local busi-nesses, their needs and aspirations* […]" (LITTLE, DIXON [2006], p. 5). However, this happens "[…] *without perceived bias, but with credibility* […]" (PHILLIPS et al. 2005, p. 31), because the city council understands

> *"*[…] *that such a wide-ranging intervention cannot be successful if it is*
> *'managed' by the council. Rather, council is the 'enabling' body, with the*
> *Village establishing a vision, structure, representation and strategy.*" (LIT-
> TLE, DIXON [2006], p. 5)

Moreover, as LITTLE notes (VOLKMANN 2016b), the credibility from the council's role of the main driver and facilitator is also rooted in the Australian perception of local government, which is usually seen as a government *for* the people. In her opinion, formal education would not have had sufficient public support to drive the Village.

Eventually, the leadership role was downscaled from the city council to the HGLV itself, so that the network is managed and driven by the member committee itself, which, according to LITTLE, is quite a demanding transfer of power and trust (VOLKMANN 2016b). The 2010 concept of the Village describes it as a

> *"*[…] *leader and driver of Council's vision for Hume as a learning commu-*
> *nity. The Village is a partnership that empowers people to embrace learn-*
> *ing as a way of life in homes, community settings, educational institutions,*
> *and businesses of Hume."* (KEARNS 2011, p. 19)

In conclusion, the materials demonstrate a thorough presence of leadership in HGLV – in the planning phase, as well as beyond –, which is mentioned as a key success factor (PHILLIPS et al. 2005, p. 31; WHEELER et al. 2013, p. 40).

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[50] As important as this stewardship is addressed as WHEELER, FARRELL 2011, it similarly "'[…] *took enormous leadership to step into a space that was not traditionally a council role*, […]'" (The Director of Organisation and Community Learning in WHEELER et al. 2013, p. 38) which is the only account on leadership as a barrier.

## 4.3   The HGLV as a Learning Organization

Neither the document analysis nor the interview materials mention strong, intentional tendencies towards LOs in the HGLV network. While the presence of the Village and the centres did not seem to have changed organizational structures significantly, it appears that it was rather the role of individual who wanted to leave a legacy that led the path towards this goal and changed cultures (VOLKMANN 2016b). This individual approach appears to have been sufficient to give the Village a sustainable and self-driving momentum, so that developing LOs or cultures was not a priority.

However, an account of Ken THOMPSON (VOLKMANN 2016a), first Chair of the HGLV member committee, states that the committee had to begin with smaller activities and projects, in order to get the members used to collaboration. As a result, they discovered that a *sharing culture* was helping them to achieve more and thus proceeded in nurturing one. Another, but quite different account from the HGLC displays this ambiguity: Implemented by the first library manager, Chris Kelly, the library inside the HGLC took a pivotal role in implementing a culture of learning. In terms of internal identity with, and understanding of the HGLV concept, Kelly included the role of 'Learning Facilitators' in library staffs' job descriptions (VOLKMANN 2015a). This suggests that library staff responsibilities and capacities were in some way augmented to suit the network's goal of facilitating community engagement and learning, and possibly direct the HGLC's internal culture towards something akin to a learning culture. Indeed, the role "*learning facilitator*" may include an organizational shift from a service-led to a community-driven service, which would match the role that the centre is oftentimes attributed with in the reports.

## 4.4   Facilitation

The parallel occurrence of facilitation and leadership described in the literature review can also be found in the case of the HGLV. The network itself and the city council are mentioned as key facilitators of realizing networked lifelong learning, thus reflecting the structure of HGLV.

> *"Hume City Council's role as facilitator means that the administration of the Village is the responsibility of council staff. Staff of the Learning Community Department call meetings, keep minutes, arrange professional development opportunities for members, provide promotional opportunities for Village members' programs, and develop networking events. Hume staff act as a clearing house for information on programs, projects, funding*

*opportunities and professional development opportunities for Village members. The council staff act as the 'glue' that holds the Hume Global Learning Village together, enabling members to provide their expertise and time in such a way as to maximise their input and value, without the burden of organisational administration.[51]"* (LITTLE, DIXON [2006], p. 5)

*"Overseeing the operations of the Village is a committee of 15 people, representing the membership. They are nominated from within the membership and is the decision-making body for the Village. They ensure that the implementation of the Learning Together strategy is on track and consider opportunities for the Village. They are 'hands on' in the local community and provide practical advice to the council and Village Forum.* (LITTLE, DIXON [2006], p. 6)

In this structure, the HGLV is facilitating and sustaining itself. It is mentioned that the early decision for these structures, "*were important in giving direction to the implementation of the HGLV, and provided a framework to sustain the venture.*" (KEARNS 2011, p. 19)

Besides facilitating itself, HGLV displays highly coordinated and structured ambitions in facilitating community engagement in its projects. Throughout the planning and initiation of the Village, the pivotal source of facilitation was Vanessa LITTLE and her team of diversely skilled staff, all however with a background in networking (VOLKMANN 2016b). An actual documentation of a "*Community Engagement Framework and Planning Guide*" is only available since around 2012[52] (HUME CITY COUNCIL [2012]) – although with remarkable details. The municipal document aligns research in community engagement (such as the previously discussed model of IAP2 2007), local strategies and indicators with thorough and realistic instructions and planning procedures.

In short, the planning guide assumes that "[…] *the highest level of 'Empower' will rarely be achievable or appropriate. As elected representatives for the community, final decisions will ultimately rest with the elected Councillors.*" (HUME CITY COUNCIL [2012],

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[51] Vanessa LITTLE elaborates that the fact that her team and the council took over responsibility for "*the things that nobody wants to do*", such as newsletters, member databases, meeting facilitation, etc., allowed the members to focus on contributing constructively only (VOLKMANN 2016b).

[52] For earlier engagement initiatives, only the following reference could be retrieved: "*In 2004, Hume City Council undertook unprecedented levels of community engagement to develop the community s Hume City Plan 2030. As Hume Mayor, Councillor Adem Atmaca, explains, the engagement included distribution of brochures to all residents and organisations, household telephone surveys, the preparation of discussion papers, hosting 23 community forums and the involvement of all key stakeholders (businesses, clubs, schools and learning organisations, government agencies and volunteer groups).*" (HUMECITY 2006)

p. 9) It also assumes that the planning activities prior to starting the project will take considerable time in order to gather information to allow informed decisions of the project framework. The planning sequence itself begins with setting the objectives and boundaries of the engagement – vital, preliminary decisions on the power of decision making and non-negotiable details. Only then is a stakeholder analysis carried out, as LONGWORTH (2006b, pp. 164–165) and BUISKOOL (2005, p. 200) recommend. LONGWORTH's '*matching*' of supply and demand thus takes the form of *determining the appropriate level of impact and then engagement*. The Impact (or risk) of implementing a project is measured in three levels (high, medium, low)[53]. "*Once the level of impact has been determined, the IAP2 Spectrum of Public Participation can be utilised to determine the overall level of engagement required.*" (p. 11; see figure 6 below)



Figure 6: Hume engagement framework: Impact and engagement levels (HUME CITY COUNCIL [2012], p. 11)

The guide continues to list a comprehensive set of methods and tools of citizen engagement in the respective category, including a recommendation scheme. The planning terminates with the common project management considerations of timing, budgeting, reporting, feedback, as well as evaluation and monitoring. While the comprehensiveness of this document is remarkable, it demands a lot of preparation and thus time to be carried out. As the document states, HGLV aids this process by offering and training and learning infrastructure to its members (HUME CITY COUNCIL [2012], p. 8).

Beyond building *internal* capacities, the history of the Village shows that HGLV does not always rely on the former, and that the city council was not always chosen to facilitate critical points of planning: Especially strategy and evaluation procedures where guided

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[53] High impact or risk is defined as "[…] *any decision to create controversy and/or have varying levels of acceptance* […]"; medium as decisions that "[…] *decision may be an inconvenience for some sections of the community* […]"; and low as those that "[…] *will be widely accepted by the community* […]" (p. 14).

by external consultants, to supply new perspectives (PHILLIPS et al. 2005, p. 9, 15). Interestingly, only Ken THOMPSON reports that also Norman LONGWORTH and David MCNULTY, two influential researchers, also covered in the literature review, were having an invaluable initial advisory role in downscaling international best-practice (VOLKMANN 2016a). This confirms not just the guiding role of external consultants, but also the one of international networks.

## 4.5   Funding and Sustainability

The crucial contribution of individual leadership in forging strategic partnership to fund the HGLV is already suggested above. Frank MCGUIRE's initial successes included

> *"[…] Victorian State Government Departments, sponsorship by key business organisations located in the region, philanthropic organisations, and major nongovernment institutions […]"* (PHILLIPS et al. 2005, p. 25)

The HGLC was "[…] *funded by Council, with significant support from the Victorian Government's Community Support Fund, The Age newspaper; Ford Australia and the Pratt Foundation."* (PHILLIPS et al. 2005, p. 8) The case of the cooperation with the metropolitan newspaper *The Age* provides the most haptic information to illustrate the reciprocal relations of the HGLV and the company.

According to a case study of the partnership by the initial partnership managers (LITTLE, HENHAM n.d.), the company first sponsored the "*The Age Library*"; only later did a strategic partnership evolve, which combined the social responsibility scopes to foster collaborative community impact:

> *"The Age wanted to play a broader role in the community in the city of Hume where it had invested $220 million in a new printing plant in Tullamarine. […] Council could see substantial benefits in having such a major, prominent business and employer located in the City. The Age had already sponsored such activities as the Hume Business Breakfast. […] The Age saw excellent win/win opportunities for sponsorship of the library given the interest in encouraging reading and the centre's prominent positioning. […] While the relationship between The Age and the City of Hume commenced with a cash contribution to the establishment of the Hume Global Learning Centre, the relationship is dynamic and strategic."*

Without difficulties in collaboration, the co-ordinated initiatives included mentorship, learning programmes, and expertise to existing programs and HGLV marketing, or the access to print and electronic resources of *The Age* (LITTLE, DIXON [2006], p. 4).

> *"However both* [partnership managers] *detailed a range of discussions da-*
> *ting over a long period of time that laid the groundwork for the partnership.*
> *From this, the message is simple – solid and thorough planning early in*
> *the partnership is a must if you are to achieve top results."* (OUR COMMU-
> NITY n.d.)

The case study concludes "*That if the corporation is in it for the right reasons, and your*
*objectives and ethos are aligned, working together is easy and productive"* (LITTLE, HEN-
HAM n.d., p. 4), and provides a good example of how the corporate sector can be acti-
vated to sustain ECUD, using place-based partnerships based on corporate social re-
sponsibility (LONGWORTH 2006b, pp. 127–128; STANG 2011, pp. 32–34).

Since HGLV does not exclusively depend on external partnerships for funding, the
question of sustainability becomes a core concern from a structural and strategic per-
spective of planning. First, as the literature review assumes, HGLV is affected by the
discrepancy of short-term funding provision, and long period maintenance of activities
until impacts can be measured. Moreover,

> "*The large initial investment of time, resources and planning that has been*
> *made by employees of Hume City and its strategic partners warrants plan-*
> *ning into the sustainability of the Hume Global Learning Village over a long*
> *period of time. In this case sustainability is linked to the provision of re-*
> *sources by Hume City and its strategic partners for the continuation of the*
> *Hume Global Learning Village. It then becomes part of a long term strate-*
> *gic planning cycle."* (PHILLIPS et al. 2005, pp. 27–28)

As a result, strong network and partnership management, strategic inclusion of funding,
as well as succession planning (WHEELER, WONG 2013, p. 5) to ensure prolonged sup-
port throughout new election periods are measures of HGLV to develop sustainably.

## 4.6   Long Time Periods

Despite its strategic foundation (PHILLIPS et al. 2005, pp. 27–28; KEARNS 2011,
p. 19), the HGLV plan of Frank MCGUIRE was not unaffected by the long periods of time
attributed to ECUD. While there is no reference of any direct planning mistakes,

> "*There was some frustration at* [..] *not being able to deal with social issues*
> *on the ground in a timely manner, for example, youth disengagement. Too*
> *often a level of bureaucracy from other levels of government hindered pro-*
> *gress."* (WHEELER et al. 2013, p. 8)

Conversely, given these long processes, it became "[…] *difficult to attribute particular outcomes directly to learning community activities.*" (WHEELER et al. 2013, p. 8) This problem again interrelated with the issue of short-term funding, described above.

As the above example of the partnership planning with *The Age* shows, extensive investment in laying the "*groundwork*" was necessary (OUR COMMUNITY n.d.), despite their mutual understanding and common goals (LITTLE, HENHAM n.d.), which is usually attributed to time consuming partnership planning (WHEELER et al. 2013, pp. 14–15). To what extend this inhibitor applied also to other partnership is not visible from the materials. Spending an appropriate time to building relationships is still a key learning (WHEELER et al. 2013, p. 40).

In total, HGLV appears to have put the issue of longer durations within ECUD into its strategy and planning framework (HUME CITY COUNCIL [2012]; WHEELER et al. 2013, p. 7). LITTLE confirms, that the council indeed aided the process by believing in the long-term nature of the venture, and that they did not "[…] *expect change over night* […]" (VOLKMANN 2016b). Routinized in such a way, "*The Village has gone through two phases of generational change and the concept continues and adds value despite the changes in leadership.*" (WHEELER et al. 2013, p. 38)

# 5    Evaluation, Limitations, and Perspectives

## 5.1    Summary of the Case Study: The Dominant Theme of Leadership

Except partially for *LOs*, the six themes identified in the literature review could be found in the case of HGLV. Often, however, the positive findings could not be traced back to the original planning phases, but instead were additions and interventions that happened *after* the HGLV was already in place. Hence, the actual state of planning the education network is not evident from the above discussion. While this raises the question of validity – given the initial purpose of the thesis to assess the stakeholder interactions in the planning phase – the findings coincide with the general opinion that planning should be agile and a continuous process, as argued in ILSD cases (JENSEN, PEDERSEN 2009, p. 177; JOHNSON, LOMAS 2005, p. 24).

In total, the case of HGLV showcases vivid and interconnected success stories in planning and realizing a LCR. Among the six identified stakeholder-interaction-issue themes, especially *leadership* stands out as an attribute that is present in all themes and sometimes was crucial in enabling them. Leadership was strongly displayed by key personalities, who rose and multiplied a collective vision (starting with Frank MCGUIRE). In ensuring buy-in among politics (especially local government, regional, and national), as well as across sectors on a local and regional level, the network was instantiated in a top-down, NG approach (facilitated and funded by local government), while the driving and operative momentum was transferred to a community-driven and -sustained committee, consisting of network members (hence, a slight bottom-up empowerment).

Leadership helped especially in the usually problematic area of communicating the concept of a LCR; here, the clarity of the vision, and the high-profile advocacy was and still is vastly beneficial. Second, leadership, advocacy, and the strong buy in of local government and high-profiles secured funding from diverse levels and strategic partners. Third, leadership connected networks of diverse competency and prominence. The funding security allowed for broad application and insourcing of facilitation capacities. Fourth, leadership helped the present and sustainable structures to arise and shape them. As a result, leadership has contributed to a learning culture or mentality, even if this did not form LOs per say. Fifth and lastly, the buy-in and the capacities fostered through leadership broad with it (to some degree) a planning awareness of the long-term nature of an

LCR. The city council as a pivotal advocate of this long-term perspective is a major success. In conclusion, the case study suggests that sufficient leadership may outweigh deficits in the other areas.

Beyond the essence of leadership, the HGLV displayed two other important precondition for successful stakeholder interactions and collaboration, which agree with the literature review: First is the *simple and collective vision*, based on local issues that appeal to the diverse realities of the local population and can be solved through networked education provision; in this case: improving well-being for everyone through networked, nonformal learning opportunities. This element allowed for easy and broad communication, and connection to stakeholders of various types eased the communications. Second remarkable interaction feature is the emphasis that Hume puts on *festivals and events* the celebration of its diversity (HUME CITY COUNCIL n.d.), as advocated by VALDES-COTERA in the general literature (2015, p. 6). The enormous diversity allowed for a wide range of local events and festivals, which brings the various cultures together, to create cohesion among the communities and set lifelong-learning on the public agenda (PHILLIPS et al. 2005, p. 26).

## 5.2 General Evaluation of the Findings and the Document Analysis

Along the document analysis, especially the design planning of the *HGLC in Broadmeadows* remained obscure. In the expert interview, Vanessa LITTLE (Volkmann 2016b) described a few design outcomes, which turned out suboptimal[54], but she contrasts, that the design planning took place at a time where hardly any other experience or similar projects as the HGLC were present in Australia – as such, she states, the council and the architects, combined with a selective consultation of key stakeholders, simply had to rely on making the best decisions possible. Ken THOMPSON confirms that the architects were able to identify with the council's agenda and that the latter's leaders had a pivotal stake in the "*iconic*" and symbolic design of the centre (Volkmann 2016a).

In general, from the document materials, actual *stakeholder interactions* are only documented rarely. In a few cases, the interaction of individuals and organizations are described, but foremost, network partners are referred to as a homogenous group (the

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[54] One major design fault, for instance, was that the library was placed on the first floor, which reduced accessibility, and which was changed in the design of the second HGLC in Cragieburn.

'Village', the 'forum', or the 'council'), without mentioning internal dynamics[55], and the 'public' is not differentiated any further either. As a consequence, planning decisions are rarely evaluated from multiple perspectives, but usually only within the scope of the Village's ambitions and goals itself. Thus, it required the confirmation of the interviewees, that the planning decisions of the HGLV were generally beneficial and constructive.

Potentially, this inability to discover valuations of planning processes among the case study materials pinpoints that the document analysis was ineffective to discover stakeholder interactions and opinions because it focused too strongly on government documents and research reports. Stronger focussing on local press publications, or extending the expert interviews to local community groups or -leaders could have retrieved more individual opinions and judgements more effectively. On the contrary, the extension of the research and interviews would have been beyond the thesis timeframe.

## 5.3 Evaluation of the three Online Expert Interviews

There were three expert interviews conducted, while only one applied to the intended research setting. All in all, the interviews yielded the intended holistic context in both, an inductive and deductive way: validating document findings and concluded themes, and adding diverse and novel insights, especially on interpersonal level.

The main issue for this low number of expert online interviews is that response time and date scheduling took up longer than expected. Moreover, identifying and contacting the appropriate expert was underestimated. One beneficial factor was that upon breaking through to one of the core 'leaders' of the HGLV, recommendations and referrals to other key personalities were offered, but no time was left to conduct the appropriate interviews any more. Hence, a methodic key learning and suggested improvement is to approach key leaders and managers early and specifically ask for referrals.

Regarding the single online interview, which followed intended method, the semi-structured 'miner' approach, emphasizing an open conversation and immediate follow-up, made a big difference to obtain more insights. Without taking time for a thorough immersion in the literature review and the document analysis, the interviewer might not have been able to assume such a knowledgeable understanding of the HGLV reality to actually 'dig out' as much content in the open conversation. Hence, the late point of time where he interviews were conducted might have had a positive contribution, still.

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[55] Most helpful, or rather guiding, are the stories and personal experiences of the interviewees, as these narrations give a glimpse of emotional dynamics in the interactions.

Other interviews were either deliberately asked to be conducted via email, or were only able to be carried out this way due to time constrains. The email conversations were of similar high quality and helped connect the fragments that the document analysis brought up, while adding different perspectives. For instance, the former chair of the HGLV committee was able to actually name the early struggles in ensuring consent and continuity in a detailed manner, which the documents could not yield. The scientific draw-back is that it was asked, in both cases, not to document the email conversation in the appendix.

## 5.4    Conclusion and Contribution of the Case Study

When the case study location was selected, the author did not expect that the HGLV would be a case of foremost only success stories. Hence, HGLV yielded only few oppor-tunities to actually apply the generated interaction-issue-based theory, but was mostly limited to contrasting the themes to the various good-case practice. Nonetheless, the case study was able to confirm the themes. Additionally, the assessment revealed (stakeholder interaction) solutions and planning recommendations, which contribute to areas that the general literature did not cover.

First, WHEELER's and WONG's LCR framework (2013), based on critical success fac-tors of Hume and other cities. It describes the ideal state of LCR preparations, planning, network considerations, and stakeholder types, where buy-in should be fostered. How-ever, as discussed in the literature review, it does not describe how to achieve this buy-in and what methods of involvement to apply. Existing models of community engagement may describe the variety of options, but fail to guide practitioners in how to choose the optimal one. This critical gap in how to facilitate stakeholder interactions is aided by the *Community Engagement Framework and Planning Guide* of HUME CITY COUNCIL ([2012]): It gives simple steps in assessing which degree of engagement is required to align available capacities, involvement methods, and public consent in an optimal way.

If further research was to triangulate and expand this tool with expert and research insights (especially beyond the *community* focus, but also regarding the private sector, or formal education institutions), it might become universally applicable and thus close the literature gap on how to successfully facilitate ECUD planning with a wide range of stakeholders. In combination with the above discussed models and identified themes of ECUD planning and stakeholder engagement, this would yield a holistic end-to-end guid-ance, which can help practitioners prepare for the thesis' central question of *how to ac-complish mutual understanding and an effective communication framework among stakeholders in ECUD (and ILSD).*

# 6    Conclusion

Originally, the fundamental observation and premise that led to this thesis was that the growing movement towards flexible, technology- and learner-centric education architecture and space design seemingly grew beyond its *intuitional* focus towards *transforming entire communities, cities, and regions into education networks*, which aim to further lifelong learning for everyone. It was discovered that this latter idea of '*Learning Cities and Regions*' (LCR) – herein generalized as '*education-centered urban development*' (ECUD) – exists already for decades, without being necessarily based on new, empowering architecture and learning spaces, but simply interconnecting the existing education services and interest groups of the 'local education landscape' (LEL) in dedicated networks and partnerships.

This discovery broadened the discourse, but did not affect the interrelation of 'instructional learning space development' (ILSD) and ECUD, since both aim at impacting the LEL to enhance lifelong-learning for a certain community. From this foundation, the motivation to make a contribution to both, the two scientific discourses and the practical challenges in building optimal learning architecture and networks, led to the focus on mutual issues in stakeholder interactions: The untraditional and experimental nature of ILSD and ECUD gives rise to the problem statement, that the various stakeholder groups[56], who are involved to plan and design each of the two, may lack the experience and the competences of collaborating with each other, thus imposing uncertain planning success. Hence, the thesis asks the research question, *how these stakeholders can accomplish mutual understanding and a more effective communication framework*.

To address this question, a thorough literature review across ILSD and ECUD is conducted to discuss challenges in involving and handling stakeholders in the planning process. As a theoretic guideline, the framework of *networked governance* (NG) is applied, which addresses administrations that collaborate with educational and non-government organizations to provide better services with further reach. The findings are grouped in six themes and then contrasted and tested on the basis of a LCR case study: *Hume Global Learning Village* (HGLV), a suburb to Melbourne, Australia. The case study is build up through a combination of a document analysis of scientific and municipal reports, as well as expert online interviews of key managers and stakeholders of the HGLV planning process.

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[56] 'Stakeholder', in the furthest sense, can mean any group that is affected by a change of the LEL, be it students and youth, active and non-active learners; teachers and other education service providers; planners, consultants or designers; administrators and political decision-makers. Within ECUD, stakeholders can also include the private sector or non-profits, community groups, or simply an adequate representation of the population.

The findings confirmed that ILSD and ECUD both are confronted with the practical issues of ensuring consent and participation of stakeholders before and during the planning, where communication and mutual understanding plays an essential role. Moreover, interaction discrepancies do not just happen among and as a result of *external* participants (such as architects or citizen), but first of all affect those who 'own' the planning process and conduct it: ILSD and ECUD require organizations, administrations, and individuals from areas that have rarely worked with each other before to open up to communicate and collaborate. This was found to be a major challenge.

Furthermore, involving beneficiaries, target groups, key employers, and a representation of the community is in many cases necessary in order to acclaim common consent and input to the services or designs that actually make a difference for regional learning. However, extensive, synergetic, and participative planning requires resources, time, and facilitation capacities to ensure a quality interaction and outcome. Hence, an appropriate degree of stakeholder involvement in terms of *who* to involve and *how* – also matching the local reality and the project's goals – has to be found.

The combination of planning models discussed in the literature suggest a number of alternatives for selection processes, based on an analysis that aligns possible partners and their strengths in the LEL, with the planning demands and goals. However, the literature does not describe how to determine an optimum degree of stakeholder engagement, which aligns with the situational demand and context, while generating more mutual benefits than costs and uncertainty for each party. In fact, *how* to involve stakeholders, *when* and *through what means*, often seems to be taken for granted or is treated like a 'black box'. The consequence for practitioners is that – unless they insource an *external expert* to facilitate the planning – they may assume only a limited set of methods to plan and interact with stakeholders. This could result in a suboptimal stakeholder selection and involvement processes, which invites deficits in stakeholder interaction and planning outcomes. Hence, it might not necessarily and directly be the stakeholders, whose interactions impose an issue to ILSD and ECUD planning, but the *preparation* for the planning and engagement process. Beyond this structural discrepancy, the literature review is summed up in the following six themes: *language and concept*, *leadership*, *learning organizations* (LO), *facilitation*, *sustainable funding*, and *long time periods*.

First, the *concepts* of ILSD and ECUD are highly ambiguous and suffer from a strong variance in definition and clarity, making it difficult to explain and popularize them. The scientific and the practitioner discourse are said to be only loosely connected. Thus, LCRs frequently have issues communicating ECUD, its benefits and implications, and

thus fail achieving buy-in from critical advocates. Moreover, the participating stakeholders enhance the issue by each group's own understanding of learning. Here, it is suggested to facilitate a learning-theory-building and define a common vocabulary. HGLV ensured comprehensibility through high-profile and celebrity advocates as multipliers, physical learning space as a symbolic beacon, a broad vision, based on *local issues* that everyone could relate to, but contrarily also *positive* language, stressing *opportunity* instead of deficits.

Second, *leadership* is crucial, because there is a strong dependency on individuals to initiate ILSD and ECUD. It is individuals who bring up the concept and unite other critical stakeholders to further development and common acceptance of the idea, before, during, and beyond planning. The presence of leadership can ensure a better foundation for vision-based consent, collaboration, and commitment. Leadership is required on the organizational level that administers the planning, as well as at the bottom end, for instance in the form of community leaders, to ensure representation and advocacy. In the process of stakeholder analysis, leaders should be identified, engaged and empowered first, so that they can act as multipliers. An excess in leadership capacity was possibly the most critical success factor for HGLV: Initiated by charismatic, locally minded, and resourceful individuals, a broad range of high-profile advocates could be attained across local sectors and political hierarchies. As a result, the leadership capacities aided the success of all other identified themes and thus secured enthusiasm, buy-in, participation and sustainability of the network.

Third, education organizations of any degree of formality face internal barriers in attitude and capacities to engage in collaboration. In becoming a '*learning organization*' (LO), restrictive structures are erased to further staff empowerment, which leads to a more innovative and entrepreneurial mindset and thus allows for networked thinking. The characteristics of a LO are so similar to those of an LCR that it becomes feasible to state, first, that ECUD networks are LOs, and second, that that each partner in such a network has to integrate their values and visions, and eventually empower lifelong-learning among their staff through a change of internal culture. Just as leadership for individual levels, LOs are *organizational* prime-movers of ECUD: one organization role-modelling learning culture can result in a top-down 'ripple effect', which engages and empowers others. Organizational or cultural changes were least noted in the planning of HGLV, supposedly because the high degree of leadership ensured an appropriate momentum of participation, will, commitment, and capacity. Still, the development of a sharing and learning culture can be noted.

Fourth, ECUD and ILSD demands a thorough degree of *facilitation* capacities. Project owners' capacities are more challenged the more stakeholders they include. Ensuring quality coordination and communication is necessary to foster trust and progress. Especially leaders require solid and authentic skills in networking and problem-solving. Contracting-out is a viable solution, be it for advisory, actual process facilitation, or capacity building. HGLV has a community-driven membership committee, funded by city council. While the committee had to learn collaboration step by step, the network was built up by a diversely skilled team of networkers who facilitated important stages to begin with. Besides, external consultants were insourced for strategy and evaluation planning, and renowned researchers on ECUD provided invaluable advisory.

Fifth, the relevance of adequate *funding* appears abstract, but turns out as crucial, since hardly anyone would join a network that has no resources to operate. Funding is conventionally restricted to short-term and one-time support, which does not meet the requirements of long planning processes and networks that are founded for continuity. Limited or unbeneficially distributed resources can cause non-consent and -commitment in planning. Networks may solve capital shortages by aggregating their common resources and merge service- and spatial infrastructure, but ultimately have to structure their proposals and programs in an already sustainable form. The role of leadership in lobbying and fundraising is important. In Hume, again, early leadership and networking ensured a lot of advocacy, and hence access to funding and support. Moreover, private-sector partnerships provided access to much more resources than just financial capital. Consequently, quality network and succession management are vital to ensure ongoing support.

Sixth, in general, collaborative processes and community engagement simply require more *time* to be planned, initiated, and carried out. On top, developing the LEL may take longer periods until the intended effects can be measured. Outsiders usually expect quicker results, which may lead to disappointments or reluctance of buy-in, especially in political support. Hence, long-term planning is crucial, just as much as the appropriate communication and expectation setting. HGLV is similarly subject to long durations, be it planning, partnership maturity, or positive effects in learning among citizen. However, it seems that this expectation was set up-front, so that network members did not expect swift results, including even the government, which was a vital foundation for sustainability and continued participation.

The implications of these findings demonstrate that by ensuing the above six themes, ECUD and ILSD practitioners may be better equipped to engage stakeholders in planning processes while enabling open-mindedness and mutual understanding, consent,

and the will to participate and commit. The case study validates that the six themes – especially leadership –, and demonstrates that they can be vital tools to avoid stakeholder interaction shortcomings already *before* a network or planning process has been initiated. Another validation comes from the global research initiatives and networks around ECUD, which similarly mention the themes as critical success factors (WHEELER, WONG 2013; LONGWORTH [2014a], [2014b], n.d., 2012). Consequentially, this redundancy means that the thesis' theory building has not yielded discretely unique or novel findings.

A definite further research suggestion is based on the abovementioned gap in the literature: The lacking discussion of an appropriate degree and method of stakeholder involvement, given specific local goals, and capacities. The literature review illustrates that combining models of planning processes and community engagement only builds a large spectrum of stakeholder involvement options, but not a consistent guideline to determine an optimum for a complex scenario in reality. Interestingly, however, the document analysis retrieved records, which would help other practitioners overcome exactly this issue, and which would fill the gap in the literature if tested and validated. If this gap was addressed in such a way, and if the discussed planning process models were to be combined with other interdisciplinary foci, practitioners would obtain tools, which were more agile and universal to help design planning processes that allow for the full spectrum of stakeholder involvement degrees to be applied.

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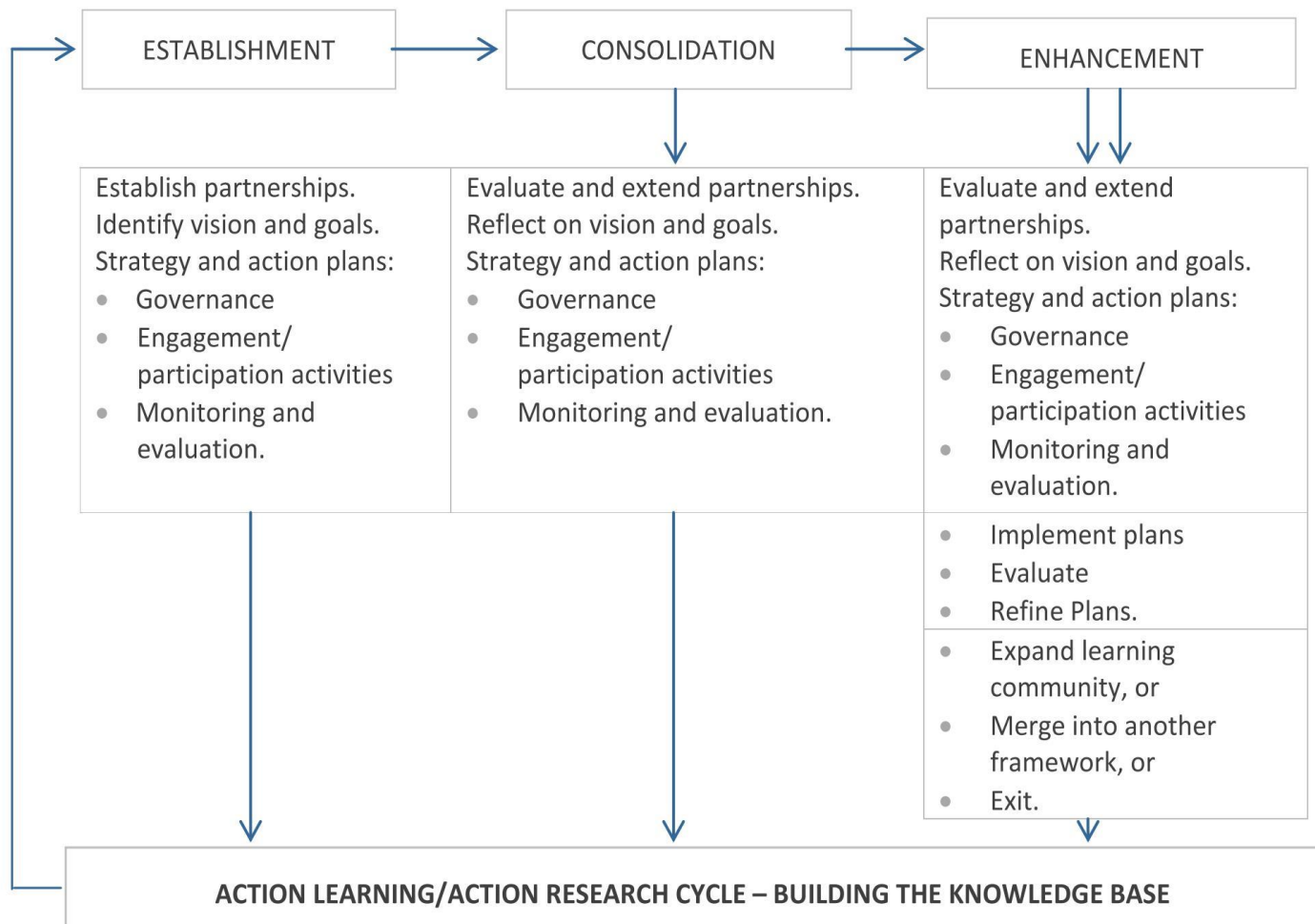
# 8    Appendix

## Figure 7: The KnowCis Methodology



**Source:** adapted from Ergazakis *et al.* (2006b)
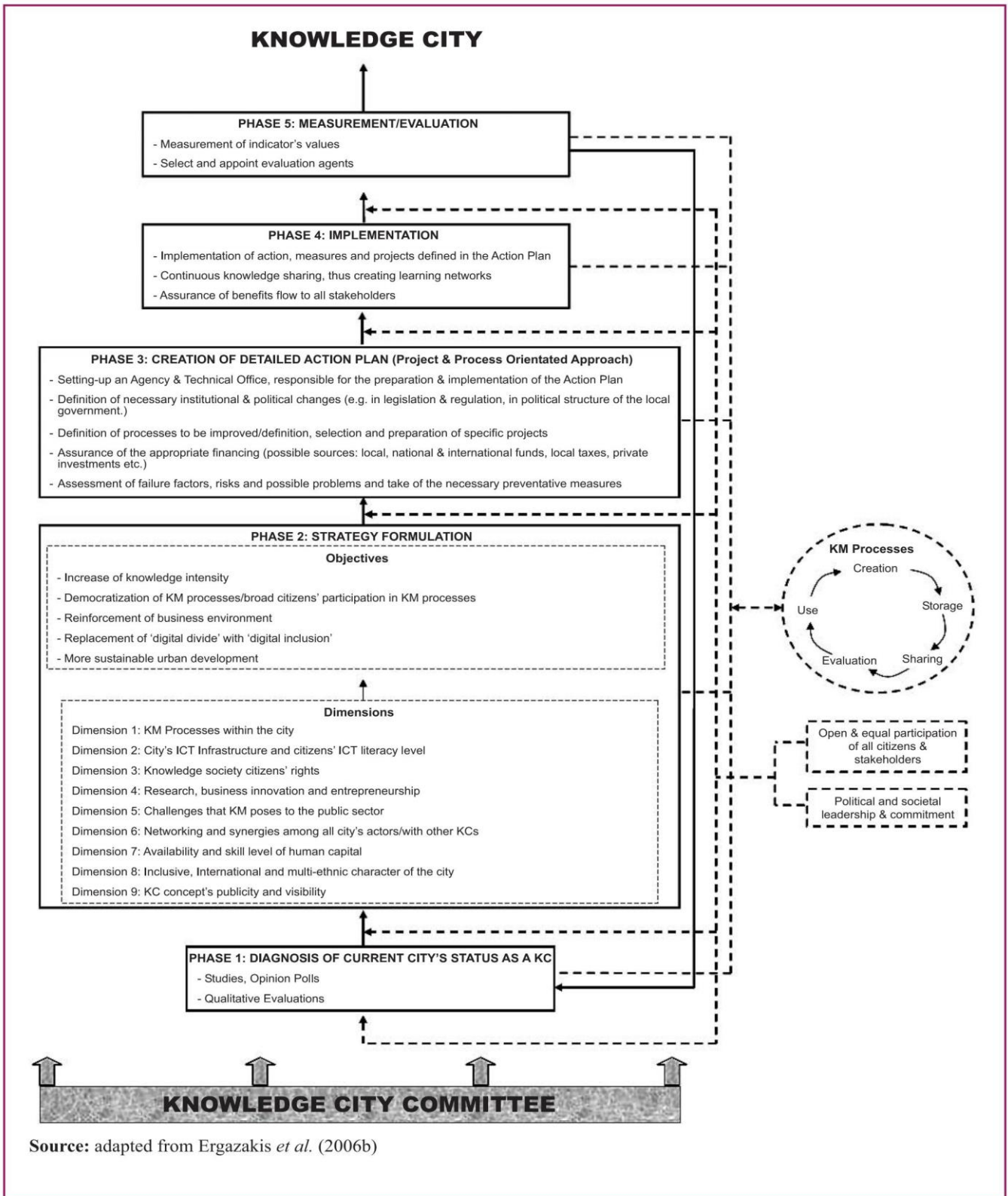
(Metaxiotis, Ergazakis 2008, p. 142)

## Figure 8: Life Cycle of an operational Framework for a Learning Community

| ESTABLISHMENT | CONSOLIDATION | ENHANCEMENT |
|---|---|---|
| Establish partnerships. Identify vision and goals. Strategy and action plans:<br>• Governance<br>• Engagement/ participation activities<br>• Monitoring and evaluation. | Evaluate and extend partnerships. Reflect on vision and goals. Strategy and action plans:<br>• Governance<br>• Engagement/ participation activities<br>• Monitoring and evaluation. | Evaluate and extend partnerships. Reflect on vision and goals. Strategy and action plans:<br>• Governance<br>• Engagement/ participation activities<br>• Monitoring and evaluation. |
| | | • Implement plans<br>• Evaluate<br>• Refine Plans. |
| | | • Expand learning community, or<br>• Merge into another framework, or<br>• Exit. |

**ACTION LEARNING/ACTION RESEARCH CYCLE – BUILDING THE KNOWLEDGE BASE**
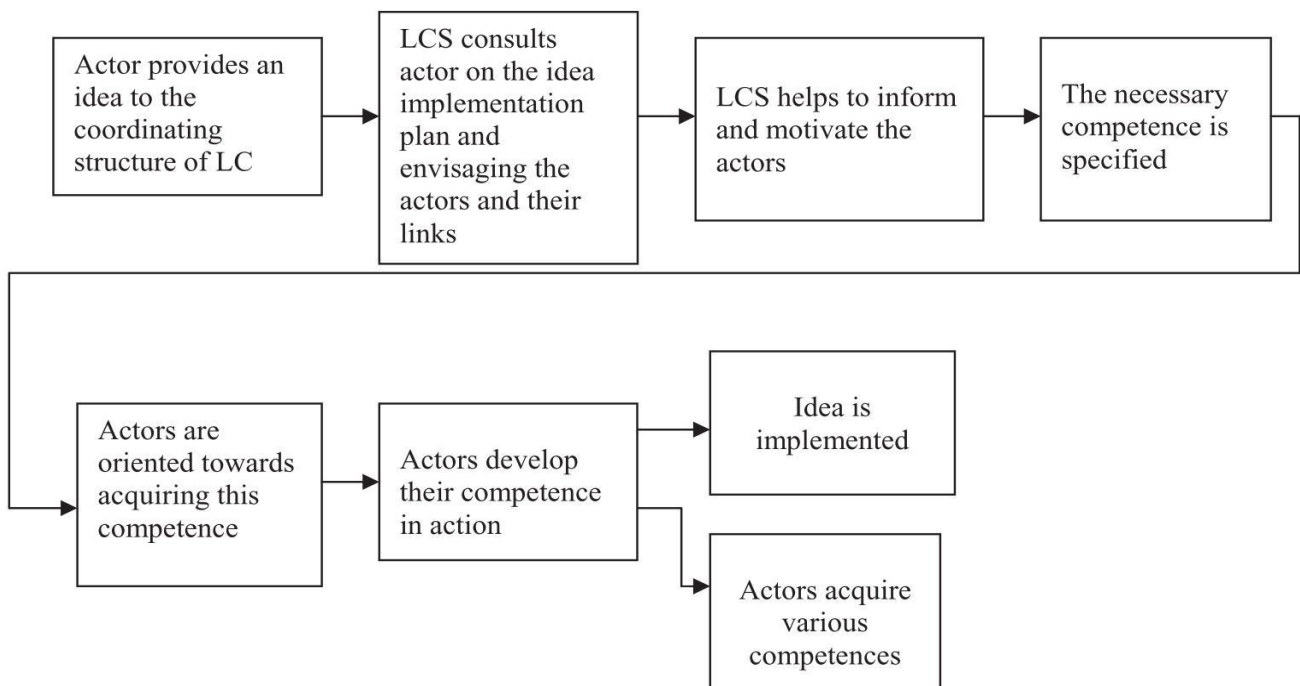
*Adapted from Wheeler 2004*

(WHEELER, WONG 2013, p. 4)

## Figure 9: The updated KnowCis Framework – Dimensions of Knowledge Cities
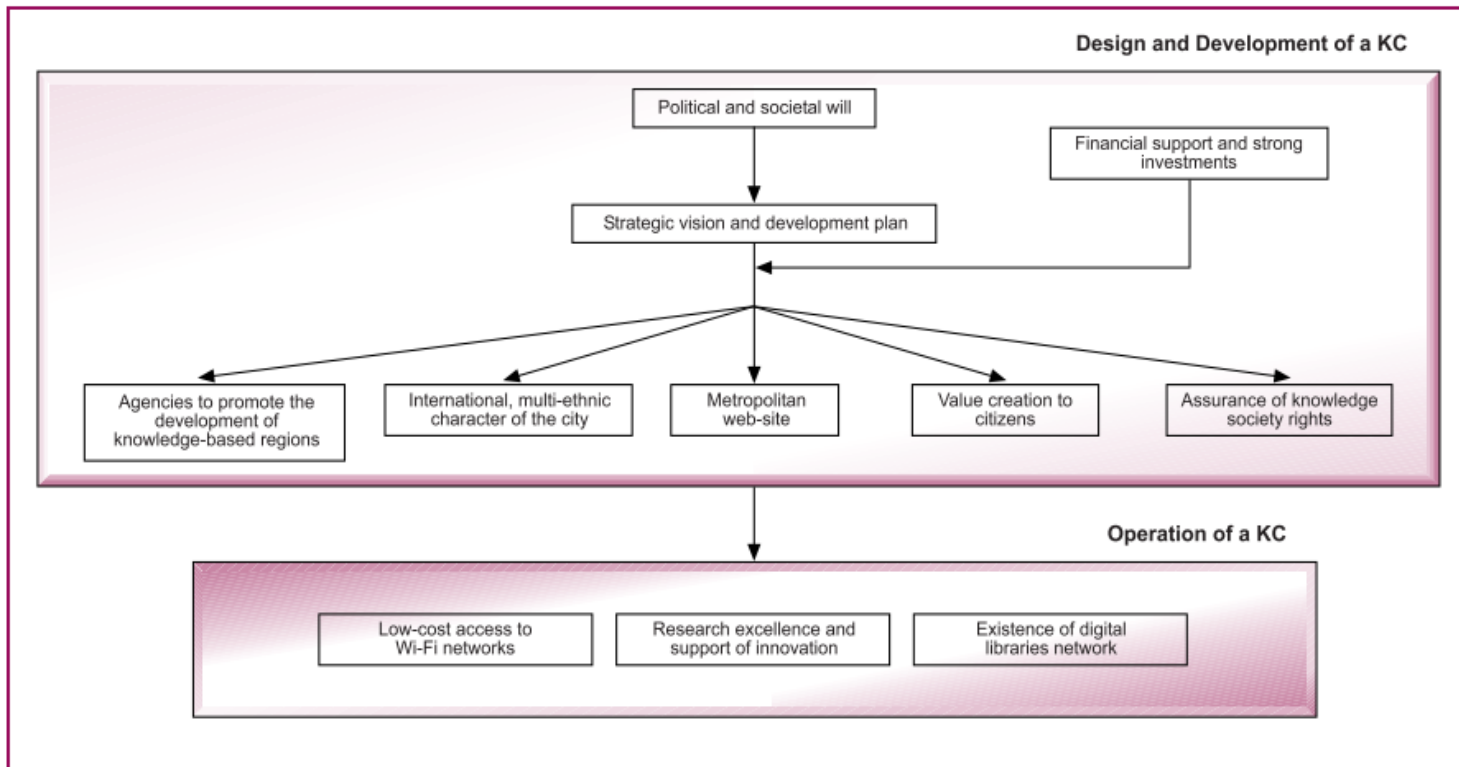


(ERGAZAKIS et al. 2009, p. 226)

## Figure 10: Kaunas Citizen Initiative



(JUCEVICIENE 2010, p. 427)