

**TOWARD TRANSFORMATIONAL LEADERSHIP DEVELOPMENT
IN THE LOCAL CHURCH:**

**A SYNTHESIS OF INSIGHTS FROM INSTRUCTIONAL DESIGN,
ADULT LEARNING THEORY, THE NEW TESTAMENT,
AND ORGANIZATIONAL RESEARCH**

by

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The opinions expressed in this dissertation do not necessarily reflect the views of the South African Theological Seminary.

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DECLARATION

I hereby acknowledge that the work contained in this dissertation is my own original work and has not previously in its entirety or in part been submitted to any academic institution for degree purposes.

A handwritten signature in cursive script, reading "Elbert E. Watson". The signature is written in dark ink and is positioned above a horizontal line.

Elbert Elliott Watson

1 December 2012

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A project of this magnitude is no easy undertaking. When I started this dissertation in 2008, I had no idea it would take four years to complete! Though the journey has been arduous on occasion and plagued by unwelcome distractions, the learning experience has been simply marvelous. By God's grace, I am now much better equipped for the strategically significant ministry ventures which lie ahead.

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SUMMARY

In recent years, the concept of church-based leadership training has gained momentum in various parts of the world, including South Africa. The emergence of new leader-intensive ministry models such as the cell church, along with the costs, complexities, and contextual issues associated with theological studies at an established tertiary institution, has motivated many churches to explore alternatives to traditional leadership training methods. Among these is church-based leadership training. Though the local church would seem to be an ideal environment for the development of leaders, many church-based training efforts rely primarily upon traditional 'schooling' approaches to develop leaders, with less than transformational results.

In an effort to assist South African churches to create their own transformational approaches to leadership development, this project researched theoretical perspectives and practices in instructional design and adult learning, leadership development in the New Testament, and contemporary models and 'best practices' in both church-based and organizational leader development, all with a view toward the identification of elements fundamental to the design of transformational church-based leadership development strategies and the creation of a set of 'recommended practices' to guide church leaders in the design process.

Findings from the various areas of research yielded surprisingly consistent results, giving credence to the leadership development approaches utilized by the Lord Jesus and the apostle Paul. A synthesis of the research identified at least seven elements that contribute significantly toward the transformational development of ministry leaders in the local church. This, combined with specific insights gleaned from the various fields, engendered the formulation of a set of recommended practices, supplemented by a systematic design guide, providing local churches with a research-backed approach to the design of their own transformational processes of leadership development.

TABLE OF CONTENTS

ACKNOWLEDGEMENTS	5
SUMMARY	7
TABLE OF CONTENTS	9
LIST OF FIGURES	15
LIST OF TABLES	17
Chapter One: Introduction	19
1.1 Background	19
1.2 Research Problem	25
1.3 Objectives	25
1.4 Research Design and Methodology	26
1.3 Delimitations	30
1.5 Definitions and Concepts	31
1.6 Overview	33
1.7 Conclusion	34
Chapter Two: An Overview of Instructional Design	35
2.1 Introduction	35
2.1.1 An Overview of This Chapter	38
2.1.2 Definitions and Purposes of Instructional Design	38
2.1.3 Characteristics of Instructional Design	42
2.1.4 Major Assumptions Underlying Instructional Design	44
2.1.5 Core Questions in the Instructional Design Process	45

2.2 Influences on the Development of Instructional Design	47
2.2.1 Foundations of Instructional Design	47
2.2.2 Historical and Theoretical Influences on the Development of Instructional Design	56
2.3 Overview of Major Theories and Models	66
2.3.1 Gagné’s Conditions of Learning and Nine Events of Instruction	67
2.3.2 The Dick and Carey Systems Approach Model	73
2.3.3 The Smith and Ragan Model of Instructional Design	78
2.3.4 The Morrison, Ross, and Kemp Model	86
2.3.5 ADDIE (Instructional Systems Design)	88
2.3.6 Backward Design	93
2.3.7 Constructivism and Instructional Design	98
2.3.8 The R2D2 Model of Jerry Willis	101
2.3.9 Jane Vella’s Design Steps for Dialogue Education	106
2.4 Conclusion: Instructional Design and Church-based Training	118
2.4.1 The Value of Instructional Design	118
2.4.2 Implications for Leadership Development in the Local Church	120
Chapter Three: A Review of Scholarly Literature on Adult Learning	123
3.1 Introduction to Adult Learning Theory	123
3.1.1 Purpose and Structure of This Chapter	124
3.1.2 Defining Adult Learning — No Simple Task	124
3.2 The Adult Learner	127
3.3 Key Learning Theories	130
3.3.1 Behaviorism	132
3.3.2 Cognitivism	142
3.3.3 Social Cognitive Theory/Social Learning Theory	158
3.3.4 Andragogy	162
3.3.5 Experiential Learning	173
3.3.6 Constructivism	184
3.3.7 Multiple Intelligences	199
3.3.8 Transformative Learning	205
3.3.9 Holistic Theory of Knowledge and Adult Learning	214

3.4 Conclusion — Best Practices in Adult Learning	224
3.4.1 Evidence-based Educational Practice	224
3.4.2 Suggested Best Practices in Adult Learning	226
3.4.3 Gleaning from the Various Theories	228
Chapter Four: Leadership Development in the New Testament	231
4.1 Introduction	231
4.2 The Biblical Mandates	232
4.3 The Developmental Methodologies of Jesus and Paul	239
4.3.1 Jesus — Model Teacher and Trainer	239
4.3.2 An Overview of the Developmental Strategy of Jesus	240
4.3.3 The Learning Environment of the Disciples	244
4.3.4 The Practice of ‘With-ness’	245
4.3.5 Modeling	247
4.3.6 Discipleship, Apprenticeship, and Mentoring as Platforms for Leadership Development	250
4.3.7 The Developmental Goal of Paul	262
4.3.8 The Example of Paul and Timothy	263
4.3.9 The Teaching Ministry of Jesus	266
4.3.10 The Teaching Ministry of Paul	274
4.3.11 The Importance of Teaching	278
4.3.12 Skills Development	278
4.4 Three Important ‘Leadership’ Metaphors	279
4.4.1 The Leader as a Servant	280
4.4.2 The Leader as a Steward	283
4.4.3 The Leader as a Shepherd	286
4.5 The Holy Spirit and Leadership Development	289
4.5.1 The Holy Spirit in the Life of Jesus	290
4.5.2 Jesus’ Teaching on the Holy Spirit	291
4.5.3 The Holy Spirit and Leadership in the Early Church	292
4.5.4 The Spirit’s Role in the Selection and Appointment of Leaders	294
4.5.5 The Holy Spirit in the Writings of Paul	294
4.5.6 The Holy Spirit in Teaching and Learning	296

4.5.7 The Development of Giftedness	297
4.5.8 Spiritual Gifts	299
4.6 Toward Biblical Transformation	302
4.6.1 The Call to Transformation	303
4.6.2 Factors that Contribute to Transformation	304
4.6.3 Willard's Perspective on Transformation	306
4.6.4 Implications for Church-based Training and Development	308
4.7 Selection	309
4.7.1 The Selection of the Twelve	310
4.7.2 Qualifications for Church Leadership	314
4.8 Considerations for Church-based Training	318
4.8.1 Four Types of Training	319
4.8.2 Perspectives from Christian Education	320
4.8.3 A Final Overview of Jesus' Strategy	322
4.9 Conclusion	323
Chapter Five: Models, Strategies, and Insights	325
5.1 Overview	325
5.2 Perspectives on the Formation of Church Leaders	326
5.2.1 The Scholastic Model	326
5.2.2 Clinton's Developmental Approach	329
5.2.3 The Be-Know-Do Model	332
5.2.4 Reed's Perspectives on Ministry Formation	334
5.3 International Models of Church-based Leadership Development	335
5.3.1 BILD International/Antioch School	335
5.3.2. Centers of Church-based Training (CCBT)	346
5.3.3 LeaderSource SGA	357
5.4 Local Church Models of Leadership Development	372
5.4.1 Maranatha Community Church	373
5.4.2 Little Falls Christian Centre	380
5.5 Selected Insights from Organizational Research	387

5.5.1 The 70-20-10 Guideline	388
5.5.2 Experiences that Contribute to Leader Development	390
5.5.3 Leadership Development Pathologies in Organizations	393
5.5.4 The Primary Roles of Leadership Development in Organizations	394
5.5.5 Guiding Principles for Leadership Development in Organizations	399
5.6 Conclusion	402
Chapter Six: Recommended Design Practices in Church-based Leadership Development	407
Introduction 6.1	407
6.1.1 Review of Objectives	409
6.1.2 Overview of the Chapter	409
6.2 Terminology: Is 'Best Practice' the Best Term?	410
6.3 Foundational Perspectives	411
6.3.1 A Stronger Emphasis on Church-based Leadership Development	411
6.3.2 Perspectives on Christian Leader Development	412
6.4 Building a Framework	414
6.4.1 Strong Support from Senior Leaders	415
6.4.2 A Focus on Selecting and Developing Emerging Leaders with High Potential	416
6.4.3 The Right Leadership Development 'Done Right'	417
6.5 Perspectives on Design: Asking the Right Questions	419
6.6 Recommended Design Practices for Church-based Leadership Development	425
6.6.1 Approach Design with a Biblical Perspective	425
6.6.2 Create Alignment	427
6.6.3 Create a Developmental Pathway	429
6.6.4 Define the Developmental Goal(s)	430
6.6.5 Conduct a Needs Analysis	431
6.6.6 Adopt a Holistic, Transformational Approach	433
6.6.7 Identify, Utilize, and Link Effective Developmental Processes	435
6.6.8 Incorporate Serious Ordered Learning	450

6.6.9 Conduct Meaningful Evaluation	452
6.6.10 Practice Wise Selection	453
6.7 Critical Success Factors	454
6.8 Cultural Considerations	456
6.9 A Suggested Design Template	459
6.9.1 An Overview of the Process	460
6.9.2 Create Alignment	461
6.9.3 Define the Developmental Goal(s)	463
6.9.4 Determine the Selection Criteria and Process	465
6.9.5 Conduct a Threefold Analysis	467
6.9.6 Create a Supportive Framework	469
6.9.7 Determine the Most Appropriate Developmental Processes	469
6.9.8 Create an Integrated Design	483
6.9.9 Template Flow Chart	484
6.10 Conclusion	487
Chapter Seven: Toward Transformational Leadership Development in the Local South African Church	489
7.1 Review of the Research Problem and Objectives	489
7.2 A Review of the Research Process and Findings	491
7.2.1 Insights from Instructional Design Theory	491
7.2.2 Gleaning from Theories of Adult Learning	494
7.2.3 Leadership Development in the New Testament	498
7.2.4 Gleaning from Existing Models	501
7.2.5 Research on Leadership Development Practices	504
7.3 A Theory of Action (Recommended Practices)	505
7.5 Suggestions for Further Research	507
7.6 Final Challenge	508
WORKS CITED	511

LIST OF FIGURES

Figure 2.1: Relationship Among Theories	42
Figure 2.2: Theoretical Bases of Instructional Design	47
Figure 2.3: Adapted Version of Schramm's 1956 Model of Communication	50
Figure 2.4: Understanding Cognitive Load	65
Figure 2.5: The Dick, Carey, and Carey Model for Designing Instruction	75
Figure 2.6: The Smith and Ragan Model	80
Figure 2.7: The Smith and Ragan COGGS Model	85
Figure 2.8: The MRK Model	87
Figure 2.9: The ADDIE Instructional Design Model	89
Figure 2.10: The R2 D2 Model	102
Figure 3.1: Ausubel's Process for Meaningful Learning	147
Figure 3.2: The Stage Model	151
Figure 3.3: Baddeley's Model of Memory	152
Figure 3.4: Squire's Taxonomy of Long-term Memory	155
Figure 3.5: The Triadic Reciprocity of Social Cognitive Theory	160
Figure 3.6: Reischmann's Structural Scheme of Adult Learning	164
Figure 3.7: Andragogy in Practice	170
Figure 3.8: Experiential Learning Cycle and Learning Styles	175
Figure 3.9: Honey and Mumford Experiential Learning Cycle	176
Figure 3.10: Jarvis' Learning Model	177
Figure 3.11: Combined Learning Styles of Kolb and Honey and Mumford	182
Figure 3.12: The Zone of Proximal Development	191
Figure 3.13: Gardner's Theory of Multiple Intelligences	202
Figure 3.14: Holistic Theory of Knowledge and Learning: Dynamic Relationships of the Three Knowledge Facets and Implied Modes of Learning	219
Figure 3.15: Dynamic Interactions Among the Knowledge Facets at Individual and Social Levels	220
Figure 3.16: Developing an Evidence-based Adult Education System	225
Figure 4.1: Giftedness Development Pattern	299

Figure 4.2: The Danger of Isolated Beliefs	320
Figure 5.1: The Traditional Scholastic Model	329
Figure 5.2: Clinton's Adapted Version of Holland's Two Track Analogy	331
Figure 5.3: The CCBT Head, Heart, Hands Model	333
Figure 5.4: Flow Chart of the W.I.S.D.O.M. Learning Process	351
Figure 5.5: The Traditional Approach to Training Church Leaders	358
Figure 5.6: The Local Factory in the Local Church	360
Figure 5.7: The Local Church Learning Community	361
Figure 5.8: The '5C' Model of a Healthy Leader	362
Figure 5.9: Elements of a Transformational Context	364
Figure 5.10: Components of the ConneXions Model	367
Figure 5.11: The LeaderSource SGA Model for Process Design	367
Figure 5.12: Maranatha's Leader Development Flowchart	377
Figure 5.13: Little Falls <i>Leadership Development Course</i> Flowchart	385
Figure 5.14: The 70-20-10 Rule for Effective Leadership Development	389
Figure 6.1: Components of Leader Development	421
Figure 6.2: The Leadership Development Journey	424
Figure 6.3: The Development Process	437
Figure 6.4: Factors That Make Experiences Developmental	438
Figure 6.5: Creating Alignment	461
Figure 6.6: The Role of Developmental Processes	470
Figure 6.7: Elements of Effective Course Design	474
Figure 6.8: Design Template Flow Chart	485

LIST OF TABLES

Table 2.1: Bloom's Taxonomy	60
Table 2.2: Bloom's Original and Revised Taxonomy of the Cognitive Domain	61
Table 2.3: Bloom's Taxonomy: Affective Domain	62
Table 2.4: Gagné's Events of Instruction	70
Table 2.5: Backward Design Template	97
Table 2.6: A Comparison of Objective-Rational and Constructivist Instructional Design Models	100
Table 2.7: How Dialogue Education Differs From Traditional Training	113
Table 2.8: Comparison of Reviewed Instructional Design Models	119
Table 3.1: Six Orientations to Learning	131
Table 3.2: Five Ways of Learning Declarative Knowledge	157
Table 3.3: Andragogy: Assumptions and Design Implications	170
Table 3.4: Jarvis' Typology of Experiential Learning	178
Table 3.5: Matrix View of Kolb's Learning Styles	180
Table 3.6: Individual and Social Perspectives in Constructivism	197
Table 3.7: Holistic Theory of Knowledge and Learning: Comparison of Three Knowledge Facets	216
Table 3.8: Three Knowledge Facets and Three Knowledge Layers	218
Table 3.9 The Holistic Theory of Organizational Knowledge	223
Table 4.1: Jesus' Preparatory Empowerment Process	242
Table 4.2: Mentoring Types	261
Table 4.3: Servant Leadership in Matthew 20:25-28 and John 13:3-17	282
Table 4.4: Qualifications for Overseers	316
Table 5.1: Contrast in Traditional and LeaderSource SGA Approaches	371
Table 5.2: Maranatha Training Courses	379
Table 5.3: 2012 Curriculum of the LFCC Discipleship Training Centre	386
Table 6.1: Holistic Development Goals	465

Chapter One

Introduction

1.1 Background

In recent years, the concept of church-based leadership training has gained momentum in various parts of the world. The emergence of new leader-intensive ministry models, along with the costs, complexities, and contextual issues associated with theological studies at an established tertiary institution, have motivated many churches to explore alternatives to traditional leadership training methods. Organizations such as BILD International, the Centers of Church-Based Training (CCBT), and LeaderSource Strategic Global Alliance (SGA) have served as advocates of church-based training, challenging accepted norms, contributing to scholarship, developing models and materials, and conducting seminars in nations all over the world to assist local churches to develop their own leadership training initiatives. In particular, Jeff Reed's *Paradigm Papers*¹ have challenged much current thinking about the most effective methods for training church leaders. In a monumental address to delegates at the 30th annual ACCESS Conference in 2001, Reed (2001:2-3) stated,

The problem is not that formal education structures exist but that they drive the leadership development enterprise of the church today. Formal theological education today is a meso paradigm. It is

¹ Released between 1992 and 1997, the *Paradigm Papers* address issues concerning how the church prepares itself for ministry and mission in today's world.

a constellation of beliefs filled with rules about professors, students, courses, classrooms, testing, degrees, and the very powerful accrediting associations. The core biblical values — faithfulness in service, entrusting in ministry contexts, discipleship, spiritual disciplines, and character development — are marginalized when taken out of their natural context of ministry and community life and institutionalized. The key issue is not the existence of formal theological education but is its power and its all pervasiveness in driving the entire upper level leadership development enterprise for the church today or, for that matter, all serious ministry preparation. Today's enterprise is institutionally driven, not ecclesiologically driven.... The leadership charges in the New Testament letters to the churches demand that the needs of the churches drive the churches' leadership development enterprise, not the Western formal schooling paradigm.

Though the influence of organizations such as BILD, CCBT, and LeaderSource SGA has been minimal in South Africa, the rapid emergence of the cell church movement has given great impetus to church-based initiatives focused on the development of ministry leaders. Since small group ministry models are heavily dependent upon available and effective leadership at multiple levels, many churches are investing significant time, effort, and resources training their own leaders. Some design their own proprietary processes of leadership development. Others make use of existing courses and/or curricula provided by tertiary institutions, large cell churches, online organizations, and church-based training organizations like those mentioned above.

Reflecting the influence of modern educational paradigms, many church-based training programs utilize learning methods that are primarily cognitive in nature, emphasizing the *what* while giving little consideration to the *how*. Church leaders are beginning to realize that it is not enough to put potential leaders through a series of courses and expect them to emerge as mature and effective leaders.

In his manual on leadership training models, J. Robert Clinton² (1984, 2006) acknowledged that, for the purposes of spiritual and ministry formation, educational approaches based on the information-driven ‘traditional schooling model’ (Clinton 2006:5) are not as advantageous as developmental approaches that engage all three learning domains — cognitive, affective, and experiential. Balanced development — knowing, doing, and being — is encouraged by intentional multi-domain learning (Holland 1978:98). In an article critically examining various approaches to the development of spiritual leaders, Harkness (2001:142) associated the three major dimensions of knowing, doing, and being with “the cognitive acquisition of appropriate knowledge, competence in required ministerial skills, and personal character development”, the traditional goals of ministerial formation.

Stressing the need for holistic leadership development processes, Gibbs (2005:201, 211) stated,

Training needs to be designed according to the individual's learning style, personal gifting, and calling. It must maintain the interrelationship between theory, practice, reflection, and assessment. Outcomes have to be measured in terms of personal formation, not simply on the amount of information assimilated.... Our thinking concerning education and training for church leadership needs to move from mechanistic models to organic ones.

Malcolm Webber (2008b), founder of LeaderSource SGA commented,

True leader development is not merely a class lecture or a small group session that is sponsored by the church and that occurs in a room in the church building (and is thus “church-based”).... Leader development needs to be integrated into the life of the church — truly owned by the church, occurring across the life of the church, all week long.

² J. Robert Clinton is the senior professor of leadership with the School of Intercultural Studies at Fuller Theological Seminary. He has devoted his life to the research of Christian leadership and leadership emergence.

Highlighting the importance of the training paradigm, Webber (2008b) noted that if the purpose of 'training' is merely to fill the heads of emerging leaders with information, then a predominantly academic approach suffices. However, if the objective is to develop healthy spiritual leaders, then a 'holistic' process is required. Developing spiritually healthy leaders necessitates a "transformational collage of spiritual, relational, and experiential as well as instructional dynamics" (Webber 2008b).

In spite of this, the 'traditional schooling model', in which the transmission of information is prioritized, remains the predominant approach to theological training in many African churches and denominations (Mwangi and de Klerk 2011:2-3). Though 'content' (the *what*) is certainly critical, effective leadership development also requires process (the *how*). In *Transforming Discipleship*, Ogden (2003:154) highlighted three environmental elements that promote transformation. Only one is cognitive!

As Harkness (2001:142) noted, most theological training institutions see their purpose as "the effective equipping of men and women for appropriate leadership and ministry within churches and associated organizations and institutions". Often labeled "ministerial formation", this process seeks to provide "what is needed to form those being educated into people with the appropriate blend of qualities which will enable them to minister effectively" (Harkness 2001:142).

This project is not a polemic against formal theological education.³ Nonetheless, it is important to acknowledge the ongoing debate concerning the place and value of institutional theological studies in the development of ministry leaders. Since the second half of the twentieth century, the efficacy of tertiary theological institutions as facilitators of ministerial formation has engendered serious

³ Having pursued theological studies at both undergraduate and postgraduate levels in four institutions, this researcher has experienced both the 'good' and the 'bad' in tertiary level theological studies. In spite of the shortcomings, I have benefitted greatly from my academic studies and in no way want to denigrate theological institutions or to belittle the importance and value of academic research and learning. However, academic studies alone are not enough to develop spiritually mature, well-equipped leaders for the local church.

discussion. Theological learning institutions have faced a constant “barrage of questions and concerns from both those within the institution and the stakeholders” such as churches and ministry organizations (Harkness 2001:143). As Harkness (2001:143-144) noted, a certain amount of discontent emerged from students, churches and organizations, and lay people alike over this period. While generally satisfied with their tertiary theological learning experience, students who entered ministry often discovered that they lacked even the basic equipping needed for effective ministry. As recipient organizations, churches expressed dissatisfaction at receiving young ministry candidates who, in effect, needed to be ‘retooled’ to be of practical value to the church. Lay people, while respecting the status theological training gives to newly appointed ministers, voiced frustration at the apparent ‘disconnect’ between the training young ministers received and the realities of everyday life.

South African theological institutions are not exempt from inadequacies in their developmental approaches. Naidoo (2005:147) discovered that only one of the five theological institutions she researched in KwaZulu-Natal had an intentional process of spiritual formation. She also observed that the institutions she studied were overly preoccupied with academic achievement at the expense of pastoral equipping (Naidoo 2005:149). In addition, three of the institutions had weak nurturing communities; and all had inadequate in-service learning programs (Naidoo 2005:128-133).

Two other major challenges hinder tertiary theological education and training institutions — relatively high costs and limitations in capacity. In the South African context, both of these undoubtedly contribute to the increasing interest in church-based leadership development.

While seminary and Bible college ministry training programs certainly face challenges, church-based solutions to the training and development of ministry leaders are no panacea. Seminaries and Bible colleges exist because churches past and present have generally proven themselves unequal to the task of developing leaders who might be considered ‘theologically competent’.

Commendably, many theological institutions are aware of the challenges and are continually evaluating and enhancing their programs in an effort to address these concerns. This has resulted in improvements in instructional design, broader access (especially through distance learning), closer working relationships with churches, greater attention to context, the development of intern and mentoring programs, and an increasing focus on balanced formation.

Nonetheless, for whatever reason, many churches are opting to develop their own leaders; and assisting such churches is the specific focus of this project. Church-based training advocates Forman, Jones, and Miller (2004:25) asserted,

The church has a God-given capacity to engage in whole-life leadership development. It can develop godly character in its leaders, help them forge a strong theological worldview, and build strong relational and leadership skills. The local church is by design the most effective incubator of spiritual leaders on the planet. The answer to the shortage of church leaders around the world has been there since Pentecost. The answer is this: restoring the church to the center of leadership training — which has been God's strategy all along.

Authentic Christian leaders, holistically developed within community, transformed through God's word and the work of the Spirit, not only impact the church, they change their world. As Kretzschmar (2002:46) wrote,

Africa needs leaders of integrity and competence rather than leaders who are immoral and who misuse or abuse power. Empowered, properly trained and conscientious Christian leadership (both clerical and lay) can make an enormous difference in addressing the wide range of personal, family, and social needs in Africa.

According to Clinton (1989:97), the goal of Christian leadership development is leaders who are "mature in leadership character, leadership skills, and leadership values" and are committed to the accomplishment of God's purposes. For church-based leadership development strategies to be transformational in the biblical sense, serious attention must be given to the *how* of leadership development. How can local churches facilitate the emergence of leaders who

are spiritually mature, biblically wise, and skilled in ministry? One answer lies in effective design.

1.2 Research Problem

In line with worldwide trends, church-based leadership training is gaining momentum as a grass roots movement among South African churches committed to raising up their own ministry leaders. Habituated to a Western academic concept of learning, many of these churches have adopted a traditional schooling approach to leader development. Some simply string together a few non-formal courses and hope for the best. Others have no intentional or formalized process of any kind. None of these approaches produce satisfactory results. What many of these churches seem to lack is a comprehensive understanding of how to design processes that build effective ministry leaders.

This problem evokes the following questions.

- (1) What elements are fundamental to the design of transformational church-based leadership development strategies?
- (2) What practices should guide the design and implementation of leadership development strategies in the local South Africa church?

Identifying elements critical to the design of effective leadership development processes would do much to address this problem. In addition, the formulation of a set of research-backed recommended practices would provide helpful guidance to churches seeking to develop or improve their own leadership training programs.

1.3 Objectives

The purpose of this project is to identify factors that facilitate the development of spiritually mature, well-equipped, church-based ministry leaders and to explore how these factors can be effectively incorporated into the training design of a local church. Rather than fixating on 'content', this project intentionally focuses on the aspect of 'design' and seeks to identify through research specific design

elements that help to facilitate transformational leadership development in the context of the local church.

Delimiting the focus to church-based ministry leaders, the primary objectives of this research project are:

- (1) To identify design elements fundamental to the creation and implementation of transformational church-based leadership development strategies.
- (2) To compile a set of recommended practices to guide local churches in the design of effective leadership development programs and processes.

In an effort to accomplish these objectives, the following questions are being considered.

- What role does 'design' play in a transformational leadership development strategy; and how should instructional design theory inform the design of church-based leadership development strategies?
- How should adult learning theory inform the design of church-based leadership development strategies?
- How can the leadership development strategies practiced by Jesus and Paul inform the design of leadership training processes in the local church?
- What principles and practices can be gleaned from existing international and local models of church-based leadership training?
- How can research on leadership development strategies and best practices inform the design of leadership training processes in the local church?
- What role do cultural considerations play in the design of an effective leadership development strategy in the South African church?

1.4 Research Design and Methodology

Though consideration was given to an empirical study, the dearth of existing scholarship on the role and influence of 'design' in transformational church-based

leadership training lends itself to a broader conceptual approach. Rather than undertaking an empirical study of a few churches, this project challenges perspectives on leadership development in the local church and proposes a 'theory of action' intended to better equip local churches in South Africa and other nations to create their own leadership development strategies in fulfillment of God's missional purposes for the church.

In an effort to develop a broad-based perspective, the research design for this project involves:

- a review of literature produced by scholars and practitioners in the disciplines of instructional design and adult learning.
- an analysis of specific biblical passages and scholarly perspectives on leader development in the New Testament.
- descriptive overviews of three international church-based training models and proprietary church-based models used in two South African cell churches.
- scholarly commentary on best practices in the development of leaders in organizations.

Each section is approached independently. Findings are synthesized at the end of the project.

In an effort to identify design principles and practices that can be applied toward the development of a transformational church-based leadership development initiative, this project engages with historical and contemporary scholarship in the dynamic fields of instructional design and adult learning. While the history of each discipline is given consideration, research for the purposes of this project focuses on prominent theories and models that might be applicable to the church-based training context. Rather than arbitrarily selecting specific theories and models, this project examines a cross-section of prominent theories and models in each field. Though this adds length to the project, it provides a helpful overview for those unfamiliar with these disciplines.

In the field of instructional design, the following models are considered.

- Gagne's conditions of learning and events of instruction
- The Dick and Carey systems approach model
- The Smith and Ragan model
- The Morrison, Ross, and Kemp (MRK) model
- The ADDIE model of instructional systems design
- Backward design
- Wiles' R2D2 constructivist model
- Vella's design steps for dialogue education

Though all of these models can be used 'as is' in the local church, an attempt is made to glean simplified, generic principles that can be applied toward the design of church-based leadership development programs and processes. It is important to note that complex or 'expert' models have been deliberately avoided. The models examined were developed with the non-expert in mind.

Adult learning theory centers on how adults learn and, thus, has the potential to play a significant role in the design of church-based leadership training processes. Nine key adult learning perspectives and models are examined with a view toward identifying principles and practices that can enhance the effectiveness of adult learning processes in the local church. The adult learning theories and models considered are:

- Behaviorism
- Cognitivism
- Social cognitive theory
- Andragogy
- Experiential learning and learning styles
- Constructivism
- Multiple intelligences
- Transformative learning
- Holistic learning

Though not all of these theories and models are equally relevant to local church leader development, each makes a contribution to our understanding of how

adults learn and, in some way, informs the design and development of effective learning processes.

More than any other source, scripture provides the inspiration, mandates, and foundational perspectives concerning the development of Christian ministry leaders. As such, this project analyzes a number of specific biblical passages and scholarly perspectives on leader development in the New Testament. Particular attention is paid to the example and teaching of the Lord Jesus and the apostle Paul. Supplementing this biblical content are theoretical perspectives and practices highlighted by scholars and practitioners. From both of these a number of insights are gleaned that serve to inform the design of transformational church-based training processes.

In order to provide some sense of what elements should be included in a church-based leadership training process, consideration is given to three international church-based training models and two proprietary South African church-based models. Included in this project are descriptive overviews of models offered by BILD International (and the Antioch School), The Centers of Church-based Training, and LeaderSource Strategic Global Alliance, as well as Maranatha Community Church in Kempton Park and Little Falls Christian Centre in Roodepoort. Though the characteristics of each model are described, no attempt is made at evaluation. The international models were selected because of their prominence in the church-based training movement. Maranatha Community Church and Little Falls Christian Centre were selected because they are growing churches committed to discipleship through small groups, develop their own leaders, utilize models that can be emulated, and have been very successful at facilitating the development of people right through to pastoral level. In addition to examining international and local church models, this section considers important insights on the development of leaders in organizations from key scholars in organizational theory.

By analyzing and synthesizing scholarship on instructional design theory, adult learning theory, the leadership development strategies of Jesus and Paul, and 'best practices' in organizations, and by examining international and local models of church-based leadership development, this research project seeks to identify

elements critical to the design of learning strategies that develop spiritually mature leaders who are sound in their knowledge and application of scripture and equipped with the skills needed for effective ministry. Research findings are synthesized to formulate a 'theory of action' expressed in a set of 'recommended practices' coupled together with a design template to assist local churches in the design and implementation of transformational leadership development strategies.

1.3 Delimitations

The focus of this research project is *design*, the 'how' of leadership training and development, as opposed to content (the 'what'). Emphasis is placed on critical elements of design in the overall training strategy — elements that could significantly influence the outcome of a church's leadership development efforts. This project does not examine specific curricula or courses in detail, although three international and two local church-based leadership training models are briefly considered. Though this research project engages with existing scholarship from around the world, application focuses on South African churches committed to developing their own leaders.

It is not the intent of this project to develop a model, but rather a set of 'recommended practices' to assist local churches to develop their own context-specific strategies for transformational church-based leadership training, with a view toward the fulfillment of God's missional purposes in and through the church. Though practical theology projects often result in the development of a 'model', this researcher believes that local churches need to develop their own models based on their own unique needs and context. It is envisioned that the findings of this research project will assist churches in this important process.

Swinton and Mowat (2006:256-257) stated,

Within the social-scientific model of action research, the focus of action tends to be on generating solutions to particular problems. Practical Theology has a wider theological remit which involves challenging current practices in the hope that they will move closer

towards faithfulness. This requires more than simply problem-solving. It involves consciousness-raising: a process of highlighting the fact that the way in which we often think the world is in fact quite different from the way that it actually is when explored through a theological lens.

Practical Theology seeks to inspire and direct new modes of action/practice which will enable individuals and communities to function, not more effectively, but more faithfully.... The practical theologian has an understanding of 'action' that offers a perspective which differs from the standard assumptions of action research. Heitink (1999:126) suggests that action within the context of Practical Theology should be understood in this way: 'To act is to pursue a goal, to work toward an intentional and active realization of certain plans, by utilizing specific means in a given situation.' In other words ... there is an end or *telos* that transcends all particular forms of action. This *telos* constitutes the primary purpose and meaning of human life and the eschatological horizon of the practical-theological enterprise. For the practical theologian, action is not merely pragmatic or problem-solving, although it may contain elements of this. For the practical-theological action always has the goal of interacting with situations and challenging practices in order that individuals and communities can be enabled to remain faithful to God and to participate faithfully in God's continuing mission to the world.

In harmony with this perspective, the ultimate purpose of this project is to better equip local churches to develop biblical leaders who can effectively fulfill God's revealed purposes for the church of Jesus Christ.

1.5 Definitions and Concepts

For the purposes of this project, *church-based leadership development* is a descriptive term applied to an intentional process *within* a local church to disciple

potential leaders toward spiritual maturity, to develop ministry skills and giftedness, and to facilitate the emergence of leaders into their God-ordained roles in the church of Jesus Christ.

A popular buzzword, the term *transformation* has been variously applied in a number of disciplines. In the context of this project, the words *transformation* and *transformational* are used in a biblical sense. In Romans 12:2, Paul exhorted his readers, “Do not be conformed to this world, but be transformed by the renewing of your mind, so that you may prove what the will of God is, that which is good and acceptable and perfect”.⁴ In contrast to being “conformed” (συσχηματίζεσθε) to the surrounding culture and world system, God’s people are to be “transformed” (μεταμορφοῦσθε), so that the outer expression of their lives matches the inner reality described in Romans chapters 6-8. *Transformation* implies a process of ‘inside-out’ change. As such, leader development that is transformational not only develops skills, but, more importantly, challenges paradigms, impacts values and root beliefs, changes thinking, accentuates spiritual formation, develops character, motivates compassion, clarifies purpose, and influences practice. The process of transformation becomes increasingly evident as the Christ within manifests in Christlikeness without!

This process of transformation involves *transformative learning*, a deep and often profound structural shift in basic assumptions and “premises of thought, feelings, and actions” (O’Sullivan, Morell, and O’Conner 2002:11). As O’Sullivan et al. explained, transformative learning involves “a shift of consciousness that dramatically and permanently alters our way of being in the world”, including “our understanding of ourselves and our self-locations....” Transformative learning affects worldview and changes the way people perceive reality. This, in turn, affects attitudes, decision-making, and behavior.

The term *leadership* has about as many definitions as there are ‘definers’! In the context of this project, the focus is on Christian leadership and, in particular, the development of spiritual leaders in the local church. Clinton (1988:127)

⁴ Unless otherwise noted, all Scripture quotations are taken from the New American Standard Bible, The Lockman Foundation, 1995.

described a Christian leader as “a person with God-given capacity and God-given responsibility who influences a group of followers towards God’s purposes for the group.” Malphurs (2003:33) described a Christian leader as a servant with “credibility and capabilities” who is “able to influence people in a particular context to pursue their God-given direction”. Northouse (2010:3) described leadership as “a process whereby an individual influences a group of people toward a common goal”. Burkus (2011:5) defined leadership as “the process of influencing others to work toward a mutually desired vision”. The common thread among these definitions is obvious.

Clinton (1988:245) defined *leadership development* as the “measure of a leader’s changing capacity to influence, in terms of various factors, over time”. The term also refers to “the actual patterns, processes, and principles that summarize development” (Clinton 1988:245). Van Velsor and McCauley (2004:2) described leader development as “the expansion of a person’s capacity to be effective in leadership roles and processes”.

Other key terms are defined in the course of the study.

1.6 Overview

This dissertation includes seven chapters. The first chapter provides essential background and introduces the research problem, objectives, and design. Chapter two focuses on the purpose and nature of instructional design. A number of theories and perspectives are examined with a view toward identifying key concepts that can be applied to the design of church-based leadership training. The third chapter reviews the extensive field of adult learning, weighing the strengths and weaknesses of nine theories in an effort to identify methodologies that might promote more effective learning in leadership development programs and processes. Chapter four examines leadership emergence in the New Testament. Attention is given to the biblical mandates for leadership development, the methods employed by both the Lord Jesus and the apostle Paul, and the critical role of the Holy Spirit in transformation. The fifth chapter examines the ‘be-know-do’ developmental model, three international and

two local church-based leadership development models, and selected perspectives on leadership development in organizations. The heart of the dissertation, chapter six examines scholarship on best practices in leadership development and synthesizes this with content from previous chapters to develop a theory of action in the form of a set of recommended practices and a template to guide local churches in the design of transformational programs and processes of leadership development. Chapter seven concludes the dissertation with an overview of the project, a summary of findings, suggestions for further research, and a final challenge.

1.7 Conclusion

Ultimately, God facilitates the development of leaders in the body of Christ; but we, as humans, can enhance or hinder this process. Emerging leaders affect their own growth and development by how closely they cooperate with God. Churches enhance or hinder this process through their perspectives, policies, planning, and practices. If South Africa churches are to be successful in raising up spiritual leaders who are Christlike, knowledgeable, and skilled in ministry, then it behooves them to work closely with the Holy Spirit to design and implement programs and processes that will achieve this end. How to do that is the focus of this project.

Chapter Two

An Overview of Instructional Design

2.1 Introduction

God is a God of design. We see his handiwork in the universe, the ecosystem, and the human body. All that God originally designed was perfect in form and function. Though human sin has tainted the perfection of God's creation, its design continues to fascinate and enthrall schoolchildren and scientists alike. God's design is not only evident in creation, but also in how he chooses to interact with humankind. When Israel was commissioned to construct the Tabernacle in the wilderness, God provided Moses with an intricate, symbolic, and instructional design. So important was this design that God said, "According to all that I am going to show you, as the pattern of the tabernacle and the pattern of all its furniture, just so you shall construct it" (Exodus 25:9). He later gave David similar details for the design of the Temple (1 Chronicles 28:19). Indeed, before this world was ever made, God had already designed a plan to redeem humankind from the ravages and sin and death (Ephesians 1:4, 2 Timothy 1:8-9, 1 Peter 1:20).

Design plays a significant role in all that God does, even in the development of leaders. Throughout scripture, we see God at work in the lives of people like Abraham, Moses, Samuel, David, Elijah, Daniel, Peter, Paul, and so many others, developing them into people he can use to accomplish his purposes. Based on the detailed study of these and other biblical, historical, and

contemporary leaders, Clinton's (1988, 1989) *leadership emergence theory* suggests that God intentionally and purposefully grows leaders through a number of stages toward what Clinton calls 'convergence', a time of maximum influence and fruitfulness in the leader's life. Though God works sovereignly in a person's life, the emergence of a leader is a function of his or her response to various forms of God-ordained (or permitted) 'processing' over a lifetime (Clinton 1989:77). Sadly, Clinton's research suggests that only about one in three Christian leaders ever reach their full potential.

Though leadership emergence theory articulates God's sovereign work in the life of the emerging leader and the importance of the emerging leader's response, existing leaders also play a crucial role in the development of emerging leaders. According to Clinton (1989:14), "Effective leaders recognize leadership selection and development as a priority function". The simple fact is that leaders build leaders (Webber 2008a:70). As Webber (2008a:70) noted, "Leader development is best accomplished by leaders who personally work with the emerging leaders and give general oversight to the use of all other influences in their lives and ministries". It is in this facilitative, developmental role that design takes on such great significance. *How* spiritual leaders 'build' into the lives of potential leaders is instrumental in their development. No one illustrates this more effectively than the Lord Jesus himself! Emphasizing the importance of this 'building' process, the apostle Paul stated, "According to the grace of God which was given to me, like a wise master builder I laid a foundation, and another is building on it. But each man must be careful how he builds on it" (1 Corinthians 3:20).

To the casual observer, the approach used by Jesus to develop his disciples may appear somewhat random. However, Jesus employed a very deliberate strategy in the training of the Twelve; and this strategy was critical to the outcome. Jesus had a clear developmental goal in mind for the Twelve; and the processes he used were intended to accomplish that goal. As Webber (2008a) noted, good design always begins with the desired 'end result' or 'destination' in mind. Once the destination is clear, the journey to the destination can be mapped. This is the essence of design.

The purpose of design in any teaching, training, or developmental context is to enhance learning. According to Freeman (2006), effective design in leadership development requires a systemic learning process oriented around the learner and predicated upon answers to four essential questions. What does the learner know now? What does the learner need to know? What conditions will affect and facilitate his or her learning? How will you know when he or she learns it?

Design goes beyond the mere planning and structuring of learning sessions. In the context of Christian leadership development, it entails the intentional and prayerful development of a long-term transformational learning process that affects the whole person.

Academic institutions, corporations, non-profit ministries, churches, and organizations of every type all over world continually face the challenge of finding the most effective and efficient means of achieving learning results that increase individual competence, further organizational purposes, and provide a worthwhile return on investment. Driven by this perpetual need for training and development, twentieth century educational psychologists pioneered the field of *instructional design* to identify methods of instruction that support and facilitate learning and the situations in which those methods should and should not be used (Reigeluth 1999:6). From its humble beginnings in the war-driven American economy of the early 1940s, the field of instructional design has blossomed into a dynamic, highly interactive discipline influenced by key theoreticians, characterized by a proliferation of design models, and informed and reformed by ongoing research.

In light of the critical need for transformational leadership development in the African church, church leaders, trainers, and curriculum designers have much to learn from this field. If the African church is ever to address its growing leadership needs, it is incumbent upon those involved in training and development to pursue a working knowledge of key principles and practices in instructional design.

2.1.1 An Overview of This Chapter

This chapter examines scholarly literature on instructional design. After considering definitions and purposes of instructional design, attention is given to foundational and historical influences on the development of this field. A number of prominent conditions-based theories and models are then examined, as well as alternative ideas that have arisen as a result of recent constructivist trends in education and training. Due to the church-based emphasis of this project, instructional design models specifically focused on computer-assisted training and e-learning, and those that require a high level of expertise, are not considered. This chapter concludes with a brief consideration of the value of instructional design for leadership development in the South African church.

2.1.2 Definitions and Purposes of Instructional Design

In spite of the prominence of this field, there is no single, widely embraced definition of instructional design. In addition, there is no uniform agreement among scholars concerning the exact nature of instructional design, with some viewing the field in theoretical terms and others preferring to think in terms of 'process'.

A leading theoretician in the field, Charles Reigeluth (1999:5) described instructional design theory as "a theory that offers explicit guidance on how to better help people learn and develop", not just in the cognitive realm, but in the emotional, social, physical, and spiritual realms as well. Distinguishing between the theory and the process, Reigeluth (1999:13) stated,

Instructional-design theory concerns what the instruction should be like (i.e., what methods of instruction should be used) not what process a teacher or instructional designer should use to plan and prepare for the instruction. Other common terms that characterize this distinction are instructional theory, instructional model, and instructional strategies to represent instructional-design theory; and instructional development (ID) model or instructional systems development (ISD) process to represent instructional-design

process. However, instructional-design theories and instructional-design processes are also closely related. Different theories require differences in the process used to apply those theories to particular situations.

Embracing a practice-oriented perspective, Reiser and Dempsey (2007:11) defined instructional design “as a systematic process that is employed to develop education and training programs in a consistent and reliable fashion”. Smith and Ragan (1999:2) characterized instructional design as “the systematic and reflective process of translating principles of learning and instruction into plans for instructional materials, activities, information resources, and evaluation”. Morrison, Ross, and Kemp (2001:3) described instructional design as a systematic process based upon learning theories, information technology, systematic analysis, and management methods that helps educators and trainers “plan, develop, evaluate, and manage the instructional process effectively so that so that it will ensure competent performance by learners”. Berger and Kam (1996) viewed instructional design as

the systematic development of instructional specifications using learning and instructional theory to ensure the quality of instruction. It is the entire process of analysis of learning needs and goals and the development of a delivery system to meet those needs. It includes development of instructional materials and activities, and tryout and evaluation of all instruction and learner activities.

Gustafson and Branch (2007:11) described instructional design as “a systematic process that is employed to develop education and training programs in a consistent and reliable fashion”.

Perhaps the simplest explanation is provided by Piskurich (2006:1), who stated,

Instructional design stripped to its basics is simply a process for helping you create effective training in an efficient manner. It is a system — perhaps more accurately a number of systems — that helps you ask the right questions, make the right decisions, and

produce a product that is useful and usable as your situation requires and allows.

Reigeluth's (1999:13) distinction between instructional design theory and process is not fully embraced, with scholars in the field acknowledging considerable confusion about the meaning and correct use of terminology. Bichelmeyer (2003), in particular, criticized Reigeluth's (1993, 1999) seminal 'green books', *Instructional Design Theories and Models* volumes 1 and 2, for confusing readers by including so much theoretical content on instruction in books purportedly focused on instructional design. In an important response, Reigeluth (2003) attempted to clear the "muddy waters", confessing that the true confusion is found in the terminology used by professionals in the instructional design field. As a solution, Reigeluth (2003) proposed that professionals use "ISD process" (instructional systems design) to describe the systematic process of analysis, design, development, implementation, and evaluation, since there is general agreement on the meanings of those terms, and that the terms "design" and "development" be reserved for the specific parts of the ISD process. In spite of this response, Reigeluth's definition of 'instructional-design' theory does seem to place stronger emphasis on instruction than design.

The fluid and somewhat confusing use of terminology is also evident in Reiser's description of the closely related field of instructional design and technology. Reiser (2001:57) stated,

The field of instructional design and technology encompasses the analysis of learning and performance problems, and the design, development, implementation, evaluation and management of instructional and noninstructional processes and resources intended to improve learning and performance in a variety of settings, particularly educational institutions and the workplace....

Reiser (2001:57) noted that this definition features the six primary activities usually associated with the field, including an emphasis on research, theory, and practice as important and a recognition of the influence the relevant technology has had on practices. More importantly, it highlights the two practices at the core

of this field — the use of media in instruction and the use of “systematic instructional design procedures”.

Willis (1995:5) also commented on the confusion.

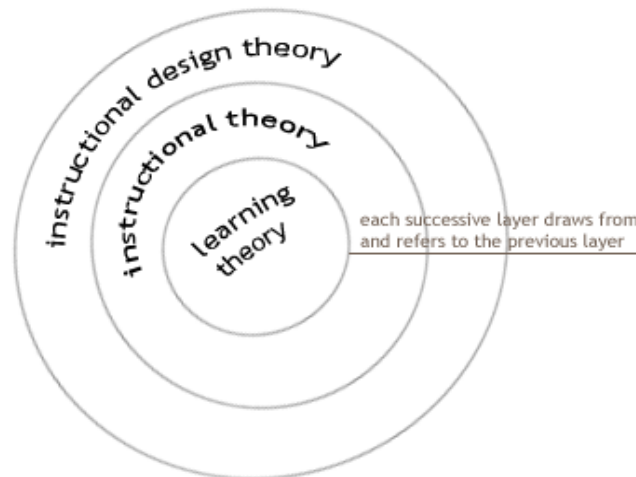
[T]he term *instructional design* has so many meanings that its use has little purpose without further elaboration. In some publications, the term roughly refers to the field called *educational technology* ... (e.g., Reigeluth 1983). In others, the term is used to describe the practice of educational technology from a particular theoretical perspective such as behaviorism (Gropper 1987). *Instructional design* may also be the umbrella term indicating the components that should be included in an instructional package (Merrill 1988). The phrase has also been used to indicate the *process* [while] others have used it to mean a particular model or theory that can guide the design of instruction (Wright and Conroy 1988).

Smith and Ragan (1996:147) made a clearer distinction. “Instructional design models employ instructional theories to prescribe types and levels of instructional support to optimize the achievement of identified learning goals.” Instruction is described as “the intentional facilitation of learning toward identified learning goals” (Smith and Ragan 1999:2). Approaching from a slightly different angle, Driscoll (2000:345) defined instruction as “the deliberate arrangement of learning conditions to promote the attainment of some intended goal”. In both definitions, instruction is viewed as an intentional arrangement of experiences that leads to the acquisition of specific competencies by learners. It seems that what Reigeluth terms ‘instructional-design theory’ might be better rendered as ‘instructional theory’.

Bichelmeyer (2003) contended with Reigeluth for focusing on instructional theory in volumes that purportedly focus on instructional design. In layman’s language, she drew a distinction between instructional theory and instructional design, clearly illustrating the hierarchical relationship among learning theory, instructional theory, and instructional design theory (see Figure 2.1).

Figure 2.1: Relationship Among Theories

(Bichelmeyer 2003)



While both instruction and instructional design are based on and derived from theories of learning, these are two different activities based on different contexts, different objectives, different activities and different concerns. Questions of how instructional designers should design instruction, how instructors should deliver instruction, and ultimately of how learners learn are very different, and each is a very important question in its own right (Bichelmeyer 2003).

2.1.3 Characteristics of Instructional Design

Describing his particular perspective on the nature of instructional design, Reigeluth (1999:13) commented,

In contrast to learning theories, instructional-design theories are more directly and easily applied to educational problems, for they describe specific events outside of the learner that facilitate learning (i.e., methods of instruction), rather than describing what goes on inside a learner's head when learning occurs.

Reigeluth (1999:6-7) described four characteristics common to the various expressions of instructional design theory. Unlike most theories, instructional design theory is “*design-oriented* (focusing on means to attain given goals for learning or development) rather than *description-oriented* (focusing on the results

of given events)". As such, it is prescriptive in nature. Reigeluth (1999:6) added, "Being design oriented makes a theory more directly useful to educators, because it provides direct guidance on how to achieve their goals". In addition to its prescriptive nature, instructional design theory "identifies *methods* of instruction (ways to support and facilitate learning)" and "*situations* in which they should and should not be used" (Reigeluth 1999:6). Furthermore, the various methods of instruction used by the designer can be broken into more detailed *component methods*, providing additional guidance to educators. Finally, instructional design methods "are *probabilistic* rather than deterministic" (Reigeluth 1999:7). Selected methods of instruction increase the likelihood that a learning goal will be reached; but they cannot guarantee it.

Though Reigeluth describes instructional design theory primarily in terms of methods of instruction and the situations in which they should be used, most leaders in this field depict instructional design in the form of models that can be used to design instructional processes. These models serve as "a simple representation of more complex forms, processes, and functions" and "help us conceptualize representations of reality" (Gustafson and Branch 1997:17).

For the purposes of this project, the term 'instructional design' is applied primarily to the design process. However, when the term 'design' is used alone as a noun, it refers to the various components and aspects intentionally included in the overall learning process.

Models of instructional design abound; but most fit into one of three classifications or orientations — classroom, product, or system (Gustafson and Branch 2002:12). *Classroom models* focus primarily on single lessons or presentations and are most appropriate for primary and secondary schools, vocational colleges, universities, and any other classroom-based learning environments such as a single lesson, seminar, or short series in a church-based leadership training track. *Product-oriented models* focus on the creation of new instructional products such as self-study courses and computer-based training. Since products of this nature are designed to be used by learners with little more than the occasional outside facilitator, considerable effort goes into trials and revision. *Systems-oriented models* are most often applied to the development of

courses or major systems of instruction. Systems-based models have a broad scope and typically divide the instructional design process into a number of interrelated, comprehensive phases (van Merriënboer 1997:2-3), starting with the analyses of instructional problems and learners, followed by the design, development, implementation, and evaluation of instructional procedures and materials intended to solve those problems, all in a managed system (Reiser 2001:58). This third model is best suited to the design of a church-based approach to leadership development.

Regardless of application, Gustafson and Branch (2002:21) have identified six characteristics that should be present in all instructional design efforts. From their perspective, instructional design should be learner-centered, goal-oriented, focused on real-world performance, characterized by measurable outcomes, empirical (based on reliable data and feedback), and team-driven.

2.1.4 Major Assumptions Underlying Instructional Design

Smith and Ragan (2004:22-23) highlighted a number of critical assumptions that underlie the instructional design process. These are summarized below.

- (1) The designer has a clear sense of what the learner is to learn as a result of the instruction.
- (2) The best instruction is effective, efficient, and appealing. It facilitates learning of the prescribed knowledge and/or skills, requires the least possible amount of time and effort to achieve the objectives, and motivates learners to persevere in the learning task.
- (3) A 'live teacher' is not always necessary. Students can learn from many different media:
- (4) Certain principles of instruction apply across all age groups and all content areas. In particular, active learning is important. Learners need to engage with the material mentally as well as physically.
- (5) Evaluation of instruction is used to make it more efficient, effective, and appealing.
- (6) Learners are evaluated in terms of achievement of instructional objectives rather than by comparison with one another.

- (7) Congruence among objectives, learning activities, and assessment are important. The learning objective(s) must drive decisions about activities and assessment.

Adopting a slightly different approach, Morrison, Ross, Kalman, and Kemp (2011:10-12) listed seven specific premises which they believe should underlie instructional design.

- (1) The instructional design process requires attention to both a systematic procedure and specificity for treating details within the plan.
- (2) The instructional design process starts by identifying an instructional problem.
- (3) An instructional design plan is developed primarily for use by the instructional designer and planning team.
- (4) While planning, every effort should be made to provide for a level of satisfactory achievement rather than minimal achievement for all learners.
- (5) The success of the instructional product is dependent on the accuracy of the information flowing into the instructional design process.
- (6) The instructional design process focuses on the individual rather than the content.
- (7) There is no single best way to design instruction.

As Morrison et al. (2001:11) noted, “The proof of an instructional plan’s success will be whether a satisfactory level of learning is achieved in an acceptable period of time”.

2.1.5 Core Questions in the Instructional Design Process

Using the analogy of an “instructional engineer”, and drawing from Mager’s (1984) work on instructional objectives, Smith and Ragan (1999:5) highlighted three major questions that every instructional designer must consider.

- 1) “Where are we going?” (What are the specific objectives of the instruction?)
- 2) “How will we get there?” (What instructional strategy and instructional medium will best accomplish the goals?)
- 3) “How will we know when we have arrived?” (How can we best assess the learners’ success in achieving the learning objectives? How should we evaluate and revise the instruction?)

As Smith and Ragan (1999:5) noted, these questions translate into the three essential activities of instructional design.

- (1) To determine ‘where we are going’, analysis is performed.
- (2) To determine ‘how we will get there’, an instructional strategy is developed.
- (3) To determine ‘how we will know when we are there’, an evaluation is conducted.

Though these questions/steps seem simplistic, they do represent essential stages in the instructional design process.

Enhancing the dimension of analysis, Morrison et al. (2011:14) added a question about the learners themselves.

- (1) For whom is the learning program being developed? What are the characteristics of learners or trainees?
- (2) What is it that the learners or trainees must learn or demonstrate? What are the objectives?
- (3) How can the content or skill be best learned? What instructional strategies are the most appropriate for the learners, subject matter, and context?
- (4) How do you most effectively assess the extent to which learning goals have been achieved?

“These four fundamental components — learners, objectives, methods, and evaluation — form the framework for systematic instructional planning” (Morrison et al. 2011:14).

2.2 Influences on the Development of Instructional Design

This section examines various factors that have influenced the development of instructional design, including theoretical foundations and several key historical and theoretical developments in the fields of learning and instruction.

2.2.1 Foundations of Instructional Design

At its most basic level, instructional design has two ‘parents’ — systems engineering and behaviorist psychology (Molenda 1997:42). Identifying other foundational influences as well, Smith and Ragan (1999:14-23) traced instructional design’s theoretical roots to not only systems theory and learning theory, but to communication theory and instructional theory as well. Each of these foundational bases is examined briefly below.

Figure 2.2: Theoretical Bases of Instructional Design

(adapted from and Ragan 1999:23)



2.2.1.1 Systems Theory and Instructional Design

According to Molenda (1997:42), by the end of World War 2, the U.S. military had adopted a ‘systems approach’ to training and development. Driven by educational psychologists in the post-war era, the systems approach to training and training design was increasingly embraced by the business world. Within a decade, systems-based instructional design began to emerge as a distinct field; and, by the mid-sixties, several major American universities had developed their own systems-based approaches to the design of instruction. As such, systems theory is part of the DNA of instructional design theory and practice.

Supporting this view, Richey, Klein, and Tracey (2011:11) regard general systems theory (GST) as a key element in the theoretical family tree of instructional design, with systems theory principles shaping the direction and orientation of the majority of procedures used in instructional design.

Describing their understanding of a 'system', Dick, Carey, and Carey (2005:1-2) commented,

The term *system* has become very popular as more and more of what we do is interrelated with what other people do. A system is technically a set of interrelated parts, all of which work together toward a defined goal. The parts of the system depend on each other for input and output, and the entire system uses feedback to determine if its desired goal has been reached. If it has not, then the system is modified until it does reach the goal.

Applying this to their own approach, Dick and Carey (1996:2) described instruction as “a systematic process in which every component (i.e., teacher, learners, materials, and learning environment) is crucial to successful learning....” Those who hold to this perspective tend to employ a systems approach to the design of instruction (Dick and Carey 1996:2).

In the context of instructional design, the 'system' is a set of components within a plan, the goal of which is the solution of a particular learning problem or need. The four common components of an instructional design model — analysis, strategy development, evaluation, and revision — are actually common to systems approaches used in a number of disciplines and align closely to the generalized model of problem solving (Smith and Ragan 1999:11, 15).

According to Dick et al. (2005:2), the instructional system itself includes the learners, instructor, instructional materials, and learning environment. These components interact in order to achieve a single purpose — learning! To ascertain if learning is taking place, a process of assessment is used. If learners seem to be underperforming, the effectiveness of the system must be improved in order to achieve the desired learning outcomes.

A systems view of instruction enables a designer to see the importance of every component in the process. To achieve the desired learning outcomes, every component must function effectively. As such, every component in the system must be assessed, and changes made if learning is unsatisfactory (Dick et al. 2005:2).

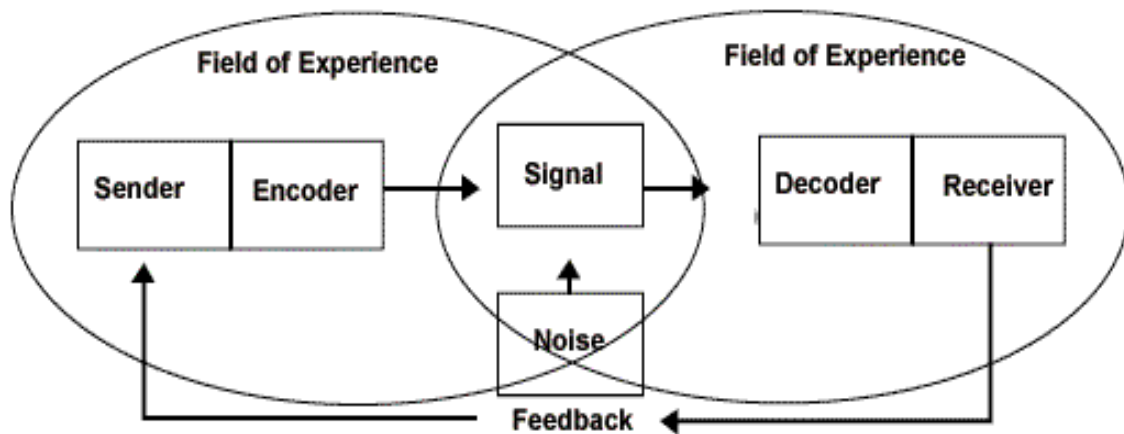
Dick et al. (2005:10) emphasized the importance of distinguishing between the *process* of designing instruction and the *delivery* of that instruction. The systems approach is applied to the process of design. Instructors, exercises, modules, and various media are delivery mechanisms. A major task in the design process is determining how instruction can be most effectively delivered (Dick et al. 2005:10).

2.2.1.2 Communication Theory

This section briefly examines two theories of communication — Schramm's (1956) model and relevance theory (Wilson and Sperber 1986, 2004). Though developed primarily to explain events in the exchange of information, theories of communication have had an impact on the development of instructional design theory and practice, primarily in the area of media selection and the development of instruction (Smith and Ragan 1999:15). One of the most helpful contributions to communication theory has been the development of models demonstrating how information is transferred from one person to another.

Wilbur Schramm's (1956) model describes the process of communication between a sender and a receiver and emphasizes the role of humans in encoding and decoding messages. Significantly, the model indicates that certain factors in the sender's and receiver's respective fields of experience may influence how a message is encoded and/or decoded. In other words, the way a message is portrayed by a sender and interpreted by a receiver is heavily influenced by the prior experiences of each (Smith and Ragan 1999:15). This would have obvious implications for instructional design.

Figure 2.3: Adapted Version of Schramm's 1956 Model of Communication
(Smith and Ragan 1999:16)



The model also incorporates the concept of feedback, a fundamental aspect of instructional systems design. Smith and Ragan (1999:15) observed that in genuine communication, there is a message from the sender and a response by the receiver. The response often causes the original sender to alter the message. This feedback process plays an important role in both instruction and formative evaluation.

In addition, this model recognizes the interfering role that 'noise' plays in communication. As Smith and Ragan (1999:15) noted, the instructional message is vulnerable to distortion through competing stimuli or poor quality transmission, two common examples of noise.

Though encoding and decoding play a role in interpersonal communication, code theory cannot account for every aspect of the communication process. Inspired by the work of Grice (1957, 1968, 1989), and developed by Sperber and Wilson (1986), relevance theory is a theory of communication that seeks to explain how a receiver 'infers' a communicator's intended meaning. At its core, relevance theory claims that "the expectations of relevance raised by an utterance are precise enough, and predictable enough, to guide the hearer towards the speaker's meaning" (Wilson and Sperber 2004:250). Previously, Grice (1989) had claimed that a central aspect of human communication, whether verbal or non-verbal, is the expression and recognition of intention. Building on this,

Sperber and Wilson (1986, 1987) developed an inferential model of communication. In this model, a communicator (in certain ways) provides evidence of his or her intention to convey a particular meaning, which is “inferred by the audience on the basis of the evidence provided” (Wilson and Sperber 2004:249).

As Wilson and Sperber noted (2004:251), the search for relevance is a key aspect of human cognition. Input is relevant to a person when it connects with existing information to yield a conclusion that is of personal importance. In terms of the theory, input is only ‘relevant’ when processing makes a positive difference in a person’s understanding of their world. This is called a *positive cognitive effect*. Cognitive effect is evident when assumptions are strengthened, revised, or even abandoned. A *contextual implication* is a noteworthy cognitive effect in which a conclusion is drawn from the input and the context together. Contextual implications often achieve relevance by combining with other contextual assumptions to yield additional implications. .

As the *cognitive principle of relevance* states, “Human cognition tends to be geared to the maximization of relevance” (Wilson and Sperber 2004:255). However, not all inputs in a particular context have the same value to an individual. Relevance is assessed in terms of cognitive effects *and* processing effort. “Other things being equal, the greater the positive cognitive effects achieved by processing an input, the greater the relevance of the input to the individual at that time” (Wilson and Sperber 2004:252). On the other hand, “Other things being equal, the greater the processing effort expended, the lower the relevance of the input to the individual at that time” (Wilson and Sperber 2004:253). Individuals are often faced with multiple inputs. When similar amounts of effort are required to process inputs, cognitive effect determines the various degrees of relevance. When similar amounts of effect can be achieved, the amount of required effort is decisive in determining relevance (Wilson and Sperber 2004:253).

The cognitive tendency to maximize relevance makes it possible for a communicator to influence a hearer. This takes place through *ostensive-inferential communication*, “the intention to inform an audience of something”

coupled with “the intention to inform the audience of one’s informative intention” (Wilson and Sperber 2004:255). Understanding is achieved when the hearer/audience recognizes the informative intention, whether or not they choose to fulfill the intention. Ostensive-inferential communication makes use of an *ostensive stimulus* specifically designed to focus the hearer’s attention on the communicator’s meaning and to convince the hearer that it is worth processing, creating “precise and predictable expectations of relevance” (Wilson and Sperber 2004:256). The *communicative principle of relevance* states that “every ostensive stimulus conveys a presumption of its own optimal relevance” (Wilson and Sperber 2004:255).

For an audience, an ostensive stimulus is *optimally relevant* if it is “relevant enough to be worth the audience’s processing effort” and “the most relevant one compatible with the communicator’s abilities and preferences” (Wilson and Sperber 2004:257). In other words, it has the most effect for the least processing effort. If a communicator desires to convey something he or she considers important, it is vital to make an ostensive stimulus easy to understand and to provide the hearer evidence for compounding cognitive effects that will help the communicator achieve his or her goal. The first interpretation to satisfy the hearer’s expectation of relevance should be the one the speaker intends to convey.

For the hearer, the comprehension procedure is to “follow a path of least effort in computing cognitive effects”, testing various interpretive hypotheses in the order of accessibility. The hearer stops when the expectations of relevance are satisfied (Wilson and Sperber 2004:260). Stated in another way, the most plausible hypothesis about what a speaker means is reached when, in the absence of evidence to the contrary, the hearer follows “the path of least effort” and reaches an interpretation that satisfies his or her expectations of relevance (Wilson and Sperber 2004:260). For communication between a speaker and audience to be successful, the informative intention of the communicator must not only be manifest to the audience (recognizable and accepted as true or probably true), but also mutually manifest to communicator and audience alike (Sperber and Wilson 1986).

Effective communication between human beings is fundamental to any teaching/learning process. As such, it plays a key role in instructional theory and design.

2.1.2.3 Learning Theory

To say that there is an intimate connection between learning theory and instructional design is an understatement. Describing the nature of this important relationship, Smith (1998) observed,

Learning theory is the study of **how people learn**. *Instructional design theory* is the study of **how to best design instruction so that learning will take place**. Instructional design theory, then, is drawn from learning theory.

As Smith and Ragan (1999:16) explained, instructional design is about the promotion of learning; and, for this reason, instructional designers have a great interest in theories that attempt to describe, explain, and predict learning. From an instructional design perspective, Mayer (1982:1040) described learning as a “relatively permanent change in a person’s knowledge or behavior due to experience”. Mayer’s definition assumes that the duration of change is long-term, the locus of the change is either the knowledge in memory or behavior of the learner, and the cause of the change is the experience of the learner in the environment.

The principles and practices exemplified in contemporary instructional design find their philosophical antecedents in three prominent but varied approaches to learning — behaviorism, cognitivism, and constructivism — all of which are addressed in the following chapter on learning theories. However, to enhance the effectiveness of this review, it is important to consider the influence of these three foundational learning theories on the development of instructional design.

Behaviorism

Behavioral theory stresses the influence of the environment on the learning process. “According to behaviorism, learning has occurred when learners evidence the appropriate response to a particular stimulus” (Smith and Ragan 1999:17). Instructional design models rooted in behaviorism utilize stimulus and response with reinforcement to bring about a modification in behavior. As such, learning is viewed as change in the form or frequency of observable behavior. In the behaviorist perspective, the designer is responsible to create a learning environment that integrates complex muscular and cognitive activities with a view toward the promotion of learning (Boetcher 1998:18-22). To accomplish this, instruction is explicit, directing the attention of learners toward specific learning in a highly structured environment with the various, well-ordered tasks and subtasks broken up into lessons and modules (Deubel 2003). In this learning model, the learners’ realities are convergent. In other words, all learners are brought to a single common reality as the desired outcome.

Cognitivism

Cognitivist models focus on a change in the learner's knowledge state, with knowledge acquisition seen as a mental activity that entails internal coding and structuring by the learner (Ertmer and Newby 1993:50-72). In this approach, learning is viewed as

an active process that occurs within the learner and which can be influenced by the learner..., with the outcome of learning ... not only dependent on what the teacher presents but also on what the learner does to process this information (Dabbagh 2003).

Unlike behavioral theory, cognitive learning theory emphasizes processes within the learner over against environmental factors (Smith and Ragan 1999:18). In the cognitive approach, the instructor/designer endeavors to influence the learner's thought process by providing a mental model for the learner to follow and embrace. The teacher/designer must assist the learner by organizing information in such a way that it can be easily assimilated (Dabbagh 2003). Like

the behavioral approach, this model is convergent. All learners are expected to come to the same reality.

Constructivism

Constructivist models promote the mental ‘construction’ of a learner’s reality. Rather than ‘teaching’ in the usual sense, the instructor serves as a facilitator, providing opportunities that promote conceptual modeling by the learner. In constructivism, learning entails creating meaning from experience, with learners building personal interpretations of the world based on individual experiences and interactions (Ertmer and Newby 1993:50-72). Building on prior knowledge is an important aspect of the constructivist perspective. Boetcher (1998:18-22) noted that constructivist learning is interactive, dialogic, and collaborative in nature. The designer’s/instructor’s role is to understand the learner’s existing cognitive structures and provide appropriate learning activities through multiple real-world contexts, strategies, and coaching that help the learner to construct knowledge (Ertmer and Newby 1993:50-72). Unlike behaviorist and cognitive perspectives, the constructivist model is divergent, with each learner constructing his or her own ‘reality’.

2.2.1.4 Instructional Theory

“Of all theory bases, instructional theories are those that instructional designers draw from most directly” (Smith and Ragan 1999:21). Essentially, instructional theories endeavor to describe characteristics that best support learning and most often find their expression in the intentional choosing and arranging of environmental features to promote learning (Smith and Ragan 1999:21). Instruction can be described in terms of the delivery of information, activities that facilitate learners’ attainment of intended, specific learning goals, and the conduct of activities that are focused on learners learning specific things (Smith and Ragan 1999:2).

Gagné and Dick (1983:264) described instructional theories as

an attempt to relate specified events comprising instruction to learning processes and learning outcomes, drawing upon knowledge generated by learning research and theory.

As Gagné and Dick (1983:264) noted, instructional theories are often prescriptive in nature, since they endeavor to identify specific conditions of instruction that optimize learning and learning transfer. As 'theories', one expects these formulations to provide "a rational description of causal relationships between procedures used to teach and their behavioral consequences in enhanced human performance" (Gagné and Dick 1983:264).

Examples of instructional theories include Bloom's Mastery Learning (1968), Gagné's Conditions of Learning (1965), Keller's ARCS Model of Motivation (1983), brain-based learning, cooperative learning, cognitive coaching, thematic teaching, and problem-based learning.

2.2.2 Historical and Theoretical Influences on the Development of Instructional Design

Historical and theoretical developments over the past sixty years profoundly influenced the development of the field of instructional design. This section briefly examines the birth of instructional design theory, as well as Skinner's programmed instruction, Bloom's taxonomy, and Sweller's cognitive load theory, all of which influenced the development of the field.

2.2.2.1 The Birth of Instructional Design Theory

Educational psychologists of the early twentieth century made the first modern attempts to bridge learning theory and educational practice. According to Tennyson (2010:1), Dewey (1910) was one of the first to envision the idea of a 'linking science' between the emerging field of learning theory and educational practice. About the same time, Thorndike (1913) was seeking to discover research-supported principles of learning that could be applied to the teaching

process (his laws of 'effect' and 'exercise') with a view toward developing "a body of instructional design principles" that included task analysis and methods of teaching (Tennyson 2010:1).

Modern instructional design theory, however, was born out of America's need to train thousands of soldiers and factory workers in a relatively short amount of time during World War 2. According to Reiser (2001:58), psychologists and educators with experience in experimental research were asked by the U.S. government to develop training materials for the military. After the war, a number of these psychologists continued to address instructional problems, leading to the founding of the American Institutes for Research and other similar organizations. Dick (1987:184) reported that psychologists with these organizations increasingly began to view training as a system, developing new approaches to analysis, design, and evaluation. By the fifties, the military had fully embraced the systems approach to training. Pioneers in instructional research like Robert Gagné, Leslie Briggs, and John Flanagan exercised great influence on the development of training courses and materials (Reiser 2001:58). Based largely on B. F. Skinner's research on operant conditioning, these military training programs broke tasks down into smaller and simpler subtasks (with each subtask being treated as a separate learning goal) and utilized a training process designed to reward appropriate performance, correct inappropriate performance, and result in mastery. As one would expect in a behavioral training system, the focus was on observable behavior.

2.2.2.2 Programmed Instruction

In the mid 1950s, ongoing research and the emergence of new theories of learning motivated greater interest in instructional design. Inspired by a visit to his daughter's fourth grade mathematics class, Skinner sought to develop a system of instruction that reduced the load on teachers and recognized the value of immediate reinforcement in learning. This led to the design of the 'teaching machine' and the presentation of a significant paper entitled *The Science of Learning and the Art of Teaching* (1954). Vargas (2005) recalled,

Skinner developed programmed instruction, where through careful sequencing, students responded to material broken into small steps. The steps were similar to what a skilled tutor would ask of a student working with one student at a time. The first responses of each sequence were prompted, but as performance improved, less and less help was given. By the end, a student was doing something he or she could not have done at the beginning.

Programmed instruction employed behavioral objectives, broke instructional content into small units, utilized mechanical devices (the teaching machine), and featured frequent rewards for correct responses. Within a decade, a number of programmed instruction models developed. Lockee, Moore, and Burton (2004:549-552) identified the following components as generic.

- (1) Specification of content and objectives (defining desired behavior, deciding upon content, and delineating objectives)
- (2) Learner analysis (gathering information on entry level skills and knowledge to inform design decisions)
- (3) Behavior analysis (analysis of discriminations, generalizations, and chains to enable the programmer to ascertain which concepts are essential in light of the needs, abilities, strengths, and weaknesses of the target audience)
- (4) Selection of a programming paradigm (a linear, extrinsic approach or an intrinsic, interactive, multi-level approach).
- (5) Sequencing of content. Bullock (1978) noted that, in most cases, the program sequence was characterized by an introduction, diagnostics, an organizational set or section on theory (to help the learner focus on the central elements of the teaching/testing section), the actual teaching, testing, practice, and a review or summary that reinforces the concepts addressed in the program.
- (6) Frame composition. Though there are a number of approaches, a programmed frame might contain a stimulus, which elicits a desired response, an appropriate stimulus context, a response that leads the learner toward the terminal behavior, and material necessary to make the frame readable, understandable, or interesting. Depending upon the

purpose, it may not be necessary to include all of these components in every frame (Taber et al. 1965:90).

- (7) Evaluation and revision (formative and summative evaluation based upon review of content, testing of frames and procedures, analysis by outside experts, and participant feedback).

By the late 1960s, programmed instruction was in decline. Research on its effectiveness over against traditional learning methods had proven inconclusive. At the same time, the value of operant conditioning in the school classroom was being called into question. Nonetheless, during the 1990s, programmed instruction enjoyed a boost with the emergence of the computer-based Integrated Learning Systems, which saw application in schools and management training in the business environment (Pritchard 2009:12). Interestingly, many of today's online and text-based 'self-help' courses are still based on this model. Though no longer prominent, programmed instruction cultivated the seeds of instructional design and it was not long before new models emerged.

2.2.2.3 Bloom's Taxonomy

The publication in 1956 of Benjamin Bloom's taxonomy (a classification of educational learning objectives) gave further impetus to the importance of design in instruction. Bloom (1956:7) and his colleagues identified three learning domains — cognitive (knowledge, mental skills), affective (attitude, emotions, feelings), and psychomotor (physical skills). Each of these domains includes various categories of learning, with higher level learning dependent upon successful attainment of knowledge and skills at lower levels. Though Bloom sought to encourage instruction that involves all three learning domains, most of his initial work focused on the cognitive realm. In his initial publication, *Taxonomy of Educational Objectives, Handbook I: The Cognitive Domain* (1956), Bloom detailed six levels of intellectual behaviors, each one increasing in complexity. These categories — knowledge, comprehension, application, analysis, synthesis, and evaluation — are detailed in Table 2.1 (Clark 2010a).

Table 2.1: Bloom's Taxonomy (Cognitive Domain)

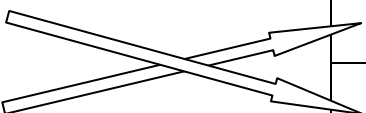
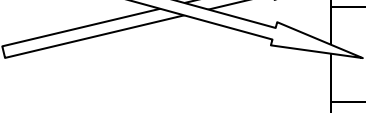
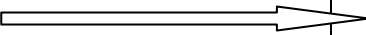
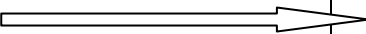
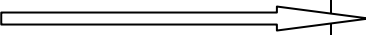
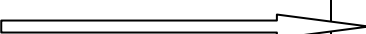
(adapted from Clark 2010a)

Categories of Intellectual Behavior (Simple to Complex)	Examples and Key Words (Verbs)
Knowledge: Recalling data or information.	Examples: Reciting a policy. Quoting prices from memory to a customer. Knowing the safety rules. Key Words: defines, describes, identifies, knows, labels, lists, matches, names, outlines, recalls, recognizes, reproduces, selects, states.
Comprehension: Understanding the meaning, translation, interpolation, and interpretation of instructions and problems. Stating a problem in one's own words.	Examples: Rewriting the principles of test writing. Explaining in one's own words the steps for performing a complex task. Translating an equation into a computer spreadsheet. Key Words: comprehends, converts, defends, distinguishes, estimates, explains, extends, generalizes, gives an example, infers, interprets, paraphrases, predicts, rewrites, summarizes, translates.
Application: Using a concept in a new situation or unprompted use of an abstraction. Applying what was learned in the classroom into novel situations in the work place.	Examples: Using a manual to calculate an employee's vacation time. Applying laws of statistics to evaluate the reliability of a written test. Key Words: applies, changes, computes, constructs, demonstrates, discovers, manipulates, modifies, operates, predicts, prepares, produces, relates, shows, solves, uses.
Analysis: Separating material or concepts into component parts so that its organizational structure may be understood. Distinguishing between facts and inferences.	Examples: Troubleshooting a piece of equipment by using logical deduction. Recognizing logical fallacies in reasoning. Gathering information from a department and selecting the required tasks for training. Key Words: analyzes, breaks down, compares, contrasts, diagrams, deconstructs, differentiates, discriminates, distinguishes, identifies, illustrates, infers, outlines, relates, selects, separates.
Synthesis: Building a structure or pattern from diverse elements. Putting parts together to form a whole, with emphasis on creating a new meaning or structure.	Examples: Writing a company operations or process manual. Designing a machine to perform a specific task. Integrating training from several sources to solve a problem. Revising a process to improve the outcome. Key Words: categorizes, combines, compiles, composes, creates, devises, designs, explains, generates, modifies, organizes, plans, rearranges, reconstructs, relates, reorganizes, revises, rewrites, summarizes, tells, writes.
Evaluation: Making judgments about the value of ideas or materials.	Examples: Selecting the most effective solution. Hiring the most qualified candidate. Explaining and justifying a new budget. Key Words: appraises, compares, concludes, contrasts, criticizes, critiques, defends, describes, discriminates, evaluates, explains, interprets, justifies, relates, summarizes, supports.

In the mid-1990s, Krathwohl and Anderson (2003) formed a committee of cognitive psychologists to review and revise the taxonomy. When the revised taxonomy was released in 2001, several important changes had been made. The taxonomy now deliberately targets primary and secondary school teachers and focuses on alignment in curriculum, instruction, and assessment. There were also changes in terminology. Since thinking is an active process, the nouns in the taxonomy were changed to verbs. The categories *knowledge*, *comprehension*, and *synthesis* were changed to *remember*, *understand*, and *create*. The relative positions of *create* (synthesis) and *evaluate* (evaluation) were also interchanged. The revised taxonomy is illustrated in Table 2.2 below.

Table 2.2: Bloom's Original and Revised Taxonomy of the Cognitive Domain

(adapted from Krathwohl and Anderson 2001)

Original version 1956		Revised version 2001
Evaluation		Create
Synthesis		Evaluate
Analysis		Analyze
Application		Apply
Comprehension		Understand
Knowledge		Remember

The learning categories of the affective domain were addressed by the 1964 release of *Taxonomy of Educational Objectives: Handbook II: The Affective Domain* by Krathwohl, Bloom, and Masia. As the title indicates, this volume focused on the affective realm of attitudes, feelings, and emotions. Five categories of behavior are listed, moving from simplest to most complex. Table 2.3 below presents these categories in a clear yet comprehensive format.

Table 2.3: Bloom's Taxonomy: Affective Domain

(adapted from Clark 2010a)

Categories of Affective Behavior (Simple to Complex)	Examples and Key Words (Verbs)
Receiving: Awareness, willingness to hear, selected attention.	Examples: Listening to others with respect. Listening for and remembering the name of newly introduced people. Key Words: asks, chooses, describes, follows, gives, holds, identifies, locates, names, points to, selects, sits, erects, replies, uses.
Responding: Active participation on the part of the learners. Attending and reacting to a particular phenomenon. Learning outcomes may emphasize compliance in responding, willingness to respond, or satisfaction in responding (motivation).	Examples: Participating in class discussions. Giving a presentation. Questioning new ideals, concepts, models, etc. in order to understand them fully. Knowing and practicing the safety rules. Key Words: answers, assists, aids, complies, conforms, discusses, greets, helps, labels, performs, practices, presents, reads, recites, reports, selects, tells, writes.
Valuing: The worth or value a person attaches to a particular object, phenomenon, or behavior. This ranges from simple acceptance to the more complex state of commitment. Valuing is based on the internalization of a set of specified values, while clues to these values are expressed in the learner's overt behavior and are often identifiable.	Examples: Demonstrating belief in the democratic process. Sensitivity towards individual and cultural differences (value diversity). Showing the ability to solve problems. Proposing a plan to social improvement and follows through with commitment. Informing management on matters that one feels strongly about. Key Words: completes, demonstrates, differentiates, explains, follows, forms, initiates, invites, joins, justifies, proposes, reads, reports, selects, shares, studies, works.
Organizing: Organizing values into priorities by contrasting different values, resolving conflicts between them, and creating a unique value system. The emphasis is on comparing, relating, and synthesizing values.	Examples: Recognizing the need for balance between freedom and responsible behavior. Accepting responsibility for one's behavior. Explaining the role of systematic planning in solving problems. Accepting professional ethical standards. Creating a life plan in harmony with abilities, interests, and beliefs. Prioritizing time effectively to meet the needs of the organization, family, and self. Key Words: adheres, alters, arranges, combines, compares, completes, defends, explains, formulates, generalizes, identifies, integrates, modifies, orders, organizes, prepares, relates, synthesizes.
Characterizing: Has a value system that controls behavior. The behavior is pervasive, consistent, predictable, and most importantly, characteristic of the learner. Instructional objectives are concerned with the student's general patterns of adjustment (personal, social, emotional).	Examples: Shows self-reliance when working independently. Cooperates in group activities (displays teamwork). Uses an objective approach in problem solving. Displays a professional commitment to ethical practice on a daily basis. Revises judgments and changes behavior in light of new evidence. Values people for what they are, not how they look. Key Words: acts, discriminates, displays, influences, listens, modifies, performs, practices, proposes, qualifies, questions, revises, serves, solves, verifies.

Though Bloom and his team never released a publication describing the psychomotor domain, versions were eventually published by Simpson (1972), Harrow (1972), and Dave (1975). Since the psychomotor domain is not significant for this project, this aspect of the taxonomy is not examined.

Bloom's taxonomy was originally developed to enhance cooperation in the design of university achievement tests. However, the taxonomy soon found usefulness as a standard against which objectives could be evaluated. Course objectives could be analyzed to ascertain if they were sufficiently balanced across the various categories listed in the taxonomy. In particular, the taxonomy proved especially helpful for teachers and course designers in the planning of lessons, exercises, and assessments (Krathwohl and Anderson 2003).

Bloom's taxonomy is not without critics. Highlighting the major complaint, Sugrue (2002) questioned the taxonomy's validity and reliability, noting that Bloom's categories or 'levels' (knowledge, comprehension, application, analysis, synthesis, and evaluation) lack support in research on learning. Sugrue (2002) asserted that the only research-backed distinction is that between declarative (conceptual) knowledge, which enables recall and understanding, and procedural knowledge, which enables performance of tasks.

2.2.2.4 Sweller's Cognitive Load Theory

Developed primarily by John Sweller, cognitive load theory (CLT) originated in the 1980s and experienced significant development and expansion in the 1990s. According to Paas, Renkl, and Sweller (2003:1), CLT provides a "framework for investigations into cognitive processes and instructional design". When the structure of information is considered alongside the cognitive architecture associated with the processing of information, new ideas about instructional designs and procedures emerge.

The foundational tenet of cognitive load theory is that the quality of instructional design increases when careful consideration is given to the role and limitations of working memory. According to Chandler and Sweller (1991:293), "Cognitive load theory is concerned with the manner in which cognitive resources are focused

and used during learning and problem solving”. Instructional formats too often utilize learning and problem-solving procedures that force learners to engage in cognitive activities that are not aligned with the goals of the learning task. As Chandler and Sweller (1991:293) noted, these irrelevant activities increase ‘cognitive load’ and can impede learning and skill acquisition. Cognitive load theory seeks to optimize the intellectual performance of learners by providing guidelines concerning the manner in which information is presented in learning activities (Sweller, Van Merriënboer, and Paas 1998:251).

The concept of *cognitive load* is central to this theory and merits further explanation. According to Cooper (1990:108), cognitive load entails the level of ‘mental energy’ a learner must expend in order to process a specific amount of information. As one might expect, an increase in the amount of information to be processed increases the associated cognitive load. Cognitive load theory proposes that “effective instructional material promotes learning by directing cognitive resources towards activities that are relevant to learning rather than to processes that are an adjunct to learning” (Cooper 1990:108).

Sweller, van Merriënboer, and Paas (1998:258-267) identified three types of cognitive load — intrinsic, extraneous, and germane.

Intrinsic cognitive load relates to the complexity or difficulty of the content that is to be learned. The cognitive load is considered intrinsic because it is derived from element interactivity intrinsic to the material being learned. An ‘element’ is the amount of information that can be processed in working memory by a learner as a single unit (Pollock, Chandler, and Sweller 2002:62). Materials differ in levels of element interactivity and this cannot be altered by instructional manipulation (Paas, Renkl, and Sweller 2003:1). The designer who seeks to facilitate true understanding must give careful consideration to cognitive load, since the intrinsic characteristics of certain types of information already impose a heavy working memory load regardless of instructional design considerations (Pollock et al. 2002:62).

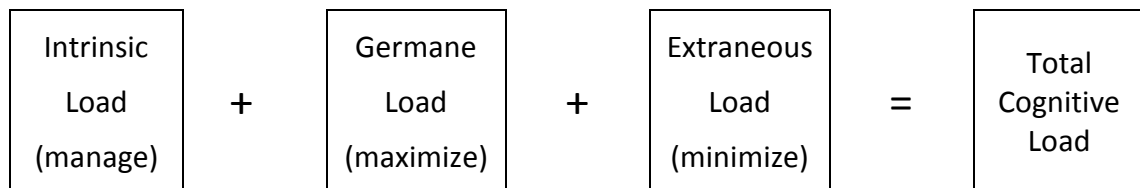
The way in which content is presented can also impose a cognitive load on the learner. When unnecessary load interferes with learning, it is referred to as an

extraneous cognitive load (Paas et al. 2003:2). Extraneous cognitive load is “generated by the manner in which information is presented to learners...; instruction should be structured to reduce unnecessary extraneous working memory load” (Pollock et al. 2002:62).

For the designer, *germane cognitive load* is the most important. Germane load refers to demands placed upon the learner’s working memory by mental activities that result in the construction of schema and contribute directly to learning (Sweller et al. 1995:264). Germane load is considered desirable. The way in which information is presented and the nature of required learning activities directly affect the germane cognitive load (Paas et al. 2003:2).

“Working memory load is affected by the inherent nature of the material (intrinsic CL) and by the manner in which the material is presented (extraneous and germane CL)” (Kirschner 2002:4). The greater the germane load, the lower the extraneous load, and the better managed the intrinsic load, the greater the potential for learning.

Figure 2.4 Understanding Cognitive Load



According to De Jong (2010:125), cognitive load theory makes the following recommendations.

- (1) “Present material that aligns with the prior knowledge of the learner (intrinsic load).”
- (2) “Avoid non-essential and confusing information (extraneous load).”
- (3) “Stimulate processes that lead to conceptually rich and deep knowledge (germane load).”

In recent times, cognitive load theory has come under increasing scrutiny. Schnotz and Kurschner (2007:470) noted that a number of empirical studies have demonstrated the importance of designing instruction according to principles of cognitive load theory, but show concern over numerous conceptual problems with

the theory that make empirical findings difficult, especially in the application of memory to learning and the nature of the relationship among the three types of cognitive load. In the same manner, De Jong (2010:105-134) expressed concern about the “conceptual clarity, methodological rigor, and external generalizability” of work done to support the theory. He also expressed concern that Sweller and his colleagues essentially ignored earlier findings by Gagné, Briggs, and Wager (1992), Dick and Carey (1990), and Reigeluth (1983). Moreno (2006:170-181) also voiced concern about the reliability of empirical research on cognitive load theory, highlighting a number of studies with contradictory findings.

2.3 Overview of Major Theories and Models

Over the past four decades, a variety of sets of systematic instructional design procedures (or models) have been developed, and have been referred to by such terms as the systems approach, instructional systems design (ISD), instructional development, and instructional design.... Although the specific combination of procedures often varies from one instructional design model to the next, most of the models include the analysis of instructional problems, and the design, development, implementation and evaluation of instructional procedures and materials intended to solve those problems (Reiser 2001:58).

This section examines a number of systems-based instructional design models, ranging from early linear, conditions-based models to more recently developed constructivist models. These models can be applied to various types of projects. Excluded from this list are design models that focus on computer-based or online learning and models that are considered too complex for church-based application. Included in this review are the following theories and/or models.

- Gagné ‘s conditions of learning and events of instruction
- The Dick and Carey systems approach model
- The Smith and Ragan instructional design model
- The Morrison, Ross, and Kemp model (the MRK model)
- ADDIE (the instructional systems design model)

- The backward design model of Wiggins and McTighe
- Willis' R2D2 constructivist model
- Vella's design steps for dialogue education

2.3.1 Gagné's Conditions of Learning and Nine Events of Instruction

An instructional psychologist, academic, consultant, and author of multi-edition works such as *Conditions of Learning* (1965, 1970, 1977, 1985, 1995) and *Principles of Instructional Design* (1974, 1979, 1988, 1992, 2004), Robert Gagné had a profound influence on American education and training in the second half of the twentieth century. True pioneers in their field, Gagné and his colleagues were among the first to develop a systems approach to instructional design.

Convinced of the need to go beyond the traditional learning theory of his day, Gagné worked toward the development of an instructional theory that could address the unique factors relating to the acquisition of complex skills. Known as the *conditions of learning* (Gagné 1977, 1985), Gagné's theory suggests that there are five categories of learning (Gagné et al. 1992:43-48), each requiring different approaches to instruction. For learning to take place in each of these categories, certain external conditions are essential to activate the internal processes of learning. To assist in the design of effective instruction, Gagné developed one of the earliest systematic approaches to learning design, his *nine events of instruction* (Gagné 1985, Gagné et al. 1992:185-203). Gagné's theory is examined in detail below.

2.3.1.1 Conditions of Learning

Recognizing that not all learning is the same, Gagné proposed five distinct categories or domains of learning, each requiring a unique approach to instruction (Gagné et al. 2005:11).

- (1) Motor skills — movements of skeletal muscles organized to accomplish purposeful actions
- (2) Verbal information (declarative knowledge) — facts and organized “knowledge of the world” stored in the learner's memory

- (3) Intellectual skills (procedural knowledge) — permitting the learner to carry out symbolically controlled procedures
- (4) Cognitive strategies — the means by which learners exercise control over their own learning processes
- (5) Attitudes — the internal states that influence the personal action choices a learner makes

Smith and Ragan (2000:155) noted that in the fourth edition of *Conditions of Learning* (1985), Gagné identified four categories within the domain of intellectual skills: discriminations, concepts, rules, and higher-order rules (domain-specific problem solving), proposing that “these knowledge types are in a prerequisite, vertical transfer relationship, with discriminations prerequisite to concepts, concepts prerequisite to rules, and rules prerequisite to problem solving”. Significantly, Gagné recognized that most learning in each of these categories or domains tends to be hierarchical, building on previous learning, and that the design of effective instruction has to take cognizance of prerequisite learning.

Molenda (2002) noted that in the early editions of his influential book, *Conditions of Learning* Gagné (1965, 1977) proposed that an information-processing model of learning could be combined with behaviorist concepts to produce a more comprehensive view of learning tasks. From this Gagné deduced prescriptive theories about instruction methods, which he termed ‘external conditions of learning’. These external conditions were considered fundamental to the development of a framework of instruction supporting the inner cognitive processes involved in learning. This led to the development of Gagné’s theory on *conditions of learning* — environmental events (external conditions) and stages of information processing (internal conditions) required for effective learning in each of these domains. For Gagné and his colleagues, instruction is conceived “as a deliberately arranged set of external events designed to support internal learning processes” (Gagné, Briggs, and Wager 1992:11).

2.3.1.2 The Nine Events of Instruction

As Gagné’s perspectives on learning domains and conditions of learning matured, he developed a corresponding model of instructional design called the

events of instruction, first mentioned in the 1965 edition of *Conditions of Learning*. Gagné described this instructional model as an “attempt to relate the external Events of Instruction to the outcomes of learning by showing how these events lead to appropriate support or enhancement of internal learning processes” (Gagné 1985:244). In this model, Gagné views instruction as a set of events external to the learner that are intentionally designed to support internal learning processes (Gagné et al. 1992:189). The nine events of instruction are designed to enable learners to move forward from “where they are” toward achievement of the defined target objective (Gagné et al. 1992:189).

According to Gagné, “The province of an instructional theory is to propose a rationally based relationship between instructional events, their effects on learning processes, and the learning outcomes that are produced as a result of these processes” (Gagné 1985:244). Instruction provides support to the learning processes taking place within the learner. As such, the characteristics of instructional events must be derived from what is known about learning processes (Gagné et al. 1992:186-187).

Gagné’s nine events of instruction are as follows (Gagné et al. 1992:15-16, 20-35, 192-198).

- (1) Gain attention. “The purpose of this event is to focus learners on the tasks to be learned” (Okey 1991:199). As new material is introduced, an interest-creating device or tool such as a story, drama, video clip, or shocking statistic is used to capture the attention of the learner.
- (2) Inform learners of objectives. Describing the goal of a lesson, what learners will be able to accomplish, and how they will be able to use the knowledge, this event gives learners the opportunity to “organize their thoughts around what they are about to see, hear, and/or do” (Clark 2010b).
- (3) Stimulate recall of prior learning. For this event to be effective, the designer must ensure that the learner has the prerequisite knowledge necessary. Once this is established, the relevant knowledge must be

recalled into active memory to combine it with new information (Okey 1991:200).

- (4) Present the content. “The focus of presenting stimulus materials is to place before the learners a context or background and the facts, knowledge, or skill to be learned” (Okey 1991:200). *Chunking* (grouping information in digestible ‘chunks’ to reduce the information overload) is helpful; and it is essential to focus the learner on the most relevant aspects of the instruction.
- (5) Provide learning guidance. Closely connected to the previous step, the provision of learning guidance models the actions that constitute correct performance (Okey 1991:200). “This is not the presentation of content, but... instructions on how to learn” (Clark 2010b).
- (6) Elicit performance (practice). The learner performs an overt action to demonstrate that the internal capability is being acquired. The response must align with the objective to ensure that what the learner is practicing is relevant to the learning outcome (Aronson and Briggs 1983:92).
- (7) Provide feedback about performance correctness. Feedback, which should focus on being helpful and informative, enables learners to determine the correctness and accuracy of their performance (Okey 1991:201-202).
- (8) Assess performance. Determine if the learner achieved and can consistently perform the learning objective (Aronson and Briggs 1983:92).
- (9) Enhance retention and transfer. Repetition and application in various contexts and the use of a variety of appropriately spaced problem solving experiences enhance retention and transfer of learning (Gagné et al. 1992:8-11).

Applying this to the systematic design of instruction, Gagné et al. (1992:14) commented,

The design of instruction must be undertaken with suitable attention to the conditions under which learning occurs — conditions which are both external and internal to the learner. These conditions are in turn dependent upon what is being learned.

Gagné et al. (1992:14) stated that the systematic design of instruction requires the designer to establish first a rationale for what is to be learned by ascertaining the situation that created the need. Once the goals are identified, a system of instruction may be constructed. Attention must be given to the use of appropriate information, data, and theoretical principles at each planning stage, and to consistency and compatibility at each point of decision. Prospective outcomes at each stage must be checked against the goals set by system designers/managers. Gagné et al. (1992:14) noted that it is within this type of systems framework that conditions of human learning are applied to instructional design.

2.3.1.3 Gagné's Influence

Gagné's influence in the field has been enduring. Smith and Ragan (2000:161) noted that subsequent generations of instructional design theories find their roots in his conditions of learning. 'Conditions-based' models, several of which are reviewed in this project, assume that learning can be classified into categories based on the cognitive processes required for learning (the 'internal conditions of learning') and that similar instructional supports are needed to facilitate learning in these categories (the 'external conditions of learning').

Gagné's theories have also influenced other areas of education including curriculum design (Ertmer, Driscoll and Wager in Zimmerman and Schunk 2003:324).

Beginning with Gagné's early work on transfer of training issues, continuing with his advancement of cumulative theory of learning and instruction, and culminating in the foundation of the discipline of instructional design, Gagné's work has helped to shape educators' understanding of the entire learning enterprise: the nature of the

learner, conditions of learning, and different types of learning outcomes. Evidence of his influence can be found in the application of his theories and research to a wide variety of content areas, age levels, and learning environments (Ertmer et al. 2003:308).

Table 2.4: Gagné's Events of Instruction

(adapted from Gagné, Briggs, and Wager 1992:185-198)

Gagné 's Nine Events of Instruction	
Instructional Event	Internal Mental Process
(1) Gain attention.	Stimuli activate receptors
(2) Inform learners of objectives.	Create a level of expectation for learning
(3) Stimulate recall of prior learning.	Retrieval and activation of short-term memory
(4) Present the content.	Selective perception of content
(5) Provide learning guidance.	Semantic encoding for storage in long-term memory
(6) Elicit performance (practice).	Responds to questions to enhance encoding and verification
(7) Provide feedback.	Reinforcement and assessment of correct performance
(8) Assess performance.	Retrieval and reinforcement of content as final evaluation (metacognition)
(9) Enhance retention and transfer .	Retrieval and generalization of learned skill to new situation (generalization)

Smith and Ragan (2000:153) highlighted four major propositions that constitute the essence of Gagné's contribution to instructional theory.

- Learning goals can be categorized as to learning outcome or knowledge type (types of learning).
- Learning outcomes can be represented in a predictable prerequisite relationship (learning hierarchies).

- Acquisition of different outcome categories requires different internal processes (internal conditions of learning).
- Acquisition of different outcome categories requires identifiably different instructional processes (events of instruction and external conditions of learning).

It was these outstanding contributions that made Gagné “a leading interpreter of learning theory into instructional theory” (Molenda 2002).

2.3.1.4 Keller’s ARCS Model and the Nine Events of Instruction

Not surprisingly, Keller’s (1983) prescriptive ARCS model for motivational design of instruction relates neatly to Gagné’s nine events of instruction. Keller’s prescriptions include four types of motivational requirements.

- Attention — arouse and sustain
- Relevance — instruction linked to important needs
- Confidence — feelings of competence
- Satisfaction — reinforcement

‘Attention’ in the ARCS models corresponds directly to Gagné’s first event: gaining attention. ‘Relevance’ is created when, in Gagné’s system, the learner is informed of the objective(s) and stimulated to recall prior learning. Confidence develops with the provision of learning guidance. Satisfaction is enhanced through positive feedback and successful assessment (Reigeluth and Curtis 1987:198).

2.3.2 The Dick and Carey Systems Approach Model

A former colleague of Gagné, Walter Dick, together with Lou Carey, developed the well known Dick and Carey *systems approach model* for designing instruction. Originally published in *The Systematic Design of Instruction* (1978) and updated continually through six subsequent releases (the last two with James Carey), the Dick and Carey model is viewed as “the standard to which all other ID models (and alternative approaches to design and development of instruction) are compared” (Gustafson and Branch 2002:59). According to

Gustafson and Branch (2002:62), the Dick and Carey model is used extensively in business, industry, government, and military training settings.

An iterative process applicable to a wide range of contexts, this systems approach model is often used to design courses and curricula. Originally developed for programmed instruction, and built on behavioral foundations, the model has become increasingly learner-centered with each incarnation.

Dick and Carey (1990:3) view instruction as “a systematic process in which every component (teacher(s), students, materials, and learning environment) is crucial to successful learning” and an instructional system as “a set of interrelated parts, all of which work together toward a defined goal”. In such a system, parts are interconnected and depend on each other for input and output. Feedback is used throughout the system to determine if the desired goal has been reached (Dick and Carey 1990:3).

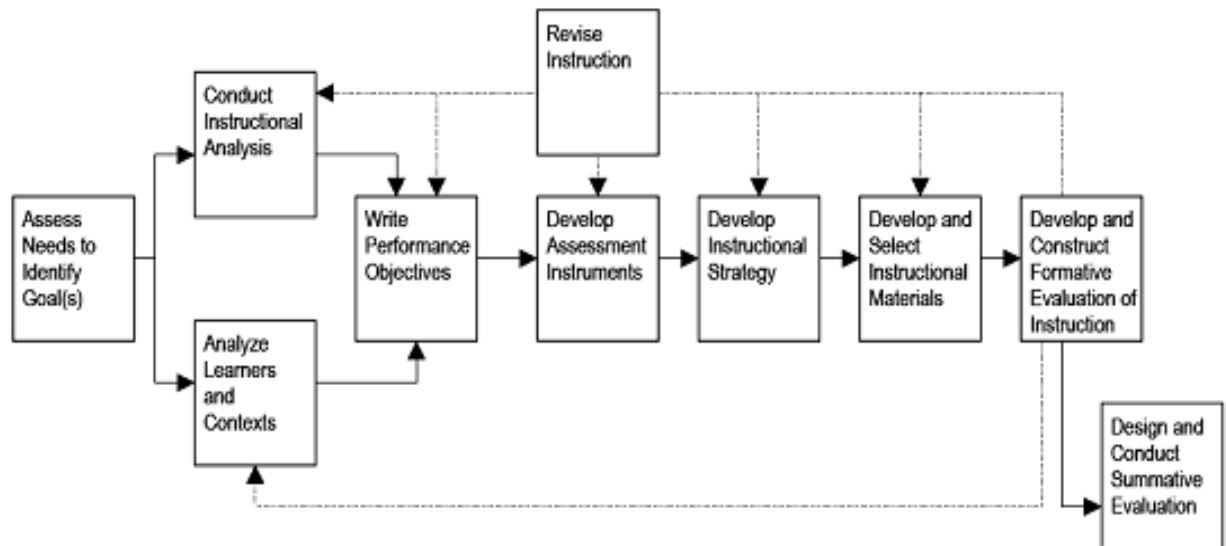
The Dick and Carey model keeps designers focused on the goal of the instruction by requiring a needs assessment and the documentation of clear, measurable learning objectives (Gustafson and Branch 2002: 61). Since the development of instruction entails a systematic process, the role of each component is carefully considered, with formative and summative evaluation identifying needed improvements to ensure that the instructional goal is met.

2.3.2.1 Components of the Dick, Carey, and Carey Systems Approach Model

As evident in Figure 2.9, the Dick and Carey model features ten interconnected boxes. “The boxes represent sets of theories, procedures, and techniques employed by the instructional designer to design, develop, evaluate, and revise instruction” (Dick, Carey, and Carey 2005:5). Each of the boxes represents a stage or component in the model. The tenth box deals with summative evaluation, which is not normally part of the actual instructional design process.

Figure 2.5: The Dick and Carey Model for Designing Instruction

(adapted Dick, Carey, and Carey 2005:1)



Dick et al. (2005:6-7) described the components of their model as follows.

- (1) *Identify instructional goals.* The first step in this model is to determine what learners should be able to do when they have completed the instruction. Instructional goal(s) may be derived from a list of goals, a performance analysis, a needs assessment, practical experience, the analysis of people on the job, or other requirements for new instruction.
- (2) *Conduct instructional analysis.* Once the designer determines an instructional goal, the type(s) of learning and steps required to achieve the goal are identified. A step-by-step determination is made of what people do when they perform the goal. The final step in this process is to determine what skills, knowledge, and attitudes (entry behaviors) are required of learners to begin instruction. A diagram is then compiled indicating the relationships among all of the skills that have been identified. Most research suggests that it is the analysis process, and not the delivery mode, that determines the success of the instruction (Dick and Carey 1990:9).

- (3) *Analyze learners and contexts.* In addition to analyzing instruction, the designer must also consider the learners, learning context, and context of application. “Learners’ current skills, preferences, and attitudes are determined along with the characteristics of the instructional setting and the setting in which the skills will eventually be used” (Dick et al. 2005:6). Information gathered in this stage is critical to succeeding steps in the model.
- (4) *Write performance objectives.* Informed by the instructional analysis and statement of entry behaviors, a description of what learners will be able to do at the end of the instruction process is written. This statement is derived from the skills identified in the instructional analysis and lists “the skills to be learned, the conditions under which the skills must be performed, and the criteria for successful performance” (Dick et al. 2005:7).
- (5) *Develop assessment instruments.* This model recommends specifying assessment instruments prior to designing the instruction. “If the developers can be clear enough about what and how they will be testing, they will have a much better idea of what instructional strategies to select in the next step” (Molenda and Russell 2006:343). Based on the written objectives, assessments are composed which measure the learners’ ability to perform the specific objectives. It is important to relate the kind of behavior described in the objectives to the level of performance required in the assessment.
- (6) *Develop instructional strategy.* With information from the preceding steps, the instructional strategy is developed. According to Dick et al. (2002:7), the strategy should include sections on “pre-instructional activities, presentation of information, practice and feedback, testing, and follow-through activities”. The strategy should be based on learning research, the content and media that will be used, and the characteristics of the learners.
- (7) *Develop and select instructional materials.* At this stage, the instructional strategy is used to guide the development of the instruction, including preparation of instructional materials in a variety of formats, tests, and a guide for instructors. The decision on whether or not to develop materials

depends upon both the availability of existing relevant materials and the resources that are available to support development activities (Dick 2002:7-8).

- (8) *Design and conduct the formative evaluation of instruction.* Once a draft of the instruction is completed, evaluations are conducted to collect data to improve the instruction. Three types of formative evaluation — one-to-one evaluation, small-group evaluation, and field evaluation — provide the designer with information that can be used to improve the instruction (Dick et al. 2002:8).
- (9) *Revise instruction.* Revising instruction is the final step in the design process (but the first step in a repeat cycle). Information gleaned from the formative evaluation is summarized and interpreted in order to identify difficulties experienced by learners in achieving the objectives. This, in turn, is linked to specific deficiencies in the instruction. Findings from the formative evaluation are not only used to revise the instruction but also to validate the instructional analysis and the assumptions about the entry behaviors and characteristics of learners. Statements of performance objectives and test items are also reexamined in light of collected data. The instructional strategy is also reviewed. “All this is incorporated into revisions of the instruction to make it a more effective instructional tool” (Dick et al. 2002:8).
- (10) *Design and conduct summative evaluation.* Summative evaluation “is the culminating evaluation of the effectiveness of instruction” and “generally is not a part of the design process” (Dick and Carey 1990:6). Occurring after the instruction has been formatively evaluated and revised, summative evaluation examines the absolute and/or relative value of the instruction. Generally, summative evaluation is conducted by an independent evaluator, so this component is not considered an integral part of the instructional design process.

2.3.2.2 Criticisms and Limitations of the Dick and Carey Model

Dick (1996:58-59) addressed some of the limitations and criticisms of the Dick and Carey model. Responding to criticism that their model is not a complete ISD

model due to its limited procedures for total performance system analysis and lack of procedures for implementing and maintaining instruction, Dick reminded critics that their intent was to help novices in the field. Research by Wedman and Tessmer (1993) indicated that many designers do not follow the step-by-step process but use some steps and ignore others. Again, Dick reminded critics that the target audience is inexperienced designers who need guidance in the various stages involved in systematic design. Willis (1995:5-23), a constructivist and creator of the R2D2 model, criticized the Dick and Carey model as fixed, linear, and inherently behaviorist. Dick (1996:62-63) responded that their model

currently incorporates concepts and procedures that are important to the constructivists, including recognition of the importance of learner motivation and prior experience ... and the importance of context for both learning and performance. Although these points are consistent with constructivist philosophy, they are also consistent with objectivist research findings as well as with the performance technology methodology that is being adopted by more and more designers in business and industry.

In spite of criticism, the Dick and Carey model remains among the best known and most utilized systems approaches to instructional design, still taught as a standard introductory course in universities and applied regularly in instructional interventions in business, industry, and government (Molenda and Russell 2006:343).

2.3.3 The Smith and Ragan Model of Instructional Design

Patricia Smith and Tillman Ragan (1999, 2005) endeavored to elaborate Gagné's conditions-based model of instructional design, focusing especially on the cognitive processes necessary for the acquisition of different learning capabilities (Smith and Ragan 2004:635-636). As mentioned previously, Smith and Ragan (1999:5) asserted that, at a minimum, the designer's task is to answer three questions.

- Where are we going? (What are the objectives of the instruction?)
- How will we get there? (What is the instructional strategy? What is the instructional medium?)
- How will we know when we have arrived? (What should our assessments be like? How will we evaluate and revise the instructional materials?)

These questions translate into the three main phases of the Smith and Ragan model.

- Analysis of the learning environment, learners, and learning task(s)
- Determination of instructional strategies — organizational, delivery, and management
- Development and implementation of evaluation

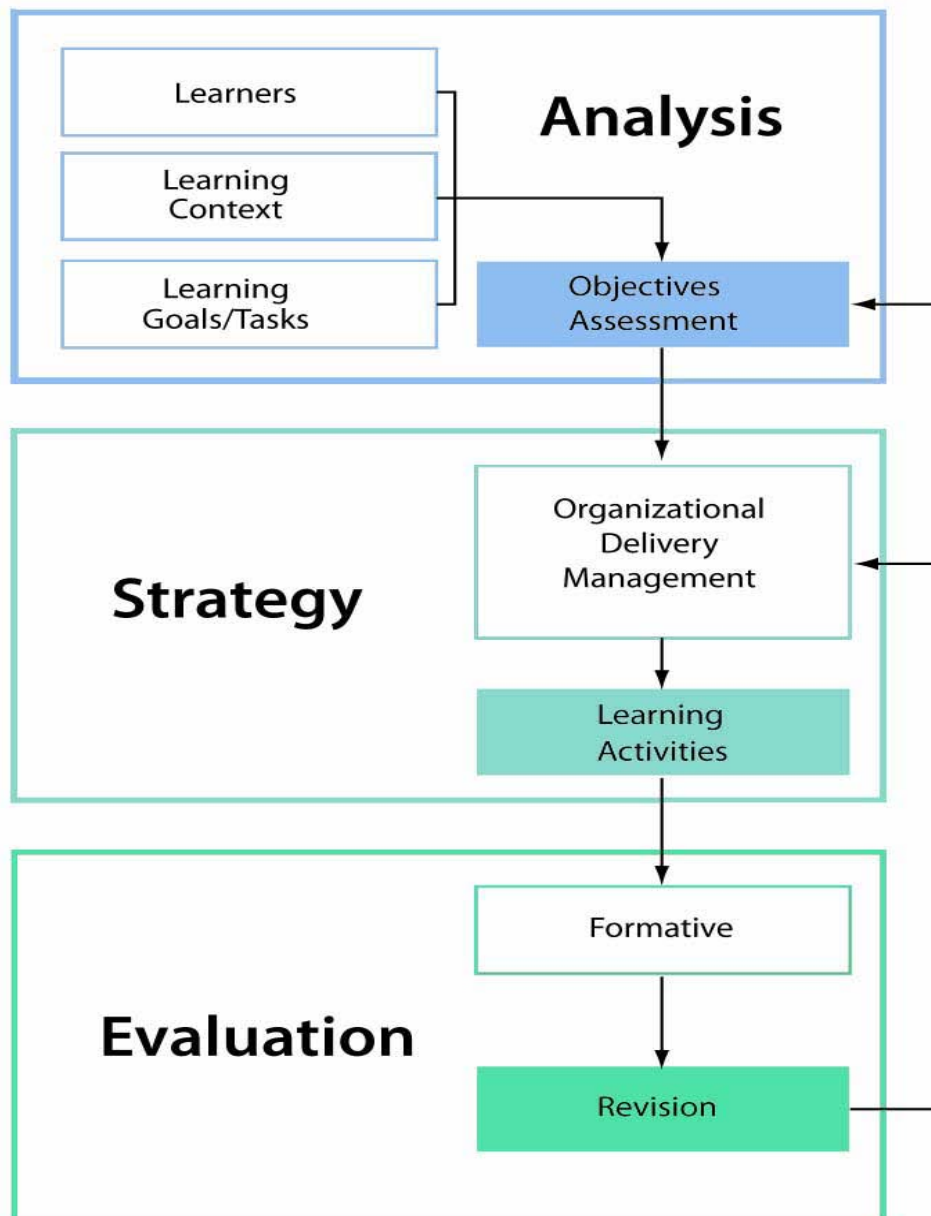
2.3.3.1 The Analysis Phase

Often referred to as a needs assessment, the analysis phase focuses on gaining relevant information on the learning environment, the learners themselves, and the tasks for which the learners must be prepared. A primary objective of this analysis is to ascertain the difference between what learners are able to do and what they need to be able to do in order to determine whether or not new instruction really needs to be designed.

“The analysis of the learning context involves two steps: (1) the substantiation of a need for instruction in a certain content area, and (2) a description of the learning environment in which the instructional product will be used” (Smith and Ragan 1999:27). Analysis of the learning environment would include teachers/trainers, existing curricula, available equipment, facilities, and, of course, the institution and broader community in which the learning will occur.

Figure 2.6: The Smith and Ragan Model

(Smith and Ragan 1999:8)



In addition to examining the learning context, careful attention must be paid to the learners. Smith and Ragan (1999:43) emphasized that understanding the target audience is essential, “as this knowledge will be important in designing instruction that is effective and interesting to the learners”. The emphasis on learner analysis is not on what learners need to know or be like, but what they *are* like and *do* know (Smith and Ragan 1999:43). Consideration should be given to

cognitive, affective, social, and physiological characteristics. Perhaps most important, the designer must assess specific prior learning.

The third part of this phase is analysis of the learning task. Identified gaps in learning must be turned into useful information that can guide design. Learning task analysis entails writing an instructional goal, determining the types of learning, conducting an information processing analysis, conducting a prerequisite analysis, and writing performance objectives for the instructional goal and the prerequisites. Composed at the beginning of the learning task analysis, an instructional goal is what a learner should be able to do at the end of the instruction (Smith and Ragan 1999: 63).

In the model of Smith and Ragan, assessment of learner performance is considered in the analysis phase, ensuring that “the conditions and behavior specified in the objectives are considered in the writing of each assessment item” (Smith and Ragan 1999:102). Smith and Ragan emphasize the importance of valid, reliable, and practical assessments. Assessments of learner performance can be based on observation, simulations, or written exams.

2.3.3.2 The Instructional Strategy Phase

Reigeluth (1983) identified three aspects to instructional strategies — organizational strategy characteristics, delivery strategy characteristics, and management strategy characteristics.

Organizational strategy characteristics refer to how instruction will be sequenced, what particular content will be presented, and how this content will be presented. Delivery strategy characteristics deal with what instructional medium will be used and how learners will be grouped. Management strategy characteristics include the scheduling and allocation of resources to implement the instruction that is organized and delivered as planned within the previous two strategy aspects. These strategies can be planned at the course or unit (macro) level or at the lesson (micro) level (Smith and Ragan 1999:138).

Organizational strategies can apply at both macro and micro levels. Macro-strategies consider the scope and sequence structures of lengthy courses, whereas micro-strategies apply the expanded instructional events developed by Smith and Ragan (1999:140) to single lessons or short courses. This expanded list of instructional events is listed below.

Introduction

- Activate attention to the lesson (gain attention to the lesson).
- Establish purpose (inform learner of instructional purpose).
- Arouse interest and motivation (stimulate learner's attention).
- Preview the lesson (provide overview).

Body

- Recall relevant prior knowledge (stimulate recall of prior knowledge).
- Process information and examples (present information and examples).
- Focus attention (gain and focus attention).
- Employ learning strategies (guide or suggest use of learning strategies).
- Practice (elicit response).
- Evaluate feedback (provide feedback) .

Conclusion

- Summarize and review (provide summary and review).
- Transfer learning (enhance transfer).
- Remotivate and close (provide remotivation and closure).

Assessment

- Assess performance (conduct assessment).
- Evaluate feedback; seek remediation (provide feedback and remediation).

Macro-strategies often fit in to one of five curriculum-based patterns (Posner and Rudnitsky 1978).

A 'world-related structure' clusters and sequences content according to the way things in the world seem to be organized — by

time, by space, and by physical characteristics.... An 'inquiry-related sequence and organization' teaches ideas together because they represent similar phases of inquiry. Following this scheme, a designer would sequence and organize instruction by the steps of inquiry that the scientists in that field pursue.... A 'utilization-related organization' groups ideas together according to how skills will be used in the future, either personally, socially, or vocationally. Following this orientation, groups of concepts, facts, procedures, or theories are grouped together and taught in priority sequence so that the first to be taught are those topics that will be used first, the next topics taught are the next used, and so forth.... 'Learning-related structures' organize information in such a way that new learning builds on relevant prior knowledge.... 'Concept-related structures' use the structure of the discipline to organize the content. The most super-ordinate, all-inclusive concepts or principles are taught first, and then the more specific cases of the concepts or applications of the principles are taught later (Smith and Ragan 1999: 156-157).

In their discussion on instructional strategies, Smith and Ragan (1999:151) asked an important question: "Which should be the locus of control of information processing, the instruction or the learners?" For designers, the challenge is finding the correct balance between generative and supplantive strategies.

Supporting a constructivist view, generative strategies enable learners to encounter the content in such a way that they ... construct their own idiosyncratic meanings ... by generating their own educational goals, organization, elaborations, sequencing and emphasis of content, monitoring of understanding, and transfer to other contexts (Smith and Ragan 1999:151-152).

In this approach, learners exercise 'control' of information processing through autonomous control of the events of instruction. They are 'active learners', generating associations between new information and prior learning. "The more the learner is required to relate information to his own cognitive structure, the

greater the depth of processing” (Smith and Ragan 1999:152). However, generative instructional strategies can result in cognitive overload and emotional frustration, increasing time required to process information.

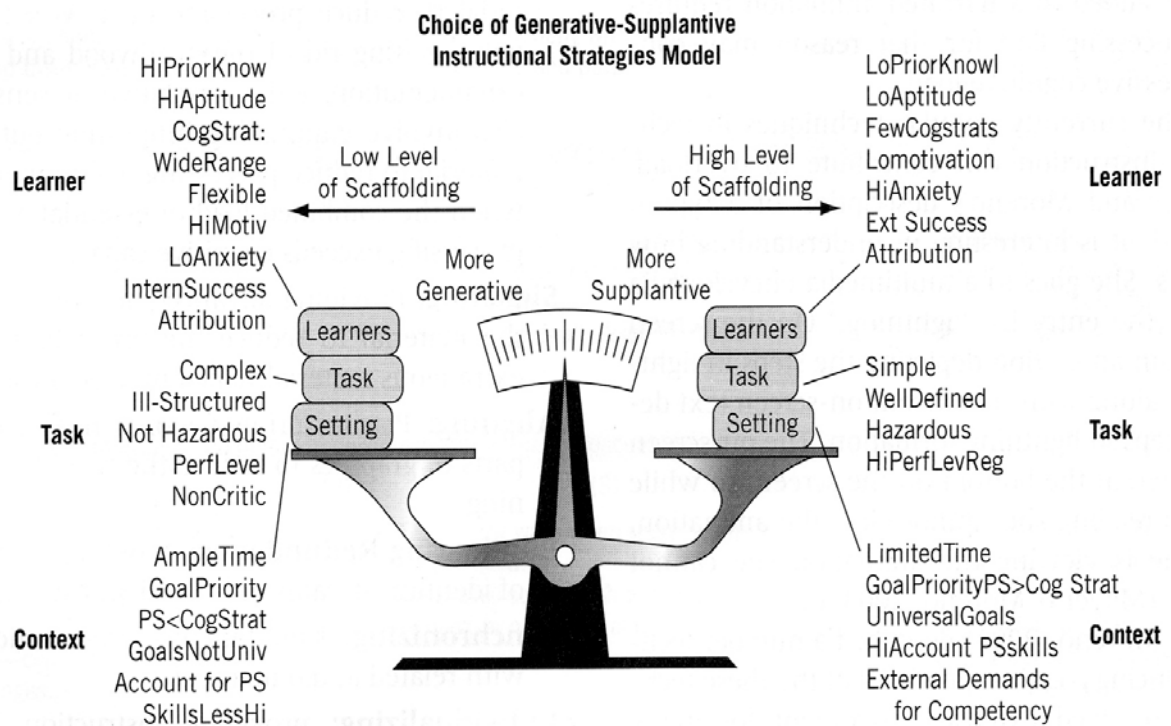
Smith and Ragan (1999:152-153) noted that instructional designers traditionally lean toward supplantive strategies in their instruction, limiting learner responsibility for structuring the learning situation and conserving learners’ cognitive capacity for acquiring skills and knowledge related to the learning task. Though supplantive strategies often seem to result in more focused learning and greater predictability in outcomes, they can be less engaging, possibly limiting the depth of processing, construction of personal meaning, and amount of authentic learning.

As Smith and Ragan (1999:153) noted, the choice between generative and supplantive strategies in design is not always easy. Designers must balance two competing demands: “the need to require sufficient mental effort to lead toward learning” and “the need to support the learners’ processing sufficiently in a way that does not overload their working memory” (Smith and Ragan 1999:153). Smith and Ragan designed the COGGS model (see Figure 2.11) to assist in this aspect of the design process.

Decisions on delivery strategy involve choosing appropriate media of instruction and grouping strategies. The same selections may be used through all the events, or they may vary (Smith and Ragan 1999:344). Decisions concerning the use of media are influenced by the learning task and learning conditions, the characteristics of the learners, the learning context, and the nature of the media. Grouping strategies are influenced by the learning task, learner characteristics, the context, and the type of media being used. Instructional management strategies inform the organizational and delivery strategies, including the scheduling of instructional events and the means by which events are delivered (Smith and Ragan 1999:355). The final step of the instructional strategy phase is the design and production of instructional materials. Instructional materials can include printed matter, audio-visual material, video productions, computer-based programming, and instructor’s guides.

Figure 2.7: The Smith and Ragan COGGS Model

(Smith and Ragan 2005:143)



2.3.3.3 The Evaluation Phase

The evaluation phase of the Smith and Ragan model includes both formative and summative evaluation. Formative evaluation takes place at the conclusion of each stage of design in order to make important revisions before materials are developed. Smith and Ragan (1999:388-407) suggested that learning goals, analyses (of learners, environment, and tasks), and assessment plans all be reviewed. Once drafts of instructional materials are complete, expert reviews are very helpful to ensure accuracy, completeness, and appropriateness. Following reviews by experts, learner validation needs to take place — first on a one-to-one basis, then with a small group. Field trials are conducted to evaluate revisions, ascertain problems that might arise in a real instructional environment, and validate the instruction through a large enough sample to ensure effectiveness (Smith and Ragan 1999:402).

In instructional design, summative evaluation is used to collect, analyze, and summarize data to enable decision-makers to ascertain the effectiveness, appeal

and efficiency of the instruction (Smith and Ragan 1999:408). Summative evaluation can be either objective, relying on empirical data and observation, or subjective, employing expert opinion.

2.3.4 The Morrison, Ross, and Kemp Model

Created by Jerrold Kemp in 1985, the Kemp instructional design model is a comprehensive systematic design process based on a circular model of nine interdependent elements. Updated and adapted by Gary Morrison, Steven Ross, and Kemp in 1994, the model is often labeled the 'MRK model'.

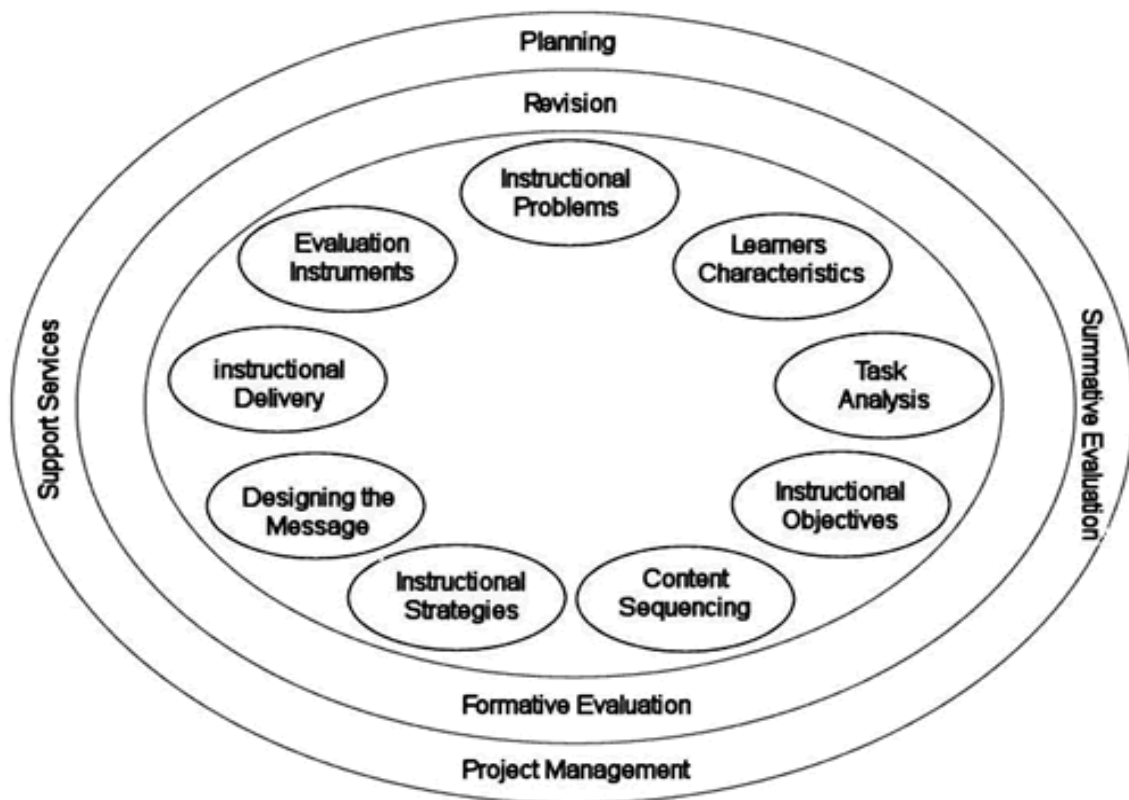
According to Gustafson (2002:48), the primary focus of this model is curriculum development, though it is also used for classroom instruction and one-day courses.

Unlike certain other instructional design models, the MRK approach “considers instruction from the perspective of the learner rather than from the perspective of the content” (Morrison et al. 2001:4). The MRK model deliberately focuses on the multiple factors that influence learning outcomes, including the level of readiness students need, the appropriateness of instructional strategies in terms of objectives and learner characteristics, suitability of media and other resources, support needed for successful learning, the best methods of evaluating achievement of objectives, and the revision of instruction should the program not meet expectations (Morrison et al. 2001:4).

Gustafson (2002:48) noted that the MRK model reflects the belief of Morrison, Ross, and Kemp that instructional design “is a continuous cycle with revision as an on-going activity associated with all the other elements”. As a general systems view of development, all elements are interdependent and may be performed independently, simultaneously, and in any order (Gustafson 2002:48-49). To avoid creating the impression of a linear process, the word *element* is used to label the nine aspects of the MRK instructional design process. Though the model seems to indicate that the designer can start anywhere and proceed in any order, the layout of the model clearly draws attention to the priority of identifying instructional problems and specifying the goals of instruction.

Figure 2.8: The MRK Model

(Morrison, Ross, and Kemp 2001:6)



The MRK model consists of nine interconnected elements (Morrison et al. 2001:6-8).

- (1) Identify instructional problems, and specify goals for designing an instructional program.
- (2) Examine learner characteristics that should receive attention during planning.
- (3) Identify subject content, and analyze task components related to stated goals and purposes.
- (4) State instructional objectives for the learner.
- (5) Sequence content within each instructional unit for logical learning.
- (6) Design instructional strategies so that each learner can master the objectives.
- (7) Plan the instructional message and delivery.
- (8) Develop evaluation instruments to assess objectives.

- (9) Select resources to support instruction and learning activities.

Though designed with the classroom in mind, the MRK model is flexible and relatively easy to use. Teachers/designers are free to work on any element in any order at whatever depth they choose. In addition, the model does not necessarily require the development of new material. Teachers/designers are free to select from existing instructional materials if appropriate. Similarly, preferred instructional strategies and media can be selected even before the content is analyzed. Though its importance should never be underestimated or neglected, the depth of front-end analysis (needs assessment, learner characteristics, context, content, and task components) in the MRK model is discretionary, as is the amount of formative evaluation.

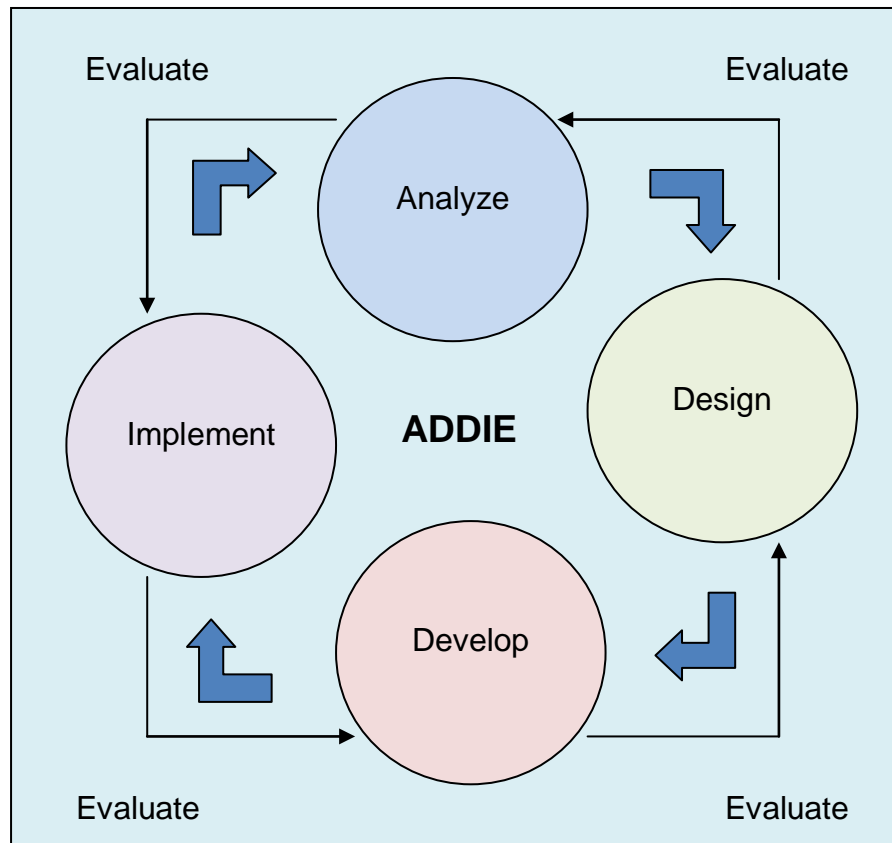
2.3.5 ADDIE (*Instructional Systems Design*)

Originally developed in 1975 for the U.S. military by the Center for Educational Technology at Florida State University, the so-called 'ADDIE' model has evolved into a generic approach to instructional systems design. More properly labeled 'system approach to training' (SAT) or 'instructional systems design' (ISD), the colloquial name ADDIE became popular in the mid-1990s after it was used by Michael Schlegel in *A Handbook of Instructional and Training Program Design* (1995). After an exhaustive search for the origins of the term, Molenda (2003:1) concluded that the label ADDIE seems to have evolved informally through oral tradition. Since there is no original, fully elaborated model, many scholars do not embrace or acknowledge the name 'ADDIE'. Though still largely unacknowledged by the academic world, the term 'ADDIE' is commonly embraced by training practitioners. To ignore the popularity of this label for instructional systems design seems rather foolish. Google searches for 'ADDIE model' and 'ADDIE instructional design' in February 2011 yielded about 500,000 and 55,000 results respectively. An acronym, ADDIE stands for analysis, design, development, implementation, and evaluation — the five essential elements of instructional systems design. Though originally conceived as a linear model, ISD evolved over two decades into a much more flexible, dynamic, interactive, iterative process, as

illustrated in Figure 2.9. It was after this evolution that the name ADDIE became popularized.

Figure 2.9: The ADDIE Instructional Design Model

(adapted from Clark 2011a)



As one might expect, ADDIE builds on and incorporates elements from other instructional design models, in particular those developed by Dick and Carey (1978) and Kemp (1994). The generic nature of ADDIE enables it to integrate easily with other models or aspects of instructional design.

Interestingly, the ADDIE instructional systems design process is not rooted in any particular learning theory. Rather it is a systems-based tool to assist in the design of effective instruction. “There are more than 100 different variations of ISD; however, almost all of them reflect the generic ‘ADDIE’ process” (Allen 2006:430). The advantage of ADDIE is that it guides the designer through a systematic process of determining training needs, designing and developing appropriate programs, processes, and materials, implementing training programs, and evaluating effectiveness (Gagné, Wager, Golas, and Keller 2005:21-42).

2.3.5.1 *The ADDIE Process*

As previously mentioned, the ADDIE instructional design system consists of five interactive, iterative processes — analysis, design, development, implementation, and evaluation. Based upon more recent interpretations of this model (Allen 2006:434-441; Gagné et al. 2005:21-42), the five phases are explicated below.

- (1) Analysis — As a prerequisite to the development of any training program or process, the instructional designer or developer analyzes job performance requirements and develops a corresponding task list. Job tasks are then analyzed in light of required skills, knowledge, and abilities. Incoming learners are assessed accordingly and the required instructional/learning needs and learning objectives are determined by the gap. Formative evaluation begins with this first phase.
- (2) Design — During the design phase, a detailed plan of instruction is formulated. Having compiled a learner analysis, and having determined learning objectives, the individual or team responsible for instructional design must make a number of critical choices that will affect training outcomes. An instructional strategy must be created. A successful strategy considers what content is essential in light of the learner analysis and learning objectives, how content should be grouped and sequenced, which instructional methods and tactics will be most effective, and how learner ‘mastery’ will be assessed. Each aspect of design and implementation must be planned with a view toward achieving the learning objectives. Assessments should endeavor to measure real learner progress towards the specified learning objectives. All of these steps usually result in the production of some sort of instructional design document. Formative evaluation plays a crucial role during this phase.
- (3) Development — The success of the development phase is predicated upon accurate analysis and effective design. Any unresolved issues tend to surface during this stage. In the development phase, curricula, materials, media, assessments, and trainer instructions and guides are compiled. Designers often create a prototype, then identify or develop suitable training materials, with a view toward achieving learning objectives in a manner most appropriate for the learners. The materials are then reviewed by key players and

subjected to pilot tests. Allen (2006:437) noted that during this phase, “instructional developers ... validate each unit and/or module of instruction and its associated instructional materials as they are developed”. Validation occurs through internal reviews for accuracy, individual and small-group trials, operational tests of the design system, and ongoing revision of modules or other design aspects based on feedback from formative and summative evaluation. The development phase is considered complete once all training materials have been compiled and validated.

- (4) Implementation — The ADDIE implementation phase follows design and development. At this stage, the actual instructional system becomes operational. Planning is critical to successful implementation. Schedules must be finalized, venues booked, trainers equipped, administrative processes initiated, learning environments prepared, and materials delivered. Learners must also be informed in advance of expectations and any pre-assignments. Poor implementation can easily thwart even the best-conceived designs. Both the operational aspects and learner performance are evaluated during this phase.
- (5) Evaluation — Evaluation continues throughout the entire cycle of the instructional system. According to Allen (2006:430-440), evaluation entails:
- formative evaluation, including process and product evaluations conducted during the analysis and design phases, as well as validations during the development phase.
 - summative evaluation, in the form of operational trials conducted as the final important step of validation in the development phase.
 - operational evaluation, critically examining all aspects of the operational system from both internal and external perspectives.

As the marketplace evolves, and as shortcomings in the ADDIE model continue to emerge, quality improvement through effective evaluation becomes increasingly important.

2.3.5.2 Shortcomings of ADDIE

The ADDIE ISD model has endured a significant amount of criticism over the years. Bichelmeyer (2004:3-4) noted,

Despite its hallowed place in IDT, various members of the field over the years have pointed out a number of compelling criticisms of the ADDIE model. Chief among these criticisms are that the ADDIE model is ineffective and inefficient (Gordon and Zemke, 2000), meaning that it does not necessarily lead to the best instructional solutions, nor does it provide solutions in a timely or efficient manner. In addition to being costly, in recent years the ADDIE model has been criticized because it doesn't take advantage of digital technologies that allow for less-linear approaches to instructional design such as rapid prototyping (Tripp and Bichelmeyer, 1991). Perhaps most importantly, Rowland (1993) has pointed out that the ADDIE model is not really the way instructional designers do their work.

In 2000, Gordon and Zemke (2000:43-53) published a widely quoted article in *Training* magazine criticizing the ADDIE process as slow and clumsy, costly, inflexible, linear, expert-driven, compliant rather than creative, out of touch with shifting perspectives on learning and design, and at best a pseudo-science in an artistic field. In response, Clark (2011a) commented that ISD is simply a tool, and that, as a tool, it must be used in a manner that is appropriate. Clark asserted that it is wrong to blame the tool for problems stemming from organizational culture, human misunderstanding, and inappropriate application. Confronting the assertion that ISD is more art than science, he commented,

Designing instruction is both art and science — which makes it a craft. Thus, a good designer uses the tools of the trade, knowledge and skills, and then combines these with a personal touch to create a quality product.... ISD [ADDIE] simply helps to keep one focused on the results desired (Clark 2011a).

As Bichelmeyer (2004:4) noted, in spite of criticism, the ADDIE model remains a foundational element in instructional design. However, she also acknowledged that a major part of the controversy associated with ADDIE lies in the understanding that, from an academic perspective, it is really more of a conceptual framework than a model.

Whether or not one labels ADDIE an authentic and relevant model, the ADDIE approach to ISD has proven to be enduring. As criticisms have emerged, the ADDIE ‘model’ has adapted, evolved, and remained popular as a tool to facilitate the process of instructional systems design.

2.3.6 Backward Design

The *backward design* model of instructional design was developed by Grant Wiggins and Jay McTighe as part of a broader framework of learning and curriculum design published in *Understanding by Design* (1998, 2005). As the name implies, backward design begins with the end in mind. Wiggins and McTighe (2000:8) explained that in backward design, “One starts with the end — the desired results (goals or standards) — and then derives the curriculum from the evidence of learning (performances) called for by the standard and the teaching needed to equip students to perform”. Until the designer is clear about which specific understandings are desired and what those understandings look like in practice, he/she cannot decide on *how* to teach for understanding or *what* material and activities should be used (Wiggins and McTighe 2005:14-15).

Backward design was born out of the desire to create instruction that avoids the ‘twin sins’ of activity-focused teaching and coverage-focused teaching, neither of which answers what Wiggins and McTighe (2005:3) consider to be the key question at the heart of learning — “what is really important?”

For Wiggins and McTighe, the key outcome of design is effective curriculum in the true sense of the word. Noting that the etymology of the word implies a “course to be run” with a clearly defined end in mind, the authors see the best curricula as those that specify “the most appropriate experiences, assignments, and assessments that might be used for achieving goals”, including “what the

learner should have achieved upon leaving, what the learner needs to do to achieve, and what the teacher needs to do to achieve the results sought” (Wiggins and McTighe 2005:6)

Backward design (and its larger framework of ‘understanding by design’) is not prescriptive in nature. Rather, it encourages the designer to think purposefully and carefully about design that has understanding as the goal (Wiggins and McTighe 2005:7).

2.3.6.1 The Backward Design Process

Backward design follows a three-stage process (Wiggins and McTighe 2005:17-19), each accompanied by helpful guiding questions.

(1) Identify desired results.

Guiding questions: What should students know, understand, and be able to do? What enduring understandings are desired?

This stage considers goals, content, and curriculum expectations and “calls for clarity about priorities” (Wiggins and McTighe 2005:18). Since available content is often excessive, this stage forces the designer to make decisions about the essential understandings desired.

(2) Determine acceptable evidence.

Guiding questions: How will we know if students have achieved the desired results? What will we accept as evidence of student understanding and proficiency?

Backward design considers “a unit or course in terms of the collected assessment evidence needed to document and validate that the desired learning has been achieved...” (Wiggins and McTighe 2005:18). Designers must consider beforehand how they will determine if students have really achieved the desired understandings. Validation of authentic learning rather than the covering content is the focus.

(3) Plan learning experiences and instruction.

Guiding questions: What enabling knowledge (facts, concepts, and principles) and skills (processes, procedures, strategies) will students need in order to perform effectively and achieve desired results? What activities will equip students with the needed knowledge and skills? What will need to be taught and coached, and how should it best be taught, in light of performance goals? What materials and resources are best suited to accomplish these goals?

In this stage, the designer plans learning experiences and instruction based upon clearly defined desired results and appropriate evidence of understanding. This stage defines the knowledge, skills, and procedures students must master, the best materials to use, and the learning/teaching activities needed to achieve the desired result.

What makes backward design somewhat unique is that designers must consider assessment *before* deciding on teaching content and methodology. “Backward design calls for us to make our goals or standards specific and concrete, in terms of assessment evidence, as we begin to plan a unit or course” (Wiggins and McTighe 2005:19). Instructional planning decisions about teaching methods, lesson sequence, and resource materials can only be successfully completed once desired results and assessments are defined and carefully considered. “Teaching is a means to an end. Having a clear goal helps to focus our planning and guide purposeful action toward the intended results” (Wiggins and McTighe 2005:19).

2.3.6.2 *The Ultimate Goal*

In backward design, enduring ‘understanding’ is the ultimate goal of instruction. Wiggins and McTighe (2005:84) have developed a six-sided view of the concept of understanding, the facets of which are viewed as manifestations of transfer ability. From their perspective, understanding is mature when learners:

Can explain – via generalizations or principles, providing justified and systematic accounts of phenomena, facts, and data; make

insightful connections and provide illuminating examples or illustrations.

Can interpret – tell meaningful stories; offer apt translations; provide a revealing historical or personal dimension to ideas and events; make the object of understanding personal or accessible through images, anecdotes, analogies, and models.

Can apply – effectively use and adapt what they know in diverse and real contexts; they can ‘do’ the subject.

Have perspective – see and hear points of view through critical eyes and ears; see the big picture.

Can empathize – find value in what others might find odd, alien, or implausible; perceive sensitively on the basis of prior direct experience.

Have self-knowledge – show metacognitive awareness; perceive the personal style, prejudices, projections, and habits of mind that both shape and impede their own understanding; are aware of what they do not understand; reflect on the meaning of learning and experience.

2.3.6.3 The Backward Design Template

Wiggins and McTighe have created a template (see Table 2.5) to guide designers in the use of the backward design model for the creation of curriculum or learning processes. The template features all three backward design stages and utilizes practical questions to guide the designer through the process.

Though backward design makes good sense, its non-traditional approach can create discomfort for teachers/designers. Wiggins and McTighe (2005:19) commented,

Table 2.5: Backward Design Template
(adapted from Wiggins and McTighe 2005:22)

Stage 1: Desired Results	
Established Goals: What relevant goals (e.g., content standards, course or program objectives, learning outcomes) will this design address?	
Understandings: <i>Students will understand that...</i> <ul style="list-style-type: none"> • What are the big ideas? • What specific understandings about them are desired? • What misunderstandings are predictable? 	Essential questions: What provocative questions will foster inquiry, understanding, and transfer of learning?
Students will know..., Students will be able to... <ul style="list-style-type: none"> • What key knowledge and skills will students acquire as a result of this unit? • What should they eventually be able to do as a result of such knowledge and skills? 	
Stage 2: Assessment Evidence	
Performance Tasks: <ul style="list-style-type: none"> • Through what authentic performance tasks will students demonstrate the desired understandings? • By what criteria will performances of understanding be judged? 	Other Evidence: <ul style="list-style-type: none"> • Through what other evidence (e.g., quizzes, tests, academic prompts, observations, homework, journals) will students demonstrate achievement of the desired results? • How will students reflect upon and self-assess their learning?
Stage 3: Learning Plan	
Learning Activities: What learning experiences and instruction will enable students to achieve the desired results? How will the design... W = Help the students know <i>Where</i> the unit is going and <i>What</i> is expected. Help the teacher know <i>Where</i> the students are coming from (prior knowledge, interests). H = <i>Hook</i> all students and <i>Hold</i> their interest? E = <i>Equip</i> students, help them <i>Experience</i> the key ideas and <i>Explore</i> the issues?	

R = Provide opportunities to *Rethink* and *Revise* their understandings and work?

E = Allow students to *Evaluate* their work and its implications?

T = Be *Tailored* (personalized) to the different needs, interests, and abilities of learners?

O = Be *Organized* to maximize initial and sustained engagement as well as effective learning?

[Backward design] is all quite logical when you come to understand it, but “backward” from the perspective of much habit and tradition in our field. A major change from common practice occurs as designers must begin to think about assessment *before* deciding what and how they will teach. Rather than creating assessments near the conclusion of a unit of study..., backward design calls for us to make our goals or standards specific and concrete, in terms of assessment evidence, as we begin to plan a unit or course.

This is the defining characteristic of the Wiggins and McTighe backwards design model.

2.3.7 Constructivism and Instructional Design

Traditionally, instructional design models have been anchored in empiricist views of knowledge and behaviorist models of teaching and learning. In the last twenty years, new models of instructional design have emerged based upon an interpretive paradigm of knowledge and a constructivist approach to learning (Willis 2009:3). Constructivism suggests that knowledge is constructed through experience, either by assimilation or accommodation. According to Savery and Duffy (1996:135-137), constructivism is rooted in three basic propositions. Perhaps the core concept, constructivism posits that understanding comes in interaction with the environment.

We cannot talk about what is learned separately from how it is learned, as if a variety of experiences all lead to the same understanding. Rather, what we understand is a function of the content, the context, the activity of the learner, and, perhaps most

importantly, the goals of the learner. Since understanding is an individual construction, we cannot share understandings, but rather we can test the degree to which our individual understandings are compatible. An implication of this proposition is that cognition is not just within the individual, but rather it is a part of the entire context, i.e., cognition is distributed (Savery and Duffy 1996:136).

A second proposition states that cognitive conflict stimulates learning and determines the nature of what is learned (Savery and Duffy 1996:136). Moreover, the learner's own goals are central to what is learned (Savery and Duffy 1996:136).

Additionally, the constructivist perspective asserts that

knowledge evolves through social negotiation and through the evaluation of the viability of individual understandings. The social environment is critical to the development of our individual understanding as well as to the development of the body of propositions we call knowledge (Savery and Duffy 1996:136).

Not all 'constructions' are equally viable. Understandings must be tested, most often in the social environment, to verify how effectively they allow us to interpret and function in the world around us.

The learning environment plays a key role in constructivism. A constructivist learning environment could be regarded as "a place where learners may work together and support each other as they use a variety of tools and information resources in their guided pursuit of learning goals and problem-solving activities" (Wilson 1996:5).

Honebein (1996:11-12) identified seven goals of a constructivist learning environment.

- (1) "*Provide experience with the knowledge construction process.*" The learner determines the learning focus, strategies, and methods. The role of the 'teacher' is primarily facilitation.

- (2) *"Provide experience in and appreciation for multiple perspectives."* Learners engage in processes that enable them to evaluate alternative solutions.
- (3) *"Embed learning in realistic and relevant contexts."* For learning to be most effective, designers and facilitators must endeavor to create and maintain an authentic learning context.
- (4) *"Encourage ownership and voice in the learning process."* Constructivism is student-centered. Learners play a key role in the entire learning process.
- (5) *"Embed learning in social experience."* Social interaction profoundly influences intellectual development. Thus, collaboration among learners and facilitators is critical.
- (6) *"Encourage the use of multiple modes of representation."* The learning experience should employ a rich variety of media to transmit knowledge and provoke engagement.
- (7) *"Encourage self-awareness of the knowledge construction process."* Knowing how we know is a key outcome in constructivist learning.

For constructivists, objects and events have no absolute meaning; rather, the individual interprets each and constructs meaning based on individual experience and evolved beliefs. Individuals construct knowledge as they attempt to make sense of their experiences (Hannafin and Hill 2002:77).

In recent years, a number of constructivist instructional models have emerged. Among the most prominent are cognitive apprenticeships, action learning, collaborative learning, problem-based learning, and situated learning. With the exception of cognitive apprenticeship, these approaches all entail groups working together to solve contextually relevant problems. Involving modeling, coaching, articulation, reflection, and forced exploration (Collins, Brown, Newman 1989:457-548), cognitive apprenticeship is a guided learning experience that focuses on cognitive and metacognitive skills. Situated learning is a function of the activity, context, and culture in which it occurs, usually a 'community of practice' that seeks to embody a certain set of beliefs or practices. In other

words, situated learning takes place in the very same context to which it applies (Lave and Wenger 1991).

Table 2.6: A Comparison of Objective-Rational and Constructivist Instructional Design Models

(adapted from Willis 2009:22-24)

Objective-Rational Models	Constructivist Models
Epistemology : positivism, postpositivism	Epistemology: interpretivism, hermeneutics
Learning/Instructional Theories: behaviorism, information processing theory, cognitive science, instructionism, direct instruction	Learning/Instructional Theories: constructivism, social constructivism, Deweyan progressive education theories.
The ID process is sequential and linear.	The ID process is recursive, nonlinear, sometimes chaotic.
Planning is top down and systematic.	Planning is organic, developmental, reflective, and collaborative.
Instructional objectives guide development.	Objectives gradually emerge from design and development work.
Experts with special knowledge are required for effective instructional design.	There are no general instructional design experts.
Careful sequencing, the teaching of subskills, and events of instruction are important for the learning of preselected content.	Instruction emphasizes learning (personal understanding) in meaningful contexts.
Summative evaluation is valued to see if the instructional system is effective.	Feedback-based formative evaluation is critical.
Objective data at all stages are critical to success.	Subjective data may be the most valuable.

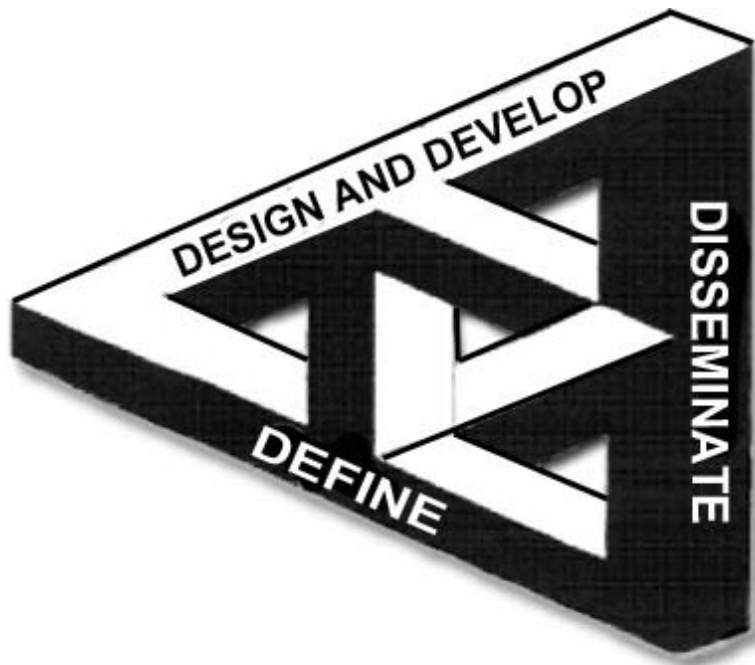
2.3.8 The R2D2 Model of Jerry Willis

Originating from NASA's Johnson Space Center and the Center for Information Technology in Education at the University of Houston, the *reflective and recursive design and development (R2D2) model* developed by Jerry Willis is one of the best known constructivist instructional design models (Willis 1995, 2000; Willis and Wright 2000). Like most objectivist-rational ID models, the R2D2 model has several components — Define, Design and Develop, and Disseminate. Unlike

traditional ID models, the R2D2 model is non-linear, with each of the components serving as *focal points* rather than steps. Usually undertaken as a group effort, the R2D2 design process can start at any focal point and is purposefully recursive (iterative) and reflective in nature.

Figure 2.10: The R2 D2 Model

(Willis 1995)



Willis' illustration of the R2D2 model is quite informative. Inspired by Escher's impossible triangle,

the graphic representation of the model is deliberately non-linear. There are no obvious starting and ending points because the model assumes that designers will work on all three aspects of the design process in an intermittent and recursive pattern that is neither predictable nor prescribable. The focal points are, in essence, a convenient way of organizing our thoughts about the work (Willis and Wright 2000:5).

Willis (1995:5-23) noted that there are essential differences between the R2D2 model and traditional instructional design models. In particular, instead of following a predominantly linear flow, the R2D2 model is *recursive*, with issues

and questions addressed repeatedly throughout the design process, and decisions reached gradually as alternatives are considered over the life of the project. In addition, rather than emphasizing the initial development of objectives at the beginning and subsequent summative evaluation at the end, the R2D2 process places maximum emphasis on the creative process itself. Rich in reflection, the whole instructional design process is viewed as a learning experience that leads to improvements in the instructional process and material being developed. “It is active, authentic, social, and collaborative because it occurs during the process of development and involves a team of participants who cooperate to make decisions” (Willis 1995).

The three fundamental focal points — Define, Design and Develop, and Disseminate — may be addressed or revisited at any point of the design process.

2.3.8.1 The Define Focus

In the R2D2 model, the ‘Define’ focus includes three activities: creating and supporting a participatory team, progressive problem solution, and the development of phronesis (contextual understanding). All three activities must be attended to throughout the entire process (Willis and Wright 2000:6).

The participatory team can take many forms, but as Willis and Wright (2000:7) noted, teams “will require thoughtful support and careful arrangement of ... opportunities to participate, if the members are to do their best as collaborators”. A well-supported team is more likely to make progress in solving problems in the context. With a well-supported team, progress is made and solutions emerge throughout the entire design process. Moreover, for this approach to be effective, the designer cannot be a stranger to the context. The R2D2 model does not recognize the existence of detached ‘expert designers’.

2.3.8.2 The Design and Develop Focus

Unlike traditional instructional design models, the R2D2 model integrates ‘design and develop’ into one focal point (Willis and Wright 2000:8). Willis and Wright point to the recent rapid technological advances in the field to justify this

perspective. In the original version of R2D2 (Willis 1995), the design and development focus included selection of materials and format, consideration of the development environment, design and selection of an evaluation strategy, and product design and development. With the release of a revised version in 2000 (Willis and Wright 2000), terminology was changed to avoid confusion. By far the most intense part of the R2D2 model, the ‘design and develop’ process entails the following aspects.

Selection of a Development Environment — Attempting to strike a balance among power, flexibility, and accessibility,

selection of a development environment is often a process of compromise that considers the makeup of the participatory team, the type of work being done, and the degree of involvement to be expected from different team members. The development environment actually consists of two components: the *tools of design* and the *process of design* (Willis and Wright 2000:9).

Tools of design refer to everything needed to develop the design. Although Willis acknowledges a number of constructivist design approaches,⁵ he prefers a four level process including component design, a single-path prototype, an alpha version, and a beta version (Willis and Wright 2000:9).

Cooperative Inquiry — Originally labeled formative evaluation, this aspect of design and development “gathering data that is used to make decisions about

⁵ Willis and Wright (2000:10-11) mentioned other design options as well. Bodker, Gronbaek, and Kyng (1995) suggest a four phase approach that includes learning about the context, envisioning the future, using organizational games to develop consensus on curricula and instructional activities, and the creation of new instruction using prototypes and mock-ups. Good (1995) uses a five phase participatory design process — form a working team and build relationships, make contextual inquiry, brainstorm ideas about potential instruction, create storyboards and scenarios, engage in an iterative process of design. Salomon (1995) suggests a process of iteration using progressively improved prototypes in an effort to develop a final product — an initial design specification phase, a feedback intensive storytelling prototype phase, and a functional prototype phase in which users provide input that helps create a final effective product.

how to improve the material you are working on” (Willis and Wright 2000:9). Cooperative inquiry entails two or more people conducting research on a topic through their own unique experience, moving a through cycles of experience and reflection. “Each person is co-subject in the experience phases and co-researcher in the reflection phases” (Heron 1996:1). As Willis and Wright (2000:11) explained,

R2D2 is not based on the assumption that there is one true design for a particular set of instructional materials. Rather, it is based on the assumption that a participatory team comes to some agreement on what its members consider to be local truth, and they base their work on that socially constructed truth.

Product Design and Development — Willis et al. (1994:371) suggested that “designers and developers need to be able to ‘walk around’ the program and try out possible alternative designs and arrangements with regular and ongoing feedback from potential users and consumers”. With a supportive development environment, any changes made by the team can be tested immediately to discern the effect from the perspective of students. This non-linear, real-time approach to design supports innovation and creativity. Citing Reigeluth, Willis and Wright (2000:15) suggested that instructional design must go beyond traditional direct inspection.

Reigeluth (1997:1) suggested that instructional design theories are needed

not just in the cognitive domain, where we need theories for fostering understanding, building higher order thinking skills, developing metacognitive skills, designing problem-based and interdisciplinary or thematic learning environments, and tailoring instructional guidance to specific content-area idiosyncrasies, but also in the affective domain, where we need guidance for ... ‘emotional intelligence’ and for ... ‘character education’, as well as how to develop attitudes and values and so forth. Instructional theory has been construed much too narrowly in the past.

From a constructivist perspective, “Expanding beyond direct instruction to include the creation of student-centered learning environments, as well as resources that learners can use, is certainly a step in the right direction” (Willis and Wright 2000:15).

2.3.8.3 The Dissemination Focus

Traditional models of instructional design often include four activities in their dissemination stage – summative evaluation, final packaging, diffusion, and adoption. With the exception of summative evaluation, the R2D2 model is similar. However, instead of placing emphasis on the ‘correct’ use of material, constructivists emphasize the importance of context in diffusion and adoption (Willis and Wright 2000:15). An important emphasis must be placed upon helping teachers and learners adapt material and use it effectively in the local context. Since R2D2 focuses on a specific context, summative valuation does not play a prominent role.

2.3.9 Jane Vella’s Design Steps for Dialogue Education

Developed by adult education guru Jane Vella, and inspired by the Paulo Freire’s problem posing theory (1972), Malcolm Knowles’ andragogy (1980, 1984), and Kurt Lewin’s (1946) field theory of motivation (Vella, Berardinelli, and Burrow 1998:1), *dialogue education* is a form of popular education based on the assumption that “adult learning is best achieved in dialogue” (Vella 2002:3).

Considered by Knowles “one of the most gifted adult educators I have known” (Knowles, in Vella 2002:vii), Vella has engaged in community education, staff development, and other adult learning processes in forty nations (including many in Africa), working with governments, non-governmental organizations, health professionals, religious leaders, educationalists, and trainers.

Vella’s (2002:3) approach to adult education is based on her belief that “adult learning is best achieved in dialogue. *Dia* means ‘between’, *logos* means ‘word’. Hence, dia + logue = ‘the word between us’ “.

What I have discovered is that the dialogue is where learning really can occur for both teacher and participants.... I have learned that dialogue is not, as Socrates described it, only between teacher and student but rather also among students. In the kind of dialogue designed with these principles and practices, the teacher discovers herself to be a learner among learners, learning with her adult colleagues even as she designs the learning and manages the course. Small groups of adult students create a healthy learning environment — safe, challenging, demanding dialogical learning. My colleagues and I discovered over the past seven years that our aim was not teacher-centered learning, nor was it learner-centered learning. It was learning-centered learning: pragmatic, focused, accountable, sure (Vella 2002:xiv-xv).

The foundational assumption underlying dialogue education is that *teaching is for learning* (Vella 2008:xvi). From Vella's perspective, 'good teaching' results in 'good learning'. "All that we do in dialogue education — all the principles and practices, all the strategies and technical aspects, all the design and materials, all the decisions — are toward learning" (Vella 2008:xxiii).

Employing a guided constructivist approach, dialogue education views learners as subjects who act upon content rather than objects to be acted upon or to be 'taught'. The teacher's responsibility in dialogue education is not to act as the ultimate controlling authority, but to design and facilitate an experience of 'dialogic mediation' involving students and teachers/facilitators "inquiring into, working with, and reasoning about" the learning content in a cooperative manner (Gravett and Petersen 2002:282).

Therefore, dialogic teaching is neither content, learner, nor teacher-centered, but *learning-centered* with the teacher serving the role of mediator. In dialogic teaching the teacher mediates between students' existing ways of thinking and doing and the formal knowledge (new learning content) with its associated way of thinking and doing, which students need to appropriate. (Gravett and Petersen 2002: 282)

Vella's perspective is reflected in the statement, "Don't ever do what the learner can do; don't ever decide what the learner can decide" (Vella 2002:16).

Vella (2008:3) finds four key strengths in dialogue education. It has *structure* that encourages learning. It is *social* in that learning tasks take place in small groups. It is *sound* because it is based on selected principles and practices. It is *sure* in setting evaluation indicators for learning, transfer, and impact.

An fundamental tool in dialogue education is the *learning task*, which, according to Vella (2001::xiii), is an effective way to structure dialogue. Ensuring that learners engage with new content, a learning task is an open question posed to members of a small group, who have already been given the resources needed to process the task and respond.

2.3.9.1 Vella's Twelve Principles of Effective Learning

With her passion for effective learning (not just teaching), Vella has applied her research and experience toward the development of the following 'twelve principles for effective adult learning', all of which contribute toward the creation of a healthy learning environment by nurturing dialogue and learning among teachers and students (Vella 2002:3-27).

(1) Learning needs and resources assessment

The learning needs and resources assessment (LNRA) reflects standard practice in adult learning. The purpose of an LNRA is discovering "what the group really needs to learn, what they already know, what aspects of the course that we have designed really fit their situations" (Vella 2002:5). Listening to the expectations and needs of learners helps the designer/facilitator to design a program of immediate usefulness to the adult learner. "People are naturally excited to learn anything that helps them understand their own themes, their own lives" (Vella 2002:5-6). The needs assessment is best initiated by this essential question: "Who needs what as defined by whom?"

(2) Safety in the environment and learning process

According to Vella (2002:8), 'safety' ensures that "the design of learning tasks, the atmosphere in the room, and the very design of small groups and materials convey to the adult learners that this experience will work for them". The creation of a sense of safety guides the designer's hand during the learning needs and resources assessment, in the planning, and at the beginning of the learning event. A sense of safety creates an inviting and secure environment for adult learners.

Five factors contribute to this atmosphere of safety (Vella 2008:8-9).

- "Trust in the competence of the design and the teacher."
- "Trust in the feasibility and relevance of the objectives."
- "Allowing small groups to find their voices."
- "Trust in the sequence of activities, beginning with simple, clear, and relatively easy tasks ... before advancing to more complex and more difficult ones".
- "Realization that the environment is nonjudgmental and lavish in affirmation."

(3) Sound relationships among teacher and learners

The power of relationships in learning is very important. In dialogue education,

Sound relationships for learning involve respect, safety, open communication, listening, and humility.... In order to be sound, this relationship must transcend personal likes and dislikes and obvious differences in wealth and power (Vella 2002:10-12).

(4) Sequence of content and reinforcement

According to Vella (2002:13), sequence and reinforcement are vital principles of adult learning that are often neglected. Sequence refers to "the programming of knowledge, skills, and attitudes in an order that goes from simple to complex and from group supported to solo efforts". Reinforcement

entails the “repetition of facts, skills, and attitudes in diverse, engaging, and interesting ways until they are learned”. The teacher/facilitator is accountable to design a learning process that works for learners, not just the ‘teacher’.

(5) Praxis: action with reflection or learning by doing

Vella (2002:14) applies the term ‘praxis’ to the process of “doing with built-in reflection”. From her perspective, the principle of ‘praxis’ serves as “a warning against academic verbiage that concentrates on elusive and often esoteric concepts as though the abstract concepts were the reality” (Vella 2008:93-94). A critical aspect of the learning task, praxis promotes constructed knowing by providing learners the opportunity to “grapple with theory and skill, to make it theirs, and to make it fit their life and context” (Vella 2008:94). In this sense, praxis makes new content relevant to a learner, increasing the likelihood of constructed knowing and eventual transfer into the context.

(6) Respect for learners as decision makers

Adult learners are decision-makers in life and should not be treated as ‘objects’ in a learning experience. “In dialogue education, we assume that people are not designed to be used by others. Adults need to understand that they themselves decide what occurs for them in the learning event” (Vella 2008:15-16).

(7) Ideas, feelings, actions

The best adult learning is holistic in nature, including the cognitive, affective, and psychomotor domains (ideas, feelings, and actions). When learning experiences include all three aspects, meaningful learning is far more likely. (Vella 2008:95-96).

(8) Immediacy of the learning

Adults learn best when they see the immediate usefulness of new knowledge, skills, or attitudes. Most adults want to spend ‘learning

time' acquiring something that will make an immediate difference. When this is absent, learners often withdraw from courses. "The immediacy perceived by learners will affect their determination to continue working" (Vella 2002:19).

Adults learn throughout their lives; but transitional stages such as a new job or a major shift in responsibility motivate much of this learning. Though adult learning preferences vary, most prefer learning activities that are problem-centered and relevant to their life situation. They learn best when learning outcomes have "some immediacy of application" (Brookfield 1991:31).

(9) Clear roles and role development

The role a teacher embraces normally reflects that person's teaching philosophy. In order to facilitate dialogue, Vella shies away from a position of dominance as the 'expert' in the learning process. "Adult students need reinforcement of the human equity between teacher and student and among students" (Vella 2002:20). Balancing this perspective, Vella emphasizes that "the role of teacher must be spelled out explicitly and clearly, and the role of each person in a learning group must be defined as well". Clear roles enhance the work of learning. "The clearer the role of teacher and learners, the more precise the demands of that role, the more complete the learning" (Vella 2008:101-102).

Varying contexts often require role adjustment. Culture, in particular, influences perceptions concerning the role of the teacher.

A contextually adapted philosophy simply means adult educators need to adapt their underlying belief systems in response to different contexts to assume the most appropriate roles for helping adult learners achieve transformation and emancipation (Wang and Sarbo 2004:205).

(10) Teamwork and use of small groups

In dialogue education, learning tasks are usually undertaken in small groups or teams, though some of the work may be done individually. When small groups work together well, the learning is better for everyone (Vella 2008: 102-103).

The concept of 'teamwork' aligns closely with cultural norms in many parts of Africa. Drawing similarities between adult education principles and *ubuntu*, Nafukho (2006:412) commented,

The practical aspect of *ubuntu* is the formation of self-help groups. In Kenya, for example, it is referred to as *harambee*, meaning pooling together resources to help each other make a living (Nafukho, 1994). It emphasizes the need for cooperation, moral, emotional, and social support, and group work. In southern Africa, it is referred to as *shosholoz*a (teamwork or work as a team).

(11) Engagement of the learners in what they are learning

Engagement physically, mentally, and emotionally is critical to effective learning. "When learners are engaged, they must be engaged at the level of criticism and construction of the theory. It is not enough to engage adult learners in repetition of the teacher's perceptions..." (Vella 2008:105).

The criteria for enhancing meaning for learning are engagement and challenge. At its most basic level, engagement is a meaningful response to something. In engagement the learner is active and may be searching, evaluating, constructing, creating, or organizing some kind of material into new or better ideas, memories, skills, values, feelings, understanding solutions, or decisions.... By making adult learners' goals, interests, and perspectives part of learning, instructors can create with them a system that evokes meaning and involvement in learning. A challenging learning experience in an engaging format about a relevant problem ... is intrinsically motivating because it increases the range of conscious

connections to fulfilling purposes that are important to adults (Wlodkoswski 2004:148-149).

(12) Accountability: how do they know they know?

Vella views accountability as one of the foremost principles of adult learning, but who is accountable to whom? According Vella (2002:25), accountability exists on several levels. “The design of learning events must be accountable to the learners.” The learning that was proposed must take place. It must be observable in the learners. In addition, the learners are accountable to one another and to the teacher to participate wholeheartedly in the learning experience. Moreover, learners are accountable to make content immediately useful in their context. “Accountability is a synthesis principle — it is the result of using all the other principles” (Vella 2002:25).

2.3.9.2 Vella’s Design Steps for Dialogue Education

Dialogue education is carefully structured to promote dialogue, learner engagement, and authentic transfer of learning. The structure of dialogue education is found in Vella’s *eight design steps* (Vella 2008:31-50). Vella’s use of the word ‘design’, as opposed to planning, is deliberate.

Planning is not what we do in education. The term assumes a control over curriculum and learners that does not exist. We plan—and life constantly intervenes. In education, we design. Designing means preparing a flexible structure for inviting and enhancing learning by explicitly naming who is present, what the situation is that calls for this learning, the time frame and the site for the event, the comprehensive content and learning objectives (achievement-based objectives—ABOs), and finally, the learning tasks and necessary materials (Vella 2008:31).

Each of these steps is expressed in a simple question, the answer to which helps define and develop an effective learning experience for the both the teacher/facilitator and the participants.

Step 1: Who?

The first priority in the design of dialogue education is identifying who the participants and course leaders will be and understanding their needs and expectations. Effective design requires foreknowledge of learners, their motivation for involvement, and the level of their knowledge or skill (Vella 2008:32-33). A well-executed *learning needs and resources assessment* provides the information needed to design an effective learning experience (Vella 2008:19-29).

Step 2: Why?

The steps 'Who?' and 'Why?' are intimately connected. From Vella's perspective, 'Why?' describes the situation that calls for the training, not the purpose. 'Why' do the 'Who' need to learn? (Vella 2008:33-35). This requires an understanding of the day-to-day world of the learners and the challenges they face.

Step 3: So that?

This step looks ahead to anticipated learning outcomes. How will things be different as a result of this joint learning experience? Originally added in *On Teaching and Learning* as 'So what?' (Vella 2008:133-134), this step focuses on the transfer of learning into the actual life and context of the learner after the education/training experience and helps to create accountability. "Without specific, explicit indicators of transfer, a training program or a course has not been accountable" (Vella 2008:134). The effectiveness of a dialogue education process is determined by three evaluation indicators — learning, transfer to context, and impact on the participants or their organization (Vella 2007:217-219). As a guided constructivist approach with a focus on transformative learning, dialogue education seeks not only to facilitate desired changes on the job but also to impact the very culture of organizations.

Step 4: When?

In this step, the designer examines the exact time frame to ensure that the 'What?' (content) is realistic for the amount of time available and appropriately

packaged to result in constructed knowing during the time frame (Vella 2008:36-37).

Step 5: Where?

“Where learning and teaching take place deeply affects the potential of the learning” (Vella 2008:38-39). Dialogue education involves learning tasks in small groups; and this demands a healthy, appropriately equipped learning environment, even if it has to be created. This step also considers broader arrangements, such as accommodation, transportation, and meals.

Step 6: What?

This step and the next go together. ‘What?’ entails determining specific content for the ‘Who?’ and ‘When?’ in light of the ‘Why?’ This content includes skills, information, and perspectives that will be the focus of the learning. This is then linked directly to achievement-based objectives.

Step 7: What for?

Vella noted that this step could be called “what learners will have done with the content in order to learn it” (Vella 2008:41). ‘What for?’ is expressed in achievement-based objectives (as opposed to outcome-based objectives). Achievement based objectives (ABOs) indicate what the participants will do to learn the content effectively. They are usually expressed in a statement like “By the end of this course, the participants will have....” ABOs are achieved through well-designed learning tasks. “ABOs tell what the learner will do in the session to begin to learn the material. Completed ABOs serve as learning indicators” (Vella 2008:45).

Step 8: How?

This last step develops the “guide for the facilitation of learning exercises in which all learners build their skills and share their learning” (Goetzman 2012). Each achievement-based objective is developed into one or more structured, sequenced learning tasks, which participants do to learn the content and

accomplish the achievement based objectives (Vella 2008:45). The 'learning task' is a key result area in Vella's design process.

A learning task is an open question put to learners who have all the resources they need to respond. The open question in the learning task is the heart of the matter, inviting critical thinking, demanding reflection, stimulating creativity.... Every learning task involves a solid, substantive set of resources that the learners use to respond to the open questions. These resources are the new content (ideas, feelings, and skills). They can be presented to the learners in a lecture, an illustrated talk, a video clip, a slide show, a learned article that they all read, a summary article, an outline, a model, a story.... The list is virtually infinite (Vella 2001:8-10).

Vella (2001:33-48) describes four types of learning tasks — inductive, input, implementation, and integration. Inductive tasks begin with the lives and experiences of the learners and help them clarify where they stand in terms of new content, setting the stage for learning. In input tasks, the learner works with new content presented in a variety of engaging methods with a view toward personalization and application to context. Implementation tasks offer opportunities "to review and integrate concepts, practice skills, and examine and practice new attitudes within the session, course, or class" (Vella 2001:45-46), providing an opportunity for assessment. Integration tasks provide learners with the opportunity to apply what has been learned to their lives and work contexts, often using future scenarios to encourage transfer.

Learning tasks integrate lecture and laboratory. A learning task is an excellent way to present new content, inviting engagement and reflection and action on that content. The learning task is not an add-on ("Let's now do a little exercise to see if you've got it"). The learning task is not a testing task. Rather, it is part of an integrated design, presenting new content in a variety of ways, with engaging work for the learner built in. It structures the dialogue (Vella 2001:5).

Table 2.7: How Dialogue Education Differs From Traditional Training

(Global Learning Partners 2012a)

Factor	Traditional Training	Dialogue Education
Typical Methods Used	Lectures, PowerPoint presentations, sometimes with questions and answers afterwards	Learning tasks in which participants draw from their own experience, engage with new content, apply it, and consider its application to their context
Monologue vs. Dialogue	Monologue (lecture), sometimes with question and answers afterwards	Dialogue among participants and with teacher throughout workshop
Accountability	Accountability to teacher	Mutual accountability between teacher and participants and between participants
Whose Knowledge Counts	Teacher's knowledge	Everyone's knowledge
Deductive vs. Inductive Knowledge	Favors deductive knowledge	Supports both deductive and inductive knowledge
Content vs. Process	Focus on delivering content	Content through process
Learning Styles	Primarily auditory; some visual (PowerPoint)	Visual, auditory, and kinaesthetic
Learning Domains	Strong for teaching in cognitive learning domain	Strong for cognitive, affective, and psychomotor learning domains
Types of Objectives	Clear teaching objectives	Clear achievement-based objectives
Learner's Experience	Unless speaker is dynamic, the experience can be boring but rigorous; often with little retention of new content	Engaging AND rigorous; often with high retention of new content
Evaluation Methods	Evaluation in academic settings is done through testing (but often not possible in many adult learning settings). There may be feedback on presentations.	Evaluation is embedded in achievement of ABOs observed during workshops. Quality of participation as judged by participants and facilitator. Tracking of transfer and impact.
Strengths / Weaknesses	Content rich. Considered more academic, rigorous, and professional. Requires little preparation, privileges auditory learners, leads to low sense of ownership and ineffective learning.	Can cover a lot of content in a short time at a deeper level through praxis. High ownership of learning process by participants. Takes time to prepare well.

An effective learning task “is congruent with the named purpose, appropriate for the named learners and leaders, and suitable for the identified time and the described place. It teaches the content and achieves the learning objectives” (Vella 2008:31).

2.4 Conclusion: Instructional Design and Church-based Training

Instructional design ... is simply a process for helping you create effective training in an efficient manner. It is a system ... that helps you ask the right questions, make the right decisions, and produce a product that is useful and usable as your situation requires and allows (Piskurich 2006:1).

2.4.1 The Value of Instructional Design

From its humble beginnings in the mid-twentieth century, the field of instructional design has blossomed and undergone extensive evolution. The early behavioral perspectives evident in Skinner's (1954) programmed instruction and Gagné's (1985) events of instruction eventually gave way to cognitive/behavioral systems-based models such as those offered by Dick and Carey (Dick, Carey, and Carey 2002, 2005) and Smith and Ragan (1999, 2004). Even these well-known models underwent significant change, reflecting the move away from linear, top-down models toward the iterative, non-linear, learner-centered design reflected in the MRK model (Morrison et al. 2001). With the shift toward postmodernism and constructivism, the field of instructional design has continued to change. While acknowledging the importance of learner-centeredness, flexibility in design, and learning through experience, traditional systems-based models remain focused on front-end analysis, clear learning objectives, appropriate instructional strategies, and meaningful evaluation. Other models such as Willis' R2D2 (Willis and Wright 2000) and Vella's (2002, 2008) dialogue education have embraced a constructivist learning perspective.

Table 2.1: Comparison of Reviewed Instructional Design Models

Models	Context of Application	Theoretical Perspective	Required Expertise	Characteristics
Gagné Events	Lessons, workshops, online modules	Behaviorist/ cognitivist	Moderate	Linear – a step-by-step process to create an external learning environment that supports cognitive processes
Dick & Carey	Formal or non-formal courses, modules, instructional products	Behaviorist/ cognitivist	Designed for novices, suitable for all	Systems-oriented, comprehensive, linear or nonlinear, with formative and summative evaluation
Smith & Ragan	Formal or non-formal courses or curricula (usually for dissemination)	Cognitivist/ behaviorist	Moderate to high; usually involves a team	Systems-oriented, comprehensive, nonlinear, with extensive front end analysis, development of new material, formative and summative evaluation; can be resource intensive
MRK	Classroom lessons, curricula, one-day courses	Cognitivist/ behaviorist	Suitable for all	Systems-oriented, nonlinear, iterative; learner-centered, includes management & support
ADDIE	Formal or non-formal courses that focus on problem-solving	Cognitivist/ behaviorist	Moderate to high; often involves a team	Generic, systems-oriented, linear/nonlinear, five distinct stages with formative and summative evaluation; integrates well with instructional models
Backward Design	Formal or non-formal classes, sessions, modules, curricula	Cognitivist	Moderate, designed for teachers	Begins with the desired end in mind, determines assessment criteria before selection of content, focuses on enduring understanding, relatively linear; includes a helpful template
R2D2	Non-formal or formal problem-solving	Constructivist	Uses a participatory team with varying levels of expertise	Recursive, reflective, non-linear, collaborative design process that focuses on learning in meaningful contexts; no pre-set objectives, no summative evaluation
Vella	Workshops, short courses, problem solving	Structured Humanist/ Constructivist	Low to high depending upon ABOs	Uses seven questions to design a dialogue-based, guided experience facilitating transformative learning, transfer to context, and organizational impact

Informed by an appropriate assessment of organizational problems and/or learners' needs, models of instructional design assist designers to define learning objectives, develop and implement instructional strategies, and evaluate the effectiveness of learning. As Morrison et al. (2001:11) noted, "The proof of an instructional plan's success will be whether a satisfactory level of learning is

achieved in an acceptable period of time”. In reality, there is no ‘best’ or universal model for designing instruction. Rather, each model featured in this review suits particular challenges and circumstances. Though instructional design models feature differences based on underlying theoretical perspectives and their context of application, they all share a common and ultimate purpose — effective, efficient, enduring learning.

2.4.2 Implications for Leadership Development in the Local Church

Preliminary research has shown that South African churches characteristically employ traditional, classroom-based, teacher-centered, content heavy approaches to leadership development, the effectiveness of which is questionable. For church leaders committed to the development of effective leadership training processes, an awareness and application of essential principles and practices of instructional design could prove valuable. This chapter has explored various instructional design models with a view toward gleaning generic principles and practices that can be applied toward the design of transformational training processes in the local church. Certain aspects of the instructional design process should be considered foundational to the design of training processes with transformational intent. However, it is important to note that the models featured in this chapter were developed with the non-expert in mind and churches would obviously be free to use any model(s) they deem appropriate for their specific context and needs.

When considering training solutions, church leaders often look for quick and easy answers. Perhaps the best way forward lies not in the pursuit of easy answers, but in learning to ask the right questions, a fundamental aspect of effective design common to most instructional design models. Indeed, church leaders seeking to develop transformational leadership development processes would do well to consider the basic questions voiced by Vella (2008:32-33), Smith and Ragan (1999:5), and Morrison, Ross, and Kemp (2001:5) — questions that identify the most critical aspects of the instructional design process.

Smith and Ragan (1999:5) ask three key sets of questions, which outline the instructional design process.

- (1) Where are we going? (What are the objectives of the instruction?)
- (2) How will we get there? (What instructional strategy and instructional medium will best accomplish the goals?)
- (3) How will we know when we have arrived? (In what ways should we assess learning? How will we evaluate and revise the instructional materials?)

These questions reflect the three essential phases of instructional design – analysis, strategy, and evaluation. Though inherent in the analysis phase of the Smith and Ragan (1999) model, Morris, Ross, and Kemp (2001:5) add two very important questions to the list: “For whom is the program being developed?” and “What are the characteristics of learners or trainees?”

Supporting this perspective and challenging the content-driven mentality so common in church training courses, Vella (2008:32) contended,

[T]he first question to ask when designing an educational program is not *What!* (the content) but *Who?* (participants and leaders)... This is the operative question, because the learning of these men and women is the given purpose of any learning design.

Vella added that the accompanying question to *Who?* is *Why?* “What is the situation that calls for this learning event?” (Vella 2008:33). Understanding the *Who?* and the *Why?* are fundamental to decisions concerning the *What?* and the *How?* Hence, the creation of effective training processes begins with *Who?* and *Why?*, not *What?* and *How?*

Nonetheless, the *What?* and *How?* are an intrinsic part of the training process. Designers must ask themselves, “Bearing in mind the needs and context of the learners and the situation that calls for the training, what essential knowledge, skills, or attitudes must be learned; and what is the most effective way to facilitate this process?” When the need is understood, and the objective is clear, the design and development of instructional strategy and material can be focused to address the problem or need, without burdening the learners, teacher(s)/trainer(s), or designer(s) with extraneous content. As backward

design advocates, perhaps it is wise to define 'success' before any design takes place.

And what about evaluation, both of the design and the learner? Sadly, evaluation of authentic learning, enduring understanding, transfer to context, and organizational impact is rarely part of the local church leadership training process. Yet, if no meaningful evaluation takes place, both measuring success and improving effectiveness become difficult. Most instructional design models build in procedures that not only facilitate an accurate assessment of learning, but also lead to improvements in the design of learning processes themselves.

Though there is certainly merit in every model examined, it is these foundational questions, in particular, that must guide process used to design transformational leadership development processes in the local church. As such, these questions will be carried forward, synthesized, and integrated into the recommended practices detailed in chapter six.

As Morrison et al. (2001:5,11) noted,

Four fundamental components — learners, objectives, methods, and evaluation — form the framework for systematic instructional planning.... The proof of an instructional plan's success will be whether a satisfactory level of learning is achieved in an acceptable period of time.

Applying key instructional design principles and practices as highlighted in this chapter, or even just asking the right questions, could do much to make church-based leadership development processes far more effective, meaningful, and transformational.

Chapter Three

A Review of Scholarly Literature on Adult Learning

3.1 Introduction to Adult Learning Theory

Any church-based initiative seeking to train and develop Christian leaders will benefit from an appropriate understanding of adult learning theory, adult education, and the adult learner.

Though the concept of 'learning' is often associated with formal education, adults continue to learn throughout life in a variety of contexts. Much of this learning is motivated by shifting social, economic, and technological demands (Merriam and Caffarella 1999:6); but adults often learn simply out of interest. As Jarvis (1987:11) observed, adult learning rarely occurs in isolation from the world in which the adult lives; rather, "it is intimately related to that world and affected by it". Whether a corporate manager facing a new responsibility, a maintenance worker endeavoring to use a new vacuum cleaner, or an emerging Christian leader embracing the call to lead a small group, the need for new knowledge, values, and skills often serves as a key motivator for adult learning.

"Embedded in the notion of adult education is the belief that adult learners are different from children and that there should be a separate theory that underpins the teaching and learning of adults" (Fasokun, Katahoire, Oduaran 2005:9). Most scholars and practitioners in the field of adult education argue that children and adults learn in different ways. Perhaps the first to make a strong case for the

recognition of adult learning as a distinct field of study was Malcolm Knowles (1968, 1973, 1980, 1984). Knowles traced the birth of modern adult learning theory to two separate streams of inquiry — Thorndike's 1928 scientific research on the ability of adults to learn and Lindeman's (1926b) publication of *The Meaning of Adult Education*. According to Knowles, these laid the foundation for systematic theory on adult learning (Knowles, Holton, and Swanson 1998:36-37). From rather humble beginnings, the related fields of adult learning and adult education have evolved into a large and diverse discipline. Numerous theories have been advanced and the field has become increasingly complex. In spite of this, no unifying central theory of adult learning or education has ever emerged; and the original debate concerning the need for a separate theory of adult learning continues to this day!

3.1.1 Purpose and Structure of This Chapter

The purpose of this chapter is to review scholarly literature on theories of adult learning and education with a view toward identifying concepts and practices that can be applied to transformational leadership training and development in the South African church. This review focuses on three specific areas of interest. The first section focuses on characteristics of adult learners. The second section includes an overview of the most prominent streams or theoretical orientations toward adult learning. The final section highlights aspects of adult learning theory and adult education that might add value to a transformational church-based leadership training process.

3.1.2 Defining Adult Learning — No Simple Task

"Each time I read the introductory chapters of a graduate student's thesis, I witness the struggle to review and define adult learning" (Cranton 2006:1). Highlighting the definitional hurdles faced by academics and practitioners in field of adult learning, these words grace the opening page of one of the most heavily cited and highly rated books⁶ on adult learning. As a renowned researcher,

⁶ Understanding and Promoting Transformative Learning: A Guide for Educators of Adults (2006)

author, and adult educationalist, Patricia Cranton acknowledges that, in spite of fifty years of research, theorizing, and debate, there is still no concise, clear, uniformly accepted definition of adult learning.

Though this project does not seek to contribute to the discussion on 'adult learning', it is important to arrive at some sort of understanding of what this expression means. However, before attempting to define or describe this term, it seems prudent to consider first the individual terms 'adult' and 'learning'.

Several approaches have been used in an attempt to define an 'adult'. Simple approaches describe adulthood in terms of physical or legal age. However, these definitions leave much to be desired. A number of researchers have asserted that adulthood is reached after an individual develops through a series of specific stages. While still embracing a developmental view, others conclude that adulthood in many societies or cultures is defined in terms of the achievement of certain set of culturally significant criteria such as independence, self-reliance, or autonomy. As Merriam and Brockett (2007:4) pointed out, in today's world adulthood is considered to be a sociocultural construction. The determination of what constitutes an adult is constructed by a society or culture at a particular period in its development. These criteria often vary significantly from culture to culture and from community to community.

According to a survey conducted by Furstenberg, Kennedy, McCloy, Rumbaut, and Settersten (2003:6), ninety-five percent of Americans consider "education, employment, financial independence, and the ability to support a family" to be important markers on the path to adulthood. In Africa, the concept of adulthood can be even more complex, with variations evident in different ethnic, cultural, and community contexts. Though western culture has undoubtedly affected perspectives on adulthood in many communities, the ability to perform certain roles or functions in society is normally viewed as the primary indicator of adulthood (Fasokun et al. 2005:16-20). Fasokun et al. (2005:20) described adulthood in Africa as

by Patricia Cranton.

people of 18 years or older, having self-directing images of themselves, and able to relate stories, proverbs, and legends from the collective memory of the community for the purpose of informing, educating, and socializing the young ..., capable of performing a range of social and economic roles, from helping to run the home, contributing to production or income generation to participation in community affairs.

The ethnic and cultural diversity in South Africa makes defining the criteria for adulthood somewhat perplexing. In light of the various considerations, perhaps simpler is better. Patterson (1979:13) defined adults (in most societies) as people who by virtue of their age, though not necessarily mature, are required to evince the basic qualities of maturity.

For the purposes of this project, an adult is a person who is of legal age and has embraced the responsibilities associated with adulthood.

The act or concept of 'learning' is easier to define. Ormrod (1999:3) defined learning in two ways. From the behavioral perspective, learning is a relatively permanent and observable change in behavior resulting from experience. From a cognitive perspective, learning is a relatively permanent change in mental associations resulting from experience. This internal change cannot be directly observed. Woolfolk (2006:206) explained that whether deliberate or unintentional, conscious or unconscious, correct or incorrect, learning has occurred when there is an enduring change in behavior or knowledge as a result of experience.

Even as learning theories have arisen in an attempt to explain how organisms learn, so adult learning theories seek to explain how adults learn. Over the past half century, a multitude of theories have been advanced, so much so that it seems there are as many learning theories as there are theorists! However, the basic premise behind adult learning theory is that adults learn differently from children. *How* this learning takes place is what stimulates the on-going debate and research in this ever-expanding field.

Adult learning must be distinguished from adult education. Adult learning theory focuses on the internal processes by which an adult gains new knowledge, skills, or values, whether planned or unplanned. Adult education, on the other hand, is concerned with planned educational activities that seek to facilitate adult learning (Merriam and Brockett 2007:6). These two fields are intimately related; and since the primary focus of this project is the design of transformational leadership training processes in the local church, this chapter will examine elements of both.

Corley (2008:1) noted that adult learning is complex, personal, and context bound; and that, to date, there is no single 'all-encompassing theory' that provides an adequate explanation of how adults learn. Nonetheless, the large numbers of theories, models, sets of assumptions, principles, and explanations that have emerged have led to the development of an expansive and diverse knowledge base for adult learning. Familiarity with this knowledge base can only serve to enhance the effectiveness of adult educators.

3.2 The Adult Learner

Central to both adult learning theory and adult education is the uniqueness of the adult learner. According to Cranton (2006:2),

Adult learners are mature, socially responsible individuals who participate in sustained informal or formal activities that lead them to acquire new knowledge, skills, or values; elaborate on existing knowledge, skills, or values; revise their basic beliefs and assumptions; or change the way they see some aspect of themselves or the world around them.

Long (2004:23-37) observed that perspectives on adult learners often lie on opposite extremes of a continuum. The pessimistic view sees adults as less capable than young learners (in line with the old saying, "You can't teach an old dog new tricks"), or, at best, as grown up children. In contrast, many adult education professionals see adults as highly motivated 'super learners'. The truth lies somewhere in between. Long further noted that the perspective a teacher, facilitator, curriculum designer, or policy-maker holds on adult learners

is very important. Beliefs directly influence behavior; and with lifelong learning becoming more prominent, it is essential to have some grasp on the nature of the adult learner.

The first to make specific claims concerning the uniqueness of adult learners was Eduard Lindeman in *The Meaning of Adult Education* (1926b). Knowles, Holton, and Swanson (1998:37) summarized Lindeman's perspectives into five succinct statements.

- "Adults are motivated to learn as they experience needs and interests that learning will satisfy."
- "Adults' orientation to learning is life-centered."
- "Experience is the richest source for adults' learning."
- "Adults have a deep need to be self-directing."
- "Individual differences among people increase with age."

Interestingly, Lindeman did not contrast learning among adults with learning among young people, but rather adult learning with the conventional teacher/content-centered approach to education (Knowles et al. 1998:37).

Inspired by Lindeman and others, Malcolm Knowles (1968, 1973, 1980, 1984) developed an extended set of assumptions about the adult learner; and it is upon these that his concept of andragogy is based. (Andragogy will be examined later in this chapter.) Seeking to make a clear distinction between the adult learner and child learner, and between adult learning and traditional pedagogy, Knowles was careful to highlight the fundamental differences in the assumptions underpinning each perspective.

Knowles proposed the following characteristics as unique to adult learners (Knowles et al. 1998:64-69).

- (1) *Adults need to know why they need to learn.* In the same manner in which Paulo Freire (1970, 1974, 1992) endeavored to raise the consciousness of Brazilian peasants, the adult educator has a responsibility to help adult learners become aware of their 'need to know'.

- (2) *Adults have a self-concept of personal responsibility* and are used to making their own decisions. As such, they usually prefer to be treated by others as capable of *self-direction*.
- (3) *Adults have a vast amount of experience*, and this experience is unique for each individual. As such, not only are adults 'learners', but they are also resources for the learning of others. Recognizing the value of this experience is important, as adults often derive much of their identity from life experiences. The uniqueness of each adult's experience also lends weight to the value of individualizing learning processes.
- (4) *Adults become ready to learn when what they need to know or learn to do enables them to cope better with real-life situations*. Thus, adult learning experiences are most effective when they correspond with periods of development.
- (5) *"Adults are life-centered (or task-centered or problem-centered) in their orientation to learning"* (Knowles et al. 1998:67). Adults are motivated to learn when they believe that learning will help them better perform tasks or deal more effectively with real-life situations.
- (6) *The most potent motivators for adult learners are internal pressures* such as increased job satisfaction, self-esteem, and quality of life. Though adults do respond to some external motivators such as a promotion, an increase in salary or benefits, or a better job, intrinsic factors serve as stronger motivations for adult learning.

While many practitioners in the adult education field have uncritically embraced (and even enhanced) Knowles' assumptions, they are not without criticism. In particular, Cranton (2006:3-4) expressed concern about the extent to which adult education practitioners have touted self-direction as a characteristic of adult learning (and thus a characteristic of their approach to education), noting that Knowles merely stated this to be a *preference* of the adult learner.

While there may be many motivations for adults to learn, researchers and adult educators alike recognize that the most common thread among adult learners is a 'problem orientation' (Long 2004:28). Dewey (1933:13), one of the earliest adult education advocates, recognized that perplexity and challenges to the adult

mind were primary motivators for the type of reflective thinking that leads to learning.

Another factor largely embraced by both scholars and practitioners is the unique role of experience in the adult learner. Both Cranton (2006:4-5) and Long (2004:33) pinpoint the experience of the adult learner as the key characteristic that sets adult learning apart and enhances the richness of the learning environment.

In spite of the areas of agreement, physiological, psychological, sociological, experiential, spiritual, and cultural diversity among adults makes it very difficult to describe a generic 'adult learner' (Long 2004:25). Yet, as Long noted, if we are to engage with adults as a unique group of learners, some sort of balanced understanding of normative adult characteristics must be achieved.

3.3 Key Learning Theories

In the last 100 years, the considerable research devoted to understanding, explaining, and advancing human learning has resulted in the advancement of more than fifty theories of learning. The development of one comprehensive theory of human learning and, in particular, adult learning, has proven elusive. As Merriam (in Knowles, Holton, and Swanson 1998:1) noted,

It is doubtful that a phenomenon as complex as adult learning will ever be explained by a single theory, model or set of principles. Instead, we have a case of the proverbial elephant being described differently depending on who is talking and on which part of the animal is examined.

In the first half of the twentieth century, the exploration of learning behavior was driven primarily by psychologists. In the 1960s, educators who worked with adults began to advance their own ideas about adult learning and how it differs from learning in childhood. To this day, researchers in both psychology and education continue to wrestle with the nature of learning. As Merriam (in Knowles et al. 1998:2) noted, "We are headed, it seems, to a multifaceted

Chapter 3: A Review of Scholarly Literature on Adult Learning

understanding of adult learning, reflecting the inherent richness and complexity of the phenomenon”.

Table 3.1: Six Orientations to Learning

(adapted from Merriam and Caffarella 1999:264; Swanson and Holton 2009:195)

ASPECT	BEHAVIORIST	CONGNITIVIST	HUMANIST	SOCIAL LEARNING	CONSTRUCTIVIST	HOLISTIC
Learning Theorists	Pavlov, Thorndike, Guthrie, Watson, Hull, Skinner	Ausubel, Bruner, Gagné, Koffka, Kohler, Lewin, Piaget, Tolman	Maslow, Rogers, Knowles	Bandura, Rotter	Candy, Dewey, Lave, Piaget, Rogoff, von Glasersfeld, Vygotsky	Yang, Jarvis, and Parker
View of the Learning Process	Change in behavior	Internal mental process (including insight, information processing, memory, perception)	A personal act to fulfill potential	Interaction with and observation of others in a social context	Construction of meaning from experience	Involves facets of explicit, implicit, and emancipatory knowledge
Locus of Learning	Stimuli in external environment	Internal cognitive structuring	Affective and cognitive needs	Interaction of person, behavior, and environment	Internal construction of reality by individual	Occurs as a result of interactions with and between knowledge facets
Purpose of Education	Produce behavioral change in desired direction	Develop capacity and skills to learn better	Become self-actualized, autonomous	Model new roles and behavior	Construct knowledge	Systematization Participation Transformation
Teacher's Role	Arranges environment to elicit desired response	Structures content of learning activity	Facilitates development of the whole person	Models and guides new roles and behavior	Facilitates and negotiates meaning with the learner	Facilitator
Manifestation in Adult Learning	Behavioral objectives Competency-based education, Skill development and training	Cognitive learning Intelligence, learning, and memory as a function of age Learning how to learn	Andragogy Self-directed learning	Socialization Social roles Mentoring Locus of control	Experiential learning Self-directed learning Perspective transformation Reflective practice	Holistic and dialectical perspective Dynamic

In an effort to bring some order to the chaos created by this proliferation of theories, several scholars have made efforts to develop a taxonomy of learning orientations. After initial efforts by Hilgard and Bower (1966), Reese and Overton (1970), and Knowles (1984), Merriam and Caffarella (1991) grouped these theories into four broad classifications or ‘orientations to learning’ reflecting their understanding of the major streams of thought in the adult learning field — behaviorist, cognitivist, humanist, and social/situational. New theories continued to emerge and taxonomies had to be updated. Merriam and Caffarella (1999) added the ‘constructivist’ orientation; and Swanson and Holton (2009) further enhanced this taxonomy by adding the ‘holistic’ orientation to learning. However, even this has proven inadequate. Table 3.1 on the previous page features a taxonomy synthesized from these sources.

Because of the complexity and diversity in the adult learning field, this section will focus on nine prominent theories that could influence approaches to the design of church-based training.

- Behaviorism
- Cognitivism
- Social cognitive theory
- Andragogy
- Experiential learning and learning styles
- Constructivism
- Multiple intelligences
- Transformative learning
- Holistic learning

3.3.1 Behaviorism

Behaviorism emerged in the USA at the beginning of the twentieth century against the backdrop of American Progressivism, a social and political movement that spurred the development of social sciences and the belief that science should be applied to benefit society. During this period, the relatively new academic field of psychology was seeking legitimacy as a science. Though much

attention was being devoted to the introspective study of consciousness and mental processes, a number of psychologists rejected this non-scientific approach, seeking instead to focus on observable behavior. Essentially, 'behaviorism' was born out of a desire for respect, a search for practical application, the need to generate a behaviorist body of theory, and a need to provide an empirical basis for animal psychology (Mills 1998:23).

As a learning theory, behaviorism assumes that all behaviors are acquired through conditioning as a result of interaction with the environment. To the behaviorist, learning is seen as a change in behavior (Merriam, Caffarella, and Baumgartner 2007:276). Behavioral learning theories are built upon one or both of two principal non-cognitive explanations for learning — contiguity (the simultaneity of stimulus and response events) and the effects of or responses to behavior (reinforcement and punishment) (Lefrancois 1988:29). According to Merriam and Caffarella (1999:252), the ultimate goal of education from a behavioral perspective is to produce behavioral change that will ensure survival of the human species, societies, and individuals. Though popular in the first half of the twentieth century, behaviorism has lost its prominence as a learning theory due to the more recent emergence of theories recognizing the role of cognitive processes in learning.

A number of researchers and theorists including Ivan Pavlov (1849-1936), Edward L. Thorndike (1874-1949), John B. Watson (1878-1958), Edward R. Guthrie (1886-1959), Clark L. Hull (1884-1952), and B. F. Skinner (1904-1990) contributed to the development of behaviorism.

3.3.1.1 Thorndike's Theory of Connectionism

Edward L. Thorndike, a long-time professor of psychology at Columbia University, was the first American academic to engage in systematic research on animal and human learning. A prolific researcher and writer, Thorndike conducted pioneering work in learning, educational practices, intelligence testing, transfer of training, and the application of quantitative measures to socio-psychological problems among others (Hergenhahn 1988:55). Like most in the behaviorist school, he proposed that psychology must remain as independent of

introspection as possible (Thorndike 1911:5). Typical of behaviorists, he also conceived of unlearned, inexperienced animals and humans as 'blank slates' that could learn when a random or automatic response to a particular stimulus was consistently rewarded.

In particular, Thorndike experimented with cats in a puzzle box. Food was visible outside the box. Initially, the cats behaved aimlessly. However, when they by chance responded correctly, the cats were rewarded with food. As the experiment was repeated, cats formed a 'connection' between the stimulus and desired behavior. Based on this study, Thorndike concluded that animals and, by extension, humans learn through trial and error, forming or strengthening connections between stimuli and responses based upon satisfaction or annoyance.

This stimulus–response learning became known as 'connectionism'. Connectionism posits that learning occurs through associations between stimuli and responses without consideration of internal mental states. In this theory, these stimulus-response associations are the 'connections' that guide all behavior and learning (Leonard 2002:36).

Thorndike eventually developed three 'laws' which described his understanding of learning (Knowles, Holton, and Swanson 1998:25). They can be summarized accordingly.

- (1) The *law of readiness* refers to the circumstances under which a learner tends to be satisfied or annoyed, to welcome or to reject learning.
- (2) The *law of exercise* asserts that connections strengthen with practice and weaken somewhat with disuse.
- (3) The *law of effect* asserts that connections strengthen or weaken as a result of consequences. Does the consequence contribute to satisfaction or annoyance?

Thorndike's theory has met with a number of criticisms. Mishra (2008:269) noted that Gestalt psychologists criticized the 'law of exercise' because it focused completely on exercise while ignoring the role of insight. On the other hand, other behaviorists were critical of the 'law of effect' because of its reliance on the

potentially subjective states of satisfaction and annoyance. Connectionism has also been labeled as reductionist due to its totally mechanistic perspective.

3.3.1.2 Ivan Pavlov and Classical Conditioning

Russian physiologist Ivan Pavlov was also one of the first to research stimulus and response. While conducting studies on the canine digestive system, he became interested in involuntary (reflex) salivation observed in dogs about to feed. Pavlov found that salivation could be triggered by a variety of stimuli when these stimuli were characteristically associated with imminent feeding (Pavlov 1927). These experiments led to the development of 'classical conditioning', the formation or strengthening of an association between a neutral stimulus (such as a bell) and a specific reflex response through recurrent presentations of neutral stimulus together with an unconditional stimulus (such as food).

A form of behavior modification, classical conditioning entails three steps. First, a neutral stimulus (NS) is given, which evokes no response. The neutral stimulus is then combined with an unconditional stimulus (UCS) which already elicits a reflex or unconditional response (UCR). By the third stage, the organism manifests the desired response in association with the once-neutral stimulus. The once-neutral stimulus has become a conditional stimulus (CS), resulting in a conditional response (CR).

Pavlov's research focused on involuntary or reflex behavior. Huitt and Hummel (1997) explained that, in classical conditioning, no new behaviors are learned. Instead, through pairing the neutral stimulus and the unconditional stimulus, an association is merely developed that yields that the same involuntary response to both events/stimuli.

Pavlov's research significantly influenced well-known behaviorists John B. Watson and B. F. Skinner and stimulated the development of behavioral learning theory.

3.3.1.3 John B. Watson — *The ‘Father’ of Behaviorism*

A contemporary of Thorndike, John B. Watson is often considered the founder of behaviorism. In what has become known as the ‘Behaviorist Manifesto’ (originally delivered as a lecture in 1913), Watson argued a totally mechanistic approach to human and animal development and the importance of limiting study to observable behavior.

Psychology as the behaviorist views it is a purely objective experimental branch of natural science. Its theoretical goal is the prediction and control of behavior. Introspection forms no essential part of its methods, nor is the scientific value of its data dependent upon the readiness with which they lend themselves to interpretation in terms of consciousness (Watson 1994:248).

Watson’s manifesto was inspired by Pavlov’s experimental success with classical conditioning (Hauser 2005). Watson believed that people were “an assembled organic machine ready to run” (Watson 1930:269) and that “their personalities were a collection of complex habits” (Baumgartner 2001:30). Noted for strong rhetoric and overstating, Watson’s (1930:82) perspective on the nature of man and human learning is reflected in his famous statement,

Give me a dozen healthy infants, well-formed, and my own specified world to bring them up in and I’ll guarantee to take any one at random and train him to become any type of specialist I might select — doctor, lawyer, artist, merchant-chief and, yes, even beggar-man and thief, regardless of his talents, penchants, tendencies, abilities, vocations, and race of his ancestors. I am going beyond my facts and I admit it, but so have the advocates of the contrary and they have been doing it for many thousands of years.

Watson conducted research on both animals and humans. Though originally an epiphenomenalist, believing that mental thoughts are byproducts of bodily events and not a cause of behavior, he eventually hardened his perspective and embraced physical monism, denying the existence of consciousness altogether

(Hergenhahn 2005:376). As such, Watson advocated the ignoring of consciousness in scientific study, proposing instead that psychology should “take as a starting point, first the observable fact that organisms, man and animal alike, do adjust themselves to their environment” (Watson 1994:250) and “secondly, that certain stimuli lead the organisms to make responses (Watson 1994:250-251). From Watson’s perspective, for any given response, the stimuli were predictable; and with any given stimuli, the response was predictable. As a result of Watson’s influence, behaviorism flourished, dominating perspectives and research in human psychology and learning (Hauser 2005).

While highly regarded in the field of behavioral psychology, Watson was plagued by failures in his personal life and family relationships. He was forced to step down from his professorship at Johns Hopkins University due to an affair with a graduate student, after which he left academic pursuits and entered the field of advertising. The questionable ethics in his “Little Albert” experiment also drew severe criticism. Albert was a child who was conditioned by Watson and his assistant researcher to fear white rats. Watson’s own granddaughter, actor Mariette Hartley, published a very transparent book called *Breaking the Silence* (1990), in which she criticized Watson and the impact of his theory on their family life and culture in general.

3.3.1.4 Clark G. Hull and Drive Reduction Theory

One of the most influential American psychologists in the mid-twentieth century, Clark Hull sought to explain learning and motivation through empirically validated, objective laws of behavior. He is particularly noted for two works, *Mathematico-Deductive Theory of Rote Learning* (1940), and *Principles of Behavior* (1943). The latter profoundly affected learning theory, making Hull’s perspective on animal learning and conditioning the dominant learning theory of the time.

Like other behaviorists, Hull believed behavior to be the result of interaction between the organism and its environment. Unlike his forerunners, however, he conjectured that an unobservable factor influenced behavior and learning — the organism’s need for adaptation to survive in its environment. A Darwinian, Hull considered learning as a key to effective adaptation. According to Hull, “when

survival is in jeopardy, the organism is in a state of need..., so the organism behaves in a fashion to reduce that need” (Schultz and Schultz 1987:238). Hull theorized that an organism’s behavioral responses arise from tissue-driven biological drives. These drives act as stimuli, resulting in behaviors that seek to reduce the drives. Successful drive reduction serves as the reinforcement. ‘Drive reduction theory’ derives its name from this last characteristic. The ability of organisms to adapt to biological conditions in order to ensure survival was considered evidence of learning. Interestingly, Hull also acknowledged the existence of secondary drives and reinforcements, which he viewed as further evidence of learning (Schultz and Schultz 1987:240-241).

Hull was unique in his fascination with the development of a mathematical perspective on learning and behavior. So convinced was he that behavior could be mathematically described that he said, “Psychologists must not only develop a thorough understanding of mathematics, they must think in mathematics” (Schultz and Schultz 1987:239). After years of experimentation, he developed a complex formula known as the ‘Global Theory of Behavior’ to measure motivation, and a special machine to assist in his calculations. Hergenhahn (2005:399) noted that Hull was the only psychologist to apply comprehensive, scientific theory toward the development of what he hoped would be a self-correcting hypothetico-deductive theory of learning (Hull 1943:382). Though his theories stimulated a lot of research, the complexity of Hull’s research methodology and, in particular, the precision with which he defined variables, made general application problematic.

3.3.1.5 B.F. Skinner and Radical Behaviorism

A highly influential psychologist, social philosopher, and inventor, B. F. Skinner was the founder of ‘radical behaviorism’, a philosophical approach to behavioral psychology rooted in the ‘experimental analysis of behavior’. A prolific author, he published twenty-one books and contributed numerous articles to professional journals. An atheist and determinist, Skinner was overt in his assertion that

to have a science of psychology at all, we must adopt the fundamental postulate that human behavior is a lawful datum, that it

is undisturbed by the capricious acts of any free agent — in other words, that it is completely determined (Skinner 1947:23).

Like other behaviorists, he firmly held to the view that initiating causes for behavior lie exclusively in the environment and not within the organism (Skinner 1988:73).

According to Skinner (1972: 257-258), the object of his research was

to discover the functional relations which prevail between measurable aspects of behavior and various conditions and events in the life of the organism. The success of such a venture is gauged by the extent to which behavior can, as a result of the relationships discovered, actually be predicted and controlled.

Skinner suggested prediction and control, and not the testing of theories and hypotheses, as the primary goals of science (Delprato and Midgley 1992:1508). To achieve success in predicting and controlling behavior, Skinner felt it essential to follow an inductive process, deriving general laws of behavior only after exhaustive studies of individual organisms (Goodwin 2009:417). He clearly opposed the hypothetico-deductive method that was popular among behavioral psychologists in the previous generation.

Skinner (1966) called his methodology for analyzing the relationship between an organism's behavior and its environment 'experimental analysis of behavior'. According to Blackman (1974:217-218), experimental analysis of behavior includes three elements:

- (1) experiments using free operant techniques in which behavior is measured in terms of the frequency with which the operant act occurs.
- (2) steady-state methodology, in which organisms are under stringent experimental control in varying conditions with a view toward developing a scientific understanding of behavior.
- (3) a philosophical perspective that psychology should relate observable behavior to consequences and avoid explanations related to unobservable processes or events.

As Delprato and Midgley (1992:1509) observed, Skinner's methodology hinged on the connection among experimental functional analysis, functional relations, and what he called 'controlling variables', the independent variables of functional relations that enable the prediction and control of behavior.

Skinner's primary research focus was *operant conditioning* (also known as instrumental conditioning), in which "behavior *operates* upon the environment to generate consequences" (Skinner 1953:65). This type of conditioning employs either positive or negative consequences to modify the behavior of an organism. A 'reinforcer' is any event that increases the strength or frequency of the behavior. Positive reinforcers entail some sort of reward; negative reinforcers involve the removal of unpleasant consequences. In contrast, a 'punishment' decreases the strength and frequency of behavior. A positive punishment adds an unpleasant consequence, whereas a negative punishment removes a favorable outcome. In his study of operant conditioning, Skinner often utilized a variety of schedules of reinforcement. He considered the rate of response the most critical variable to measure (Mkhize 2008:119-131).

Skinner (1969:7) was meticulous in his methodology, insisting that the formulation of interaction between an organism and its environment specify the occasion upon which a response occurs, the response itself, and the reinforcing consequences — the interrelationships among which are the 'contingencies of reinforcement'. Skinner firmly believed that it was these contingencies of reinforcement that change individual behavior (Skinner 1988:409).

Skinner had a profound impact on education and teaching practices. Concerned about the challenges teachers faced, he developed a teaching machine to reinforce learning and a system known as 'Programmed Instruction'. He also authored *The Technology of Teaching* (1968) to address problems in education through the application of operant conditioning, improvement of learning conditions, and the use of physical science and mechanical and electronic devices to make learning more efficient and effective. Skinner's focus was on expediting learning rather than 'teaching' in the classical sense. He envisioned a technology of teaching founded on an empirically verified knowledge of human behavior. For Skinner, "the application of the principles of operant conditioning to

teaching is simple and direct, for teaching is a matter of arranging contingencies of reinforcement under which students learn” (Pai 1973:94).

Skinner’s perspectives have evoked varied reactions over the years. As Catania and Harnad (1988:3) noted, “B. F. Skinner is perhaps the most honored and the most maligned, the most widely recognized and the most misrepresented, the most cited and the most misunderstood” of all behavioral psychologists.

3.3.1.6 Characteristics, Criticisms, and Contributions of Behaviorism

Merriam and Caffarella (1999:251) highlighted three critical assumptions that underlie behavioral learning theory. First, learning is manifested by a change in behavior; so observable behavior (as opposed to internal processes) is the only legitimate focus of study. Second, behavior is shaped by the environment, not by the individual. Third, the learning process is best explained by the principles of contiguity and reinforcement.

Ormrod (1999:10-11) identified seven essential assumptions common to behaviorist perspectives.

- (1) Equipotentiality — “Principles of learning apply equally to different behaviors and to different species of animals.”
- (2) “Learning processes can be studied most objectively when the focus of study is on stimuli and responses.”
- (3) “Internal cognitive processes are largely excluded from scientific study.”
- (4) “Learning involves a change in behavior.”
- (5) “Organisms are born as blank slates” (tabula rasa).
- (6) “Learning is largely the result of environmental events”. A behaviorist would be inclined to say that organisms are *conditioned* by environmental events.

- (7) “The most useful theories tend to be parsimonious”, involving the simplest assumption(s).

Behaviorism as a learning theory has many critics. Perhaps the most obvious objection lies in behaviorism’s rather limited view of human learning, which places the locus of control in the environment and completely ignores the cognitive element. In addition, behavioral theories essentially ignore factors such as free will and internal affective influences such as feelings and emotions. Behaviorism also fails to account for learning unrelated to forms of conditioning and reinforcement.

In spite of the criticism, behaviorism has contributed significantly to education, human resource management, and certain types of counseling. Classical conditioning can be used to stimulate positive emotions in the classroom or work environment and to mediate anxiety and fear. Operant conditioning, and especially positive reinforcement, have proven valuable in skills training and the promotion of behavioral changes. Punishment, appropriately applied, has also shown to be effective at modifying negative behaviors. Organizations regularly use operant conditioning to modify behavior by setting standards, adjusting the work environment, and rewarding desired responses in a meaningful way. In addition, operant conditioning has been applied to a number of educational approaches including programmed instruction, computer-assisted instruction, mastery learning, learning contracts, and behavior modification.

3.3.2 Cognitivism

As a learning theory, cognitivism maintains that human learning occurs as events, experiences, and new information are integrated into an active, organized storage system in the mind. Emerging in the late 1920s, cognitivism challenged the assumptions and methodologies associated with behaviorism and, during the ‘cognitive revolution’ of the 1950s, became the dominant learning theory. Unlike behaviorism, cognitivism is concerned with an “internal, symbolic mental processing system that focuses on learning schemas and ... on how the brain receives, internalizes, and recalls information” (Leonard 2002:30). For the cognitivist, humans are not passive beings shaped by their environment, but

beings capable of actively shaping the environment as they learn (Swanson and Holton 2009:198). Though cognitive theorists readily acknowledge the value of behaviorist concepts such as contiguity, repetition, and reinforcement, they view learning as involving the acquisition of new information resulting in a reorganization of the cognitive structures through which humans process and store information (Good and Brophy 1990:187).

According to Pritchard (2009:32), cognitivists see learning as

a relatively permanent change in mental associations as a result of experience. The changes in mental associations are internal and cannot be easily observed. The importance of mental activity (engagement) for effective learning is at the heart of the way that cognitive psychologists describe and understand the process of learning.

3.3.2.1 Origins

Cognitivism grew out of Gestalt theory, a holistic approach to psychology developed in the early twentieth century in Germany by Wertheimer, Koffka, and Köhler. Koffka systematized Gestalt psychology into a coherent theory and introduced it to the United States. His application of Gestalt theory to developmental psychology, perception, and learning had a substantial impact on psychology and education in the United States (Alic 2001:356-357). Focusing primarily on the processes of perception, these theorists surmised that, to the mind, the whole (the 'big picture') is more meaningful than the sum of the parts. Moving past comprehension of individual components to perception of the whole was a clear indicator to these theorists that 'cognition' takes place. When Kohler's (1917) research with apes demonstrated that the mind forms patterns and develops 'insight', Gestalt psychology was well positioned to issue a strong challenge to behaviorism's mechanistic view of humanity and learning. According to Merriam and Caffarella (1999:253), Gestalt learning theorists made significant contributions to cognitivism in the areas of perception, insight, and meaning.

Adding fuel to the fire, pragmatic educationalist Boyd H. Bode released the rather witty *Conflicting Psychologies of Learning* in 1929, highlighting inherent weaknesses in the behaviorist perspective on learning. Cognitive aspects of learning received even greater attention when Tolman's (1932,1948) research demonstrated that rats were able to develop 'mental maps' and adjust to changes in their mazes (Hergenhahn 2009: 427-435).

A major point of conflict between these two theoretical perspectives was locus of control. Behaviorists placed locus of control in the environment; but Gestalt psychologists looked to the individual's mental processes. This shift away from the environment to the individual, and, in particular, the individual's mental processes, is a primary characteristic of cognitivist learning theories (Merriam and Caffarella (1999:254).

Ormrod (1999:168-170) highlighted seven basic assumptions of cognitivism.

- (1) "Some learning processes may be unique to human beings."
- (2) "Cognitive processes are the focus of study."
- (3) "Objective, systematic observations of human behavior should be the focus of scientific enquiry; however, inferences about unobservable mental processes can often be drawn from such behavior."
- (4) "Individuals are actively involved in the learning process."
- (5) "Learning involves the formation of mental associations that are not necessarily reflected in overt behavior changes."
- (6) "Knowledge is organized."
- (7) "Learning is a process of relating new information to previously learned information."

A number of psychologists, including Swiss psychologist Jean Piaget (1896-1980) and American psychologists David Ausubel (1918-2008) and Jerome Bruner (1915-), contributed to the development of cognitive learning theories. However, cognitivism is often most closely associated with information processing theory, which was originally inspired by the invention of the computer and the theoretical perspectives of Donald Broadbent (1958) and Ulric Neisser (1967). Robert Gagné (1985) and Benjamin Bloom (1956) are also credited with

advances in cognitive perspectives on learning. Their contributions were discussed in the previous chapter on instructional design.

3.3.2.2 *Jean Piaget and Genetic Epistemology*

A cognitive theorist who influenced both the fields of psychology and education, Jean Piaget primarily researched the cognitive development of children and adolescents. His theory of *genetic epistemology* sought to explain the stages and processes of cognitive development from infancy to adulthood. A prolific writer, Piaget authored more than fifty books. Influenced by his early studies in biology, Piaget's theory had a strong biological and evolutionary perspective. According to von Glasersfeld (1997), Piaget essentially theorized that human development was a form of adaptation and that cognition was the highest form of this adaptation. He conceived of learning as an iterative cognitive process of assimilation (an attempt to integrate new information into existing cognitive structures) and accommodation (modifying existing cognitive structures based upon new information) always moving toward equilibration (a more sophisticated and satisfying mode of thought) (Piaget 1985).

Piaget's conception of cognitive structure is intimately linked to an understanding of the schemata utilized to interact with the environment (Leonard 2002:29). Piaget defined a schema as a "mental representation of an associated set of perceptions, ideas, and/or actions" (Bhattacharya and Han 2001). The concept of schemata was advanced by the work by British psychologist Frederic Bartlett (1932) in the early 1930s. Piaget argued that schemata are the building blocks of thinking. As organisms interact with the environment and develop, schemata are modified, enabling these organisms to deal with changes (Leonard 2002:29). Piaget envisioned five stages of development, which, unfortunately, end at age fifteen, rendering them less than helpful for this project. Perhaps the most important contribution Piaget made to learning theory is the suggestion that cognitive development involves assimilation, accommodation, and equilibration, and that these three contribute to the formation or modification of schemata in an effort to achieve some sense of balance in understanding the external world.

Interestingly, in spite of his major impact on the development of cognitivism, Piaget considered himself a constructivist (Driscoll 2005:191).

Jarvis, Holford, and Griffin (1998:30-31) noted that, after Piaget, developmental cognitive theorists tended to focus on the role of reflection and dialectic thought in learning and development, both of which are central to adult learning. Expanding upon the idea of developmental stages, Kohlberg (1986:34-35) suggested six stages of moral development (not related to age), and Fowler (1981) applied a similar approach to the development of religious faith.

3.3.2.3 David Ausubel and Meaningful Learning

An American psychologist and author, David Paul Ausubel is best known for his theory on meaningful and rote learning (Mintzes, Wandersee, and Novak 2005:39). According to Ausubel, meaningful learning takes place when and if learners actively interpret experiences using internal, cognitive structures (Driscoll 2000:116). He saw meaningful learning as a learner-driven process “in which new information is related to an existing relevant aspect of an individual’s knowledge structure” (Novak 2010:59). This learning contrasts directly with rote learning (verbatim memorization), in which the learner makes no effort to integrate new knowledge with existing knowledge (Novak 2010:60). Ausubel posited that the ability to recall knowledge was directly related to how meaningful the learning was, since meaningful learning anchors knowledge to cognitive structures (Novak 2010:66). For meaningful learning to occur, three criteria are required (Driscoll 2000:117-118, Novak 1993:4).

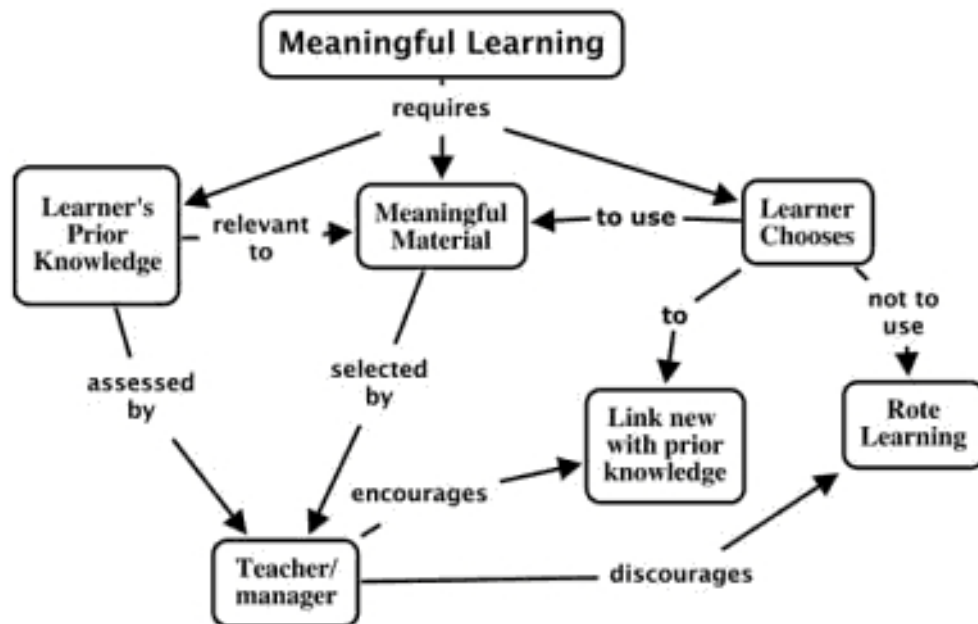
- The material to be learned must itself have potential meaning.
- The learner must possess relevant concepts and propositions that can serve to anchor the new learning and assimilate new ideas.
- The learner must choose to relate the new information to his/her cognitive structure in a non-verbatim, substantive fashion.

If even one of these elements is missing, then the likely result is rote learning. Rote learning yields isolated propositions in cognitive structure, resulting in “poor retention and retrieval of new ideas, potential interference in subsequent learning

of related concepts, and inability to use new knowledge to solve novel problems” (Mintzes et al. 2005:39).

Figure 3.1: Ausubel’s Process for Meaningful Learning

(Novak 2010:60)



Ausubel posited that new information can be added to cognitive structure in three ways (Driscoll 2000:120-123). In *subsumption*, new information is attached to existing anchoring ideas in a subordinate manner. Correlative subsumption, the most common way of learning, occurs when new information or experience elaborates, extends, or modifies an existing concept or proposition, altering the learner’s understanding in some way. Derivative subsumption occurs with the addition of new information that is merely illustrative of previously learned concepts. *Superordinate* learning, on the other hand, occurs when new ideas are synthesized, subsuming established ideas. This type of learning is often associated with insights such as those experienced in an “Aha!” moment. When new concepts or propositions have general relevance but are not directly relatable to existing anchoring ideas in cognitive structure, *combinatorial* learning is said to occur.

According to Ausubel, Novak, and Hanesian (1978:67-68),

The result of the interaction that takes place between the new material to be learned and the existing cognitive structure is an assimilation of old and new meanings to form a more highly differentiated cognitive structure.

Thus, Ausubel labeled these meaningful learning processes *assimilation theory*.

In his introduction to *Educational Psychology: A Cognitive View* (1978), Ausubel stated, “If I had to reduce all of educational psychology to just one principle, I would say this: The most important single factor influencing learning is what the learner already knows. Ascertain this and teach him accordingly” (Ausubel et al. 1978:vi).

3.3.2.4 Jerome Bruner and Categorization

A leading voice in the ‘cognitive revolution’, Jerome Bruner is a “contemporary, cognitive interactionist learning and developmental psychologist” who made significant contributions to education and curriculum theory (Bigge and Shermis 1999:133) and to the learning theories of cognitivism and constructivism (Ormrod 2011). In particular, he is renowned for his work with the 1960s MACOS (Man: A Course of Study) social studies program and his influential books *The Process of Education* (1960) and *Towards a Theory of Instruction* (1966). After the 1960s, Bruner shifted his focus away from cognitive development toward the role of culture and social context in education and learning (Smith 2002).

Bruner holds that a theory of human development should go hand-in-hand with a theory of instruction (Driscoll 2000:222). For Bruner (1961:23), the end focus of education is to help the learner become “an autonomous and self-propelled” thinker.

One of Bruner’s primary contributions to the development of cognitive learning theory is the concept of *categorization*, the means by which humans construct concepts and create mental models of their environment. According to Bruner, Goodnow, and Austin (1986:1), categorizing is an act of ‘invention’, in which

humans “render discriminably different things equivalent”, group objects and events into classes, and “respond to them in terms of their class membership rather than their uniqueness”. These categories interrelate through a coding system envisaged as hierarchical arrangements of related or interconnected categories, with generic categories at the top and increasingly specific categories below. Placement of an event or experience in a coding system enables a person to draw from related categories to generalize. This process is essential for effective transfer (LeFrancois 2006:199-200).

Bruner et al. (1986:2) observed that the learning and use of categories represents one of the most elementary forms of cognition by which humans engage with and adjust to their environment. What makes categories unique is that, once mastered, they can be used without further learning; and they can be used as a tool to aid in learning. For Bruner, the ability to understand categories and perceive the specific attributes that distinguish categories from one another is evidence of cognitive development.

Categorization helps reduce the complexity of the environment, enables humans to recognize objects and ideas never previously encountered, reduces the need for constant (repetitive) learning, and allows humans to order and relate objects or classes of events in a coded system of categories, rather than dealing with individual objects or events (Bruner et al. 1986:12-13). Bruner’s concepts of categorization and encoding have proven to be enduring. They continue to stimulate research to this day (LeFrancois 2006:201).

3.3.2.5 Information Processing Theory

Developed in the 1950s through 1970s, information processing theory views human learning in much the same way as a computer processes information. “When learning occurs, information is input from the environment, processed and stored in memory, and output in the form of some learned capability” (Driscoll 2000:76).

Information processing theory is actually a framework of theories sharing several core assumptions about how information is processed by the brain. Though

there is a certain amount of dispute concerning specifics, several elements of information processing theory are widely embraced among scholars (Lutz and Huitt 2003:2; Bisanz, Ho, Kachan, Rasmussen, and Sherman 2003:567-571). Adherents to information processing theory assume that cognitive activities involve mental processes operating in real time on internal, symbolic representations of information; and that these mental representations are coded with specific structural properties. Representations are stored by memory processes and retrieved to assist with the interpretation of new information. It is also assumed that these processes and representations exist within an organized cognitive architecture. Cognitive psychologists generally agree that there are limitations on the amount of information that can be encoded, stored, and retrieved at any given time. There is also general consensus that some type of control or processing system manages incoming stimuli.

In addition, it is commonly held that there is interaction between new information and information stored in long-term memory, and that this interaction is a fundamental part of learning. Cognitive psychologists acknowledge that humans have inherent genetic traits that influence how new information is gained and processed, and that cognitive development occurs as a result of self-modification of the information-processing system.

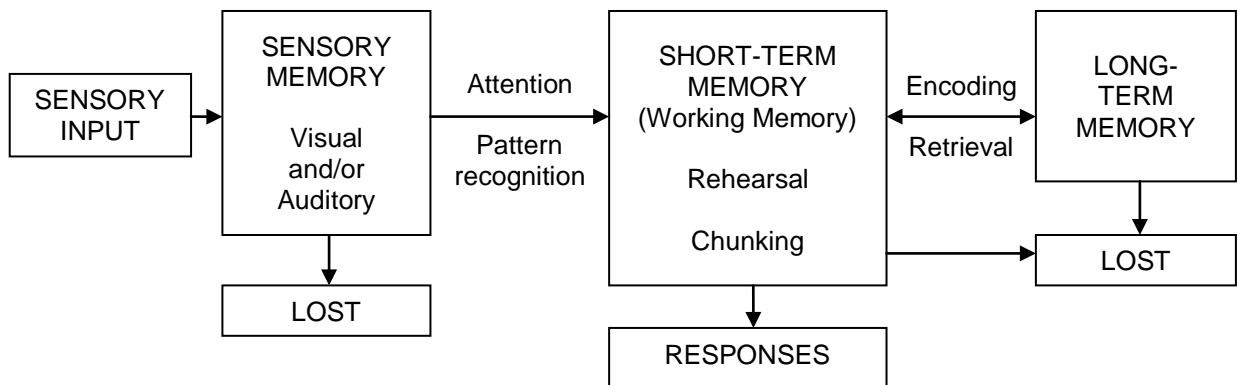
The most widely embraced information processing model is the 'stage theory' of memory proposed by Atkinson and Shiffrin (1968). According to this model, information is processed and stored in three stages: sensory memory, short-term (working) memory, and long-term memory. This three component model does not enjoy universal support (Ormrod 2000:235). J.R. Anderson (1995), Cowan (1995), and Crowder (1993) suggested that short-term/working memory and long-term memory merely represent different states of activation in a single memory. Whatever has our attention and is being processed is active; and the rest of the information stored in memory is inactive.

In the stage model, *sensory memory* is created when special sensory receptor cells (such as those associated with vision and hearing) transduce external energy in such a way that it can be processed by the brain, creating a memory. Sensory memory is very short, averaging less than half a second for vision; and

about three seconds for hearing (Lutz and Huitt 2003:3). Sensory memory is affected by ‘attention’ and ‘automaticity’. Attention, which is subject to the limitations of perceptual processing and response generation, occurs as humans endeavor to attend to one stimulus while seeking to ignore competing stimuli. Broadbent (1958) suggested an exclusive ‘all-or-nothing’ approach to attention; but as Treisman (1960:81) demonstrated, attention seems rather to attenuate (or tune out) stimulation that is not meaningful at the moment. In addition to meaningfulness (or relevance), attention is affected by similarity in competing ideas or stimuli, complexity of new information, and physical ability/disability. Automaticity occurs when tasks are over-learned or sources of information become habitual, minimizing attention requirements (Driscoll 2000:83). As Driscoll (2000:84) noted, the process by which environmental stimuli are recognized as “exemplars of concepts and principles already in memory” is pattern recognition. The matching of new stimuli to existing memory structures is critical to the acquisition of new knowledge. Only information brought into memory in a meaningful way will be stored as memory (Lutz and Huitt 2003:4).

Figure 3.2: The Stage Model

(adapted from Driscoll 2000:77)

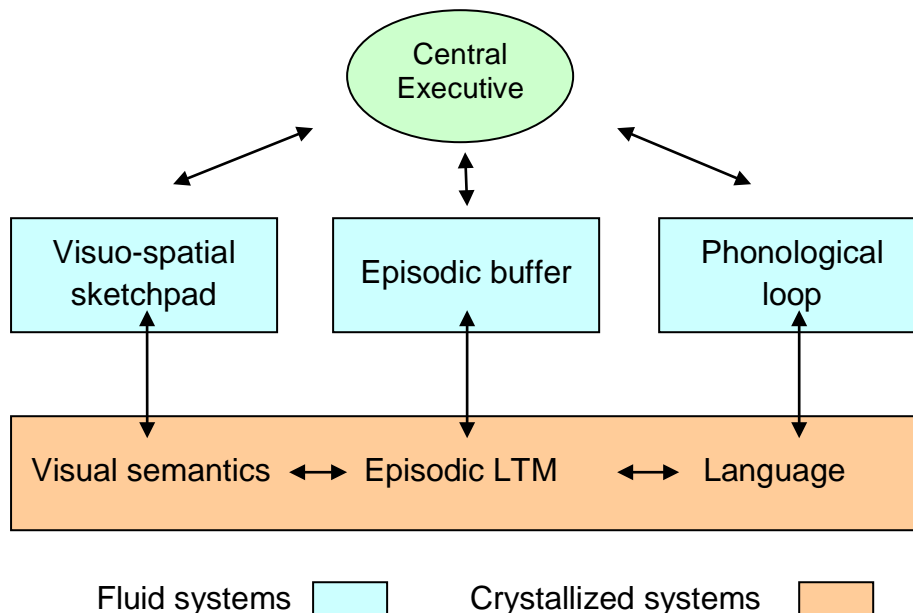


The second stage of information processing is *short-term memory* (working memory). It is this part of memory that actively processes new information received from the sensory memory. Lutz and Huitt (2003:4) noted that short-term memory has a limited capacity. Miller (1956:81-97) discovered that short-term memory can hold no more than five to nine ‘chunks’ of meaningful information at a time. Conveying important information in meaningful chunks actually increases the capacity of short-term memory. In addition, if action is not taken on new

information within 15-30 seconds, the information will be lost (Brown 1958; Peterson and Peterson 1959). The limited capacity of short-term memory and the concept of chunking have both become fundamental aspects of theory relating to memory and effective methods of instruction.

Figure 3.3: Baddeley's Model of Memory

(Baddeley 2001:93)



Illustrated in Figure 3.3, Baddeley (with Hitch in 1974) proposed a model of short-term/working memory that included a 'central executive', phonological loop, and visuo-spatial sketchpad, adding an episodic buffer in 2000 (Baddeley 2001:851-864). Each of these components has limited capacity. The central executive controls cognitively demanding tasks and functions in much the same way as attention. The phonological loop consists of an auditory store concerned primarily with speech perception and an articulatory process (inner voice) linked to speech production (Baddeley 1990). The visuo-spatial sketchpad is used for the storage and manipulation of spatial and visual information. Based on research evidence, Logie (1995) proposed that visuo-spatial working memory includes two components — a visual cache to store information such as form and color and an 'inner scribe', which deals with spatial information and rehearses and transfers information to the central executive. Logie's proposal was supported by Baddeley and Liberman (1980) and the brain-imaging data of Smith and Jonides (1997). Though poorly understood, the episodic buffer combines

information from the above components into a single representation. Added as a result of research findings (Baddeley 2000:417-423), the episodic buffer is the subject of on-going study.

When new information enters short-term (working) memory, *long-term memory* is activated in an effort to make sense of the new information (Driscoll 2000:88). Long-term memory is the storehouse for previously learned perceptions, experiences, knowledge, and information (Lutz and Huitt 2003:5). Interestingly, 'old' information in working memory tends to be replaced as new information comes in, either from sensory memory or from long-term memory. In order to prevent the loss of new information, it must be rehearsed and/or encoded.

Rehearsal entails repeating basic information, intentionally keeping it in short-term memory. However, rehearsal can also serve to reinforce information in long-term memory. Unfortunately, repetition of new information that is complex in nature is not enough to ensure that it remains in long-term memory. Information remains in long-term memory only when it is 'encoded'; and this occurs as it is meaningfully related to existing information already in long-term memory (Driscoll 2000:91). Encoding can happen in a number of ways. For example, research has demonstrated that categorization (Bousfield 1953), mnemonics and mediation (Matlin 1983), imagery (Kulhavy and Swenson 1975), self-questioning, and other forms of elaboration all assist with encoding.

Anderson and Bower (1974) offered a *propositional model of long-term memory* in which the basic unit is a 'proposition', a combination of concepts with both a subject and a predicate (Driscoll 2000:96). Anderson's ACT (adaptive control of thought) model has been through several incarnations (1976, 1983, 1996, 1997), reflecting the increase in knowledge on the neural structure of the brain. Now known as ACT-R, the theory has become increasingly complex and, thus, difficult to validate.

Parallel distributed processing models, also known as connectionist models, were developed by Rumelhart and McClelland (1986). These models propose that the building blocks of long-term memory are subsymbolic connections — simple connections that do not correspond to meaningful bits of information (Driscoll

2000:97). These connections form a network upon which processing takes place. Learning occurs as input activates the connections, strengthening some while weakening others, creating or modifying the patterns that represent concepts and knowledge. Since processing is parallel, many adjustments can occur at the same time.

Paivio (2006:3) proposed a dual code model of cognition (1969, 1971, 1986) involving two distinct subsystems, a verbal system for language and a nonverbal, imagery-based system for nonlinguistic objects and events. Each of these systems is assumed to be composed of internal representational units. Verbal representational units are called 'logogens' and nonverbal representational units 'imagens'. These units are activated when a person recognizes, manipulates, or thinks about something specific. The dual coding model holds that representations are connected to sensory input and response output systems and to each other. They can function independently or cooperatively to mediate nonverbal and verbal behavior. The variable pattern of the interplay between the two systems is what we know as 'cognition'. Providing evidential support, research by Anderson and Bower (1973) demonstrated that, in certain cases, memory was enhanced when relevant visual images and verbal images were linked. Baddeley's (1986) inclusion of visuo-spatial and phonological processing systems in his model of working memory dovetails with Paivio's dual code approach.

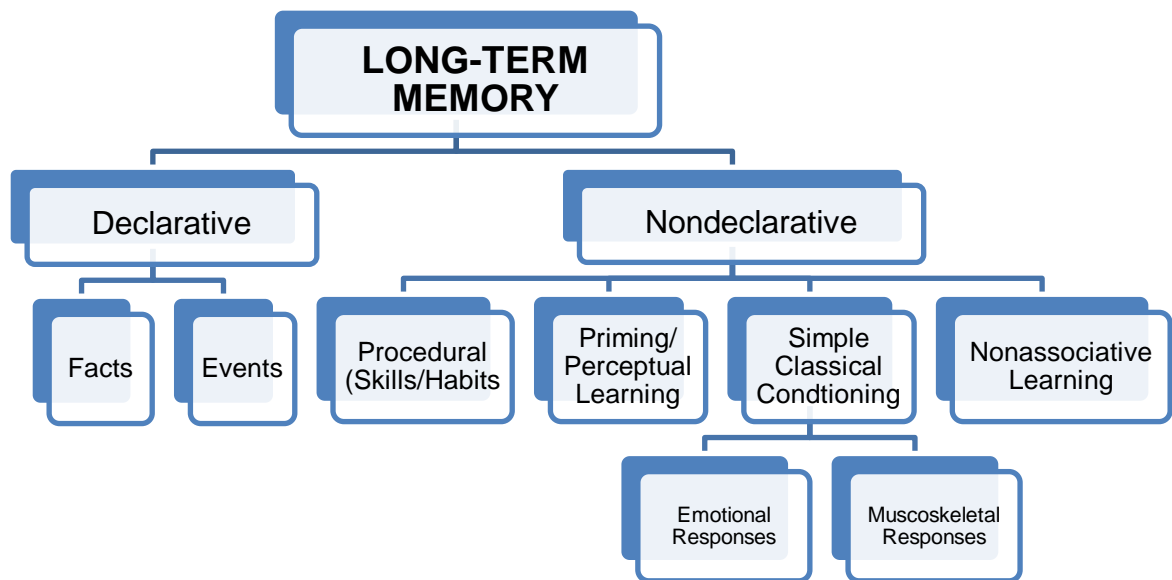
According to Howard-Jones (2010:7-8), cognitive neuroscience now accepts that humans have multiple memory systems, both declarative and nondeclarative, capable of operating both independently and in parallel with each other. Squire (2004:171-177) proposed such a taxonomy of long-term memory, backed by research on the brain, which includes separate categories of declarative and nondeclarative memory, both of which are further broken down into other categories or systems (see Figure 3.4 below).

Defined as the "capacity to consciously recall everyday facts and events", declarative memory equates to what most people refer to as 'memory' and is the primary area of interest in education (Howard-Jones 2010:7). Declarative memories are made up of both episodic and semantic memories (events and

facts). By nature, declarative memory is representational, providing the means to form a relatable model of the world and to compare remembered material. Nondeclarative memory, on the other hand, is expressed through performance rather than recollection and supports procedural learning (skills and habits), priming and perceptual learning, classical conditioning such as emotional and musculoskeletal responses, and nonassociative learning (Howard-Jones 2010:8).

Figure 3.4: Squire's Taxonomy of Long-term Memory

(Squire 2004:173)



Ormrod (2000:237-250) highlighted five cognitive strategies which can enhance the learning (encoding) of declarative knowledge.

Rehearsal, or the repeating of something over and over, will keep information active in working memory. However, unless this new information is connected in some way to knowledge already in long-term memory, rote learning is likely to occur. The learning will be tedious, relatively ineffective, and difficult to retrieve.

Meaningful learning takes place when the learner already has an appropriate knowledge base, is aware that the new information relates to previously learned knowledge, and recognizes a clear relationship between the new information and knowledge already stored in long-term memory. Meaningful learning is intentional; and it requires that the learner actively believe that they can make sense of new information. When learners recognize that new information can

help them better understand and relate to their world, they are more inclined to pursue meaningful learning.

Organization plays a crucial role in learning new knowledge. When information is organized, it is much easier to make connections among the various pieces of information. Trying to learn individual unrelated ‘facts’ is far more difficult than integrating ideas as part of a bigger picture. This strategy can be greatly enhanced by the effective presentation of material. Learners are more inclined to organize information if it aligns with an organizational structure with which they are familiar.

When knowledge already stored in long-term memory is used to expand a new idea, this is referred to as *elaboration*. Anderson (1995:197-202) noted that the more learners use what they already know to help understand, interpret, and apply new information, the more effectively it is stored in long-term memory. Teachers can play a helpful role by facilitating elaboration through questions, discussion, reflection, and other activities that encourage engagement with and application of new information in a meaningful way.

Visual imagery is also of assistance in learning declarative knowledge. Research has shown that the use of imagination, physical objects, pictures, charts, graphs, and other visual aids can be very helpful for encoding information into long-term memory (Sadoski and Paivio 2001).

It is not just storage of knowledge in long-term memory that is important. To be useful, information must also be retrieved. Ormrod (2000:252-257) highlighted four factors that enhance effective retrieval from long-term memory.

- Making multiple connections and creating many associations with existing knowledge
- Learning information to the point of mastery and automaticity
- Using knowledge frequently (reviewing/refreshing knowledge regularly)
- The use of relevant retrieval cues that trigger associations

Table 3.2: Five Ways of Learning Declarative Knowledge

(adapted from Ormrod 2000:238)

Process	Definition	Effectiveness	Implication
Rehearsal	Repeating information verbatim mentally or aloud	Relatively ineffective; storage is slow, retrieval is difficult	Suggest rehearsal only when other strategies are not possible
Meaningful learning	Making connections between new information and prior knowledge	Effective if associations made without prior knowledge are appropriate	Help learners understand new information in terms of what they already know
Organization	Making connections among various new pieces of information	Effective is organizational structure is legitimate and if it consists of more than a mere list of separate facts	Present information in an organized way, point out interrelationships and organizational structure
Elaboration	Adding additional ideas to new information based upon what is already known	Effective if added ideas are appropriate references	Encourage learners to think beyond the information itself to inferences and implications
Visual imagery	Forming a mental image of information	Varies by individual and specific example; especially beneficial when supplementing semantic encoding	Illustrate verbal instruction with visual materials

In spite of the popularity of the information processing model, it is not without critics. Hunt and Ellis (2004:12) are quick to point out the limitations of a mechanistic computer metaphor for explaining learning and humanity. Computers have no feelings, no real sense of understanding, and no consciousness. “Since the computer is not a biological entity and humans are, many important issues about the human mind may resist computer modeling” (Hunt and Ellis 2004:34). Echoing similar thoughts, Mayer (1996:158-159) pointed out that the information processing fails to acknowledge sufficiently that humans process information for a reason. In addition, he noted that it essentially ignores affective, social, and biological aspects of cognition, divorcing it from the reality of human life.

3.3.2.6 Contributions and Criticisms of Cognitivism

Cognitive learning theories emerged as psychologists increasingly rejected the behaviorist assumption that learning is a passive process of adaptation

determined by the environment. Instead, cognitivism emphasizes active mental processing on the part of the learner, with knowledge stored in an organized manner as symbolic mental constructs and learning occurring as knowledge is committed to memory. Cognitive learning theories have done much to promote an understanding of human cognition and learning. Nonetheless, cognitivism is not without criticism. As with behaviorism, knowledge in cognitivism is viewed as objective and absolute, something outside the learner. In addition, the information processing model has been faulted for being overly mechanistic and an inadequate representation of the complexity of human memory and learning. Moreover, the lack of consideration given to individual personalities, affective factors, and social influences is problematic.

3.3.3 Social Cognitive Theory/Social Learning Theory

As the name suggests, social learning theory, now referred to as social cognitive theory, focuses on learning that occurs within a social context. Social learning theory was pioneered in the nineteenth century by French social theorist Gabriel Tarde (1903,1969), who proposed his theory of imitation in an effort to explain the development of deviance in adolescents. Expanding upon imitation theory, Miller and Dollard (1941) released *Social Learning and Imitation*, in which they proposed that individuals who are motivated to learn a specific behavior would learn that behavior through the observation of others, imitation of their actions, and the subsequent reinforcement resulting from their actions. In short, social learning and imitation theory suggested that people obtain ‘competencies’ and new modes of behavior through ‘response consequences’ (Miller and Dollard 1941:26-42). Miller and Dollard acknowledged the role of imitation in learning, but saw it only in the context of instrumental conditioning, with “social cues serving as discriminative stimuli and behavioral matches to those cues being reinforced” (Grusec 1992:6).

Twenty years later, Albert Bandura, professor of psychology at Stanford University and a behaviorist by training, came to realize that behaviorism could not offer an adequate explanation of human behavioral change and conducted a series of experiments based “on the assumption that human development

requires a much more powerful mode of transmitting competencies than does trial and error” (Evans 1989:4). In his famous Bobo doll experiments (1961, 1963), Bandura (and his assistant Walter) demonstrated that children exposed to aggressive behavior by an adult model are likely to emulate that behavior. Conflicting somewhat with the conclusions of Miller and Dollard, Bandura’s experiments demonstrated that attitudes and behaviors may be adopted by observers without any form of reinforcement. His findings also suggested that people learn (acquire new behaviors) by observing the attitudes and actions of others and the apparent responses received by that person from the social and physical environment (Grusec 1992:781). Labeled ‘observational learning’, Bandura offered this as a far more sensible learning mechanism and technique of behavior change (Grusec 1992: 781). Bandura (1977:22) asserted,

Learning would be exceedingly laborious, not to mention hazardous, if people had to rely solely on the effects of their own actions to inform them what to do. Fortunately, most human behavior is learned observationally through modeling; from observing others one forms an idea of how new behaviors are performed, and on later occasions this coded information serves as a guide for action.

Drawing from both behavioral and cognitive perspectives on learning and based upon research, Bandura published a framework for understanding human behavior called *social cognitive theory*. According to Grusec (1992:781), Bandura’s theory is primarily concerned with how people “operate cognitively on their social experiences” and, in turn, how these cognitive operations influence behavior and development. Through abstracted and integrated information gleaned from social experiences, people “mentally represent their environments and themselves in terms of certain crucial classes of cognitions”, including response-outcome expectancies, perceptions of self-efficacy, and standards for evaluative self-reactions, influencing both how they respond to environmental stimuli and the types of environments they actively seek (Grusec 1992:781).

Bandura (1986:25) observed that what people “think, believe, and feel” directly affects their behavior, and that the “natural and extrinsic effects” of their behavior

have a reciprocal influence on their “thought patterns and affective reactions”. Bandura’s research led to the publication of *Social Learning Theory* (1976), which analyzed human learning and self-regulation in terms of the “triadic reciprocal causations” evident in this interplay among personal (cognitive-affective), behavioral, and environmental determinants (Zimmerman and Schunk 2003:438). In this model of reciprocal causation, behavior, cognition, and environmental influences all serve as interacting determinants, influencing each other bidirectionally but not necessarily equally (Bandura 1989:2-3). As Grusec (1992:781) expounded, expectations, self-perceptions, goals, and physical structures direct behavior, the outcomes of which impact on cognition and biological properties. Environmental events (such as modeling, instruction, and social persuasion) affect the person and, in turn, the person evokes varying responses from the environment. The person’s behavior affects the environment and the behavior is then subject to modification by that environment. This three-way interplay between cognitive/personal factors, behavior, and the environment is the core of social cognitive theory.

Bandura (1977:24-28) formulated his findings on observational learning into a four-step pattern which combines a cognitive view and an operant view of learning. Huitt (2004) described these accordingly.

- 1) “Attention — the individual notices something in the environment.”
- 2) “Retention — the individual remembers what was noticed.”
- 3) “Reproduction — the individual produces an action that is a copy of what was noticed.”
- 4) “Motivation — the environment delivers a consequence that changes the probability the behavior will be emitted again (reinforcement and punishment).”

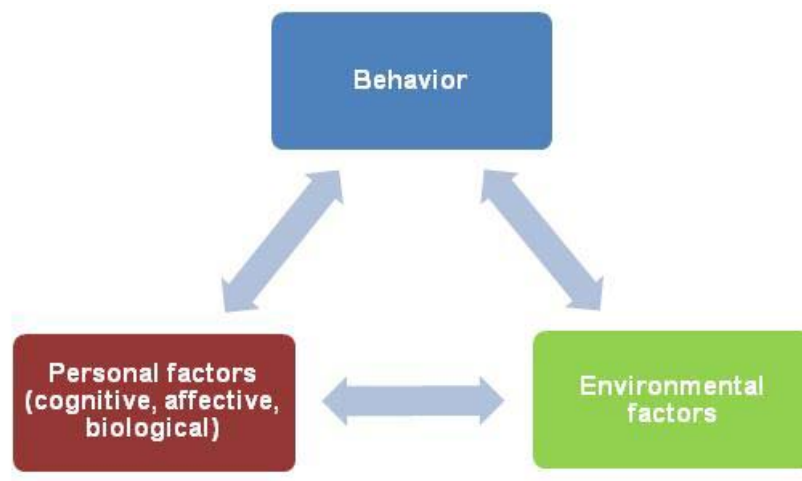
Ormrod (2000:436-438) summarized the main principles of social learning theory as follows.

- “People learn by observing others.”
- “Learning is an internal process that may or may not change behavior.”

- “People behave in certain ways to reach goals.”
- “Behavior is self-directed (as opposed to the behaviorist thought that behavior is determined by environment).”
- “Reinforcement and punishment have unpredictable and indirect effects on both behavior and learning.”

Figure 3.5: The Triadic Reciprocity of Social Cognitive Theory

(adapted from Pajares 2002)



In addition to social learning, Bandura has also devoted considerable effort to researching self-efficacy; and this eventually became his primary focus. Self-efficacy is an underlying belief that one is able to execute specific behaviors successfully. Research has demonstrated that a person's sense of self-efficacy has a direct bearing on choice of activities, effort, persistence, and learning and achievement (Zimmerman, Bandura, and Martinez-Pons 1992). Perceptions of self-efficacy are influenced by previous incidents of success and failure, subtle and overt messages from others, and the successes and failures of others with whom we identify (Ormrod 2000: 450-452).

Bandura continued to advance his theory and findings through articles and books, the most comprehensive being *Social Foundations of Thought & Action, a Social Cognitive Theory* (1986).

“Strategies consistent with social learning theories include mentoring, apprenticeship, on the job training, and internships” (Ross-Gordon 1998:217), all of which include aspects of modeling. As Ormrod (2000:444-449) noted, in observational learning, a person acquires or modifies a behavior demonstrated by another person — a model. When a person observes a model being reinforced for a particular behavior, that behavioral tendency may well be strengthened in the observer. The opposite is also true. When a model is seemingly punished for a particular behavior, the observer may be less likely to emulate that behavior. Bandura (1986) identified several characteristics that increase the influence of a model. These include competence/excellence, prestige and power, behavior that is considered ‘gender appropriate’ (although models can change these perceptions), and relevance to the observer’s own situation.

Social cognitive theory recognizes the importance of the interplay between personal factors associated with the learner (expectations, goals, self-efficacy) and environmental factors in learning and the development of behavior. Learning is enhanced in a social environment that is conducive to learning. Teachers and facilitators can play an important role in the learning process by creating a positive learning environment, modeling desired behavior, and encouraging the development of self-efficacy through affirmation, exposure to relatable peer models, and the facilitation of repeated small successes.

3.3.4 Andragogy

Though ‘coined’ in 1833 by German teacher Alexander Kapp (Reischmann 2004:1), mentioned by Lindeman (Lindeman 1926a), and utilized by a few European educators (Nottingham Andragogy Group 1983:v), the term *andragogy* is generally associated with the theory of adult learning promulgated by American educator Malcolm Knowles. A subject of considerable debate over the past thirty years, the concept of ‘andragogy’ was born out of the belief that adults learn differently from children.

As Henschke and Cooper (2006:1) commented, the word ‘andragogy’ has been variously employed as a label for adult education and learning, a descriptive term

for different strategies and methods in adult learning, a set of mechanical tools and techniques for teaching adults, and even as a scientific discipline that focuses on processes that move people toward a full sense of 'humaneness'. In its most common usage, however, andragogy refers to a theory centered in "research and practice on how adults learn, how they need to be taught, and elements to be considered when adults learn in various situations and contexts" (Henschke and Cooper 2006:1). Reflecting a similar perspective on andragogy, Brookfield (1991:90) noted,

To some it is an empirical descriptor of adult learning styles, to others it is a conceptual anchor from which a set of appropriately 'adult' teaching behaviors can be derived, and to still others it serves as an exhortatory, prescriptive rallying cry....

Brookfield (1991:90) went on to state that for many educators and trainers of adults, andragogy has become more than a theory or set of principles. For 'andragogues', those who believe that their practice exemplifies andragogical principles and that the concept represents a professionally accurate summary of the unique characteristics of adult education practice, andragogy has become a badge of identity.

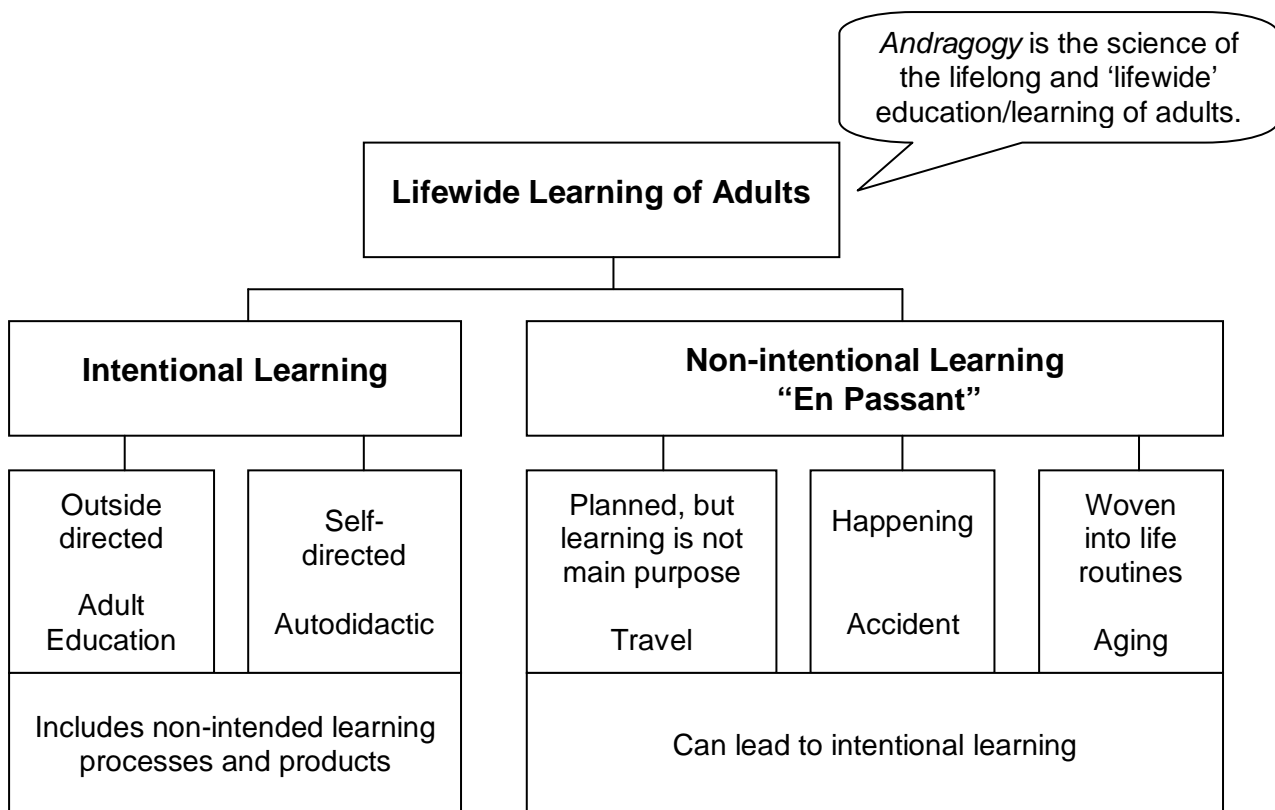
Derived from the Greek root 'andr' meaning 'man' and 'agogos' meaning 'leading' (Davenport 1993:114), andragogy was described by Knowles as "the art and science of helping adults learn" (Knowles 1980:43). From Knowles' perspective, andragogy contrasts with 'pedagogy', the art and science of teaching or leading children (Knowles 1980:43).

Though the term is most often associated with Knowles, alternative definitions of andragogy have been offered by others in the adult learning field. German scholar Jost Reischmann defined andragogy as an "academic discipline that reflects and researches the education and learning of adults", thus differentiating andragogy from the "field of practice (adult education)" (Reischmann 2000). Reischmann (2000), whose understanding of andragogy is illustrated in Figure 3.6, further explains,

In our understanding ‘andragogy’ comprises the ‘lifewide learning’ of adults. This understanding includes not only institutionalized forms of learning, but also self-directed and even partly-intentional or non-intentional forms of learning.

Figure 3.6: Reischmann’s Structural Scheme of Adult Learning

(Reischmann 2000)



3.3.4.1 Origins of Andragogy

Some scholars have argued that concepts associated with the modern understanding of andragogy were modeled in ancient cultures. Writing for the journal *Religious Education*, Malcolm Knowles (1977:201-202) traced the ideals of andragogy back to early teachers of adults such as Confucius, the Hebrew prophets, Jesus, Greek teachers such as Socrates, Plato, and Aristotle, and Romans teachers such as Quintillium, Cicero, and Euclid. Knowles claimed that because these great historical teachers all taught adults, they developed a set of assumptions about how adults learn. Unfortunately, these assumptions were

eventually replaced by a different set of assumptions in the middle ages; and it is these that came to dominate conventional modern education. Unlike many educators in the twentieth century, these ancient teachers saw learning as a process of enquiry and dialogue in which the learner had an active and primary role, with the teacher serving as a guide, facilitator, and occasional resource. Endorsing Knowles' perspective, Henschke (1998:4-7), who has a background in biblical studies, found fascinating similarities to andragogical principles in both the Hebrew and Greek cultures of the biblical era, as well as in the teaching style of Jesus.

Offering yet another perspective, Russian scholar Serguey Zmeyov (1998:106) described andragogy as a “theory of adult learning that sets out the scientific fundamentals of the activities of learners and teachers in planning, realizing, evaluating and correcting adult learning”. Taking an even ‘higher’ view, Henschke (1988), who studied under Knowles, defined andragogy as

a scientific discipline for the study of the theory, processes, technology, and anything else of value and benefit including learning, teaching, instructing, guiding, leading, and modeling/exemplifying a way of life, which would bring adults to their full degree of humaneness.

Considered by most scholars the father of andragogy in America, Malcolm Knowles was a leading figure in adult education in the United States during the second half of the twentieth century. After graduating from Harvard in 1934, Knowles was employed by the National Youth Administration in a skills development program targeting unemployed young adults. At this time, he came under the mentoring influence of Eduard Lindeman, social worker, philosopher, teacher, and author of *The Meaning of Adult Education* (1926b). Knowles was so impressed by Lindeman's philosophy and role model that he regarded him as a “prophet of modern adult educational theory” and a chief source of inspiration and ideas (Knowles 1989:8).

Lindeman himself was heavily influenced by his friend and colleague John Dewey, with whom he apparently shared “a concern for social justice, a belief in the possibilities of education and human action, and a deep commitment to

democracy” (Smith 2004). *The Meaning of Adult Education* carries the imprint of Dewey’s educational pragmatism, as well as his concerns with ‘emancipation’ and the ‘broadening of experience’. Adult education as articulated by Eduard Lindeman was essentially derived from Dewey’s perspectives on progressive education (Stewart 1987:4).

In the introduction to *The Meaning of Adult Education*, Lindeman (1926b:4-7) expounded a view of education radically different from the ‘mechanistic’ practices of that period.

A fresh hope is astir. From many quarters comes the call to a new kind of education with its initial assumption affirming that *education is life* – not merely preparation for an unknown kind of future living.... The whole of life is learning, therefore education can have no endings. This new venture is called *adult education* not because it is confined to adults but because adulthood, maturity, defines its limits....

Secondly, education conceived as a process coterminous with life revolves about *non-vocational* ideals. In this world of specialists, everyone will of necessity learn to do his work, and if education of any variety can assist in this and in the further end of helping the worker to see the meaning of his labor, it will be education of a high order. But adult education more accurately defined begins where vocational education leaves off. Its purpose is to put meaning into the whole of life.

Thirdly, the approach to adult education will be via the route of *situations*, not subjects. Our academic system has grown in reverse order; subjects and teachers constitute the starting-point, students are secondary. In conventional education the student is required to adjust himself to an established curriculum; in adult education the curriculum is built around the student’s needs and interests....

In the fourth place, the resource of highest value in adult education is the *learner’s experience*. If education is life, then life is also education. Too much of learning consists of vicarious substitution of

someone else's experience and knowledge. Psychology is teaching us, however, that we learn what we do, and that therefore all genuine education will keep doing and thinking together.

Authoritative teaching, examinations which preclude original thinking, rigid pedagogical formulae – all of these have no place in adult education. 'Friends educating each other....' Small groups of aspiring adults who desire to keep their minds fresh and vigorous; who begin to learn by confronting pertinent situations; who dig down into the reservoirs of their experience before resorting to texts and secondary facts; who are led in the discussion by teachers who are also searchers after wisdom and not oracles: this constitutes the setting for adult education, the modern quest for life's meaning.

Like Dewey, Lindeman (1951:129) linked adult education to democratic advancement and progressive social action, especially at community level.

Knowles continued his studies at the University of Chicago and came under the influence of Carl Rogers and his theories concerning experiential learning and the role of facilitation in adult learning. This, combined with a seminar on group counseling under Rogers' colleague Arthur Shedlin, left a lasting impression on Knowles, forever altering Knowles' perception of the role of an adult educator (Knowles 1989:14).

After receiving his MA in 1949, Knowles published *Informal Adult Education* and was subsequently appointed executive director of the Adult Education Association in the United States. Knowles went on to complete a PhD at the University of Chicago and published the first history of the adult education movement in the USA in 1962. From 1959 to 1974, he served as a professor of adult education at Boston University. During this period, he authored *The Modern Practice of Adult Education* (1970) and *The Adult Learner* (1973), popularizing the concept of 'andragogy' and placing him at the center of discussion on adult education in America. After some frustration at Boston University, Knowles joined the faculty of the North Carolina State University in 1974. As Knowles (1989:21) highlighted in his autobiography, he was granted freedom to develop courses based upon his andragogical model. He also

published *Self Directed Learning* the following year (1975). After 'retiring' in 1979, Knowles remained active in adult education, consulting, running workshops, writing articles for adult education journals, and authoring works such as *The Modern Practice of Adult Education: From Pedagogy to Andragogy* (1980 — second edition), *Andragogy in Action* (1984) and *The Adult Learner: A Neglected Species* (1990).

3.3.4.2 Knowles' Concept of Andragogy

Knowles presupposed that adults learn best through educational processes that recognize and embrace the differences between adults and children. Andragogy, as conceived by Knowles, represented an attempt to formulate a theory or model of adult learning anchored in the unique characteristics of adult learners. Concerning the criteria by which one is considered an 'adult' for learning purposes, Knowles held that "the psychological definition of adulthood is the point at which individuals perceive themselves to be essentially self-directing" (Knowles 1980:46).

As mentioned previously, Knowles eventually settled on six assumptions about adult learners, which he believed were foundational for effective adult learning (Knowles 1990:57-63).

- (1) *The need to know.* Adults have a need to know why something must be learned before they are willing to exercise the effort to learn it. Referring to Tough's (1979) research on adult learning, Knowles commented that adults tend to invest considerable time and energy investigating the 'pros' and 'cons' of any potential learning opportunity. As such, one of the most important tasks of an adult learning facilitator is to help the learners become aware of the 'need to know'.
- (2) *The learner's self-concept.* Since most adults have a self-concept of responsibility for their own lives, they tend to resist situations in which the will of others is thrust upon them, preferring rather to be treated as capable of self-direction. However, upon entering the learning environment, many adults fall back into a state of dependency characteristic of child learners.

The adult educator has a responsibility to facilitate a transition from dependency to self-direction in learning.

- (3) *The role of the learners' experience.* Adults bring a great volume, variety, and quality of experience into a learning environment. In many situations, the adult learners themselves can become the richest learning resource. Experiential learning methods that tap into the experience of learners are of critical importance. In addition, the unique experience of each adult learner emphasizes the need for individualization of learning and teaching strategies whenever possible. Unfortunately, this unique accumulated experience also has a potential downside. People often develop habits, biases, and presuppositions that can hinder the learning of new ideas.
- (4) *Readiness to learn.* Adults are usually ready to learn knowledge and skills needed to cope effectively with real-life situations. Readiness to learn is especially prominent when people move from one developmental stage to another.
- (5) *Orientation to learning.* Unlike the subject-centered orientation to learning so common in children's education, adults have a 'life-centered', task-centered, problem-centered orientation to learning. Adults are far more motivated to learn something that will help them perform tasks or deal with situations in the context of real life.
- (6) *Motivation.* Adults tend to respond more enthusiastically to internal motivators than external motivators. However, as Tough (1979) discovered, motivation can be blocked by a negative self-concept, inaccessibility of opportunities or resources, constraints on time, and learning programs that ignore principles of adult learning.

Knowles drew from these assumptions a number of implications for the design, implementation, and evaluation of adult learning activities (Merriam, Caffarella, and Baumgartner 2007:85). Table 3.3 summarizes the differences between adult and child learners and the implications these have for the design of instruction.

Table 3.3: Andragogy: Assumptions and Design Implications

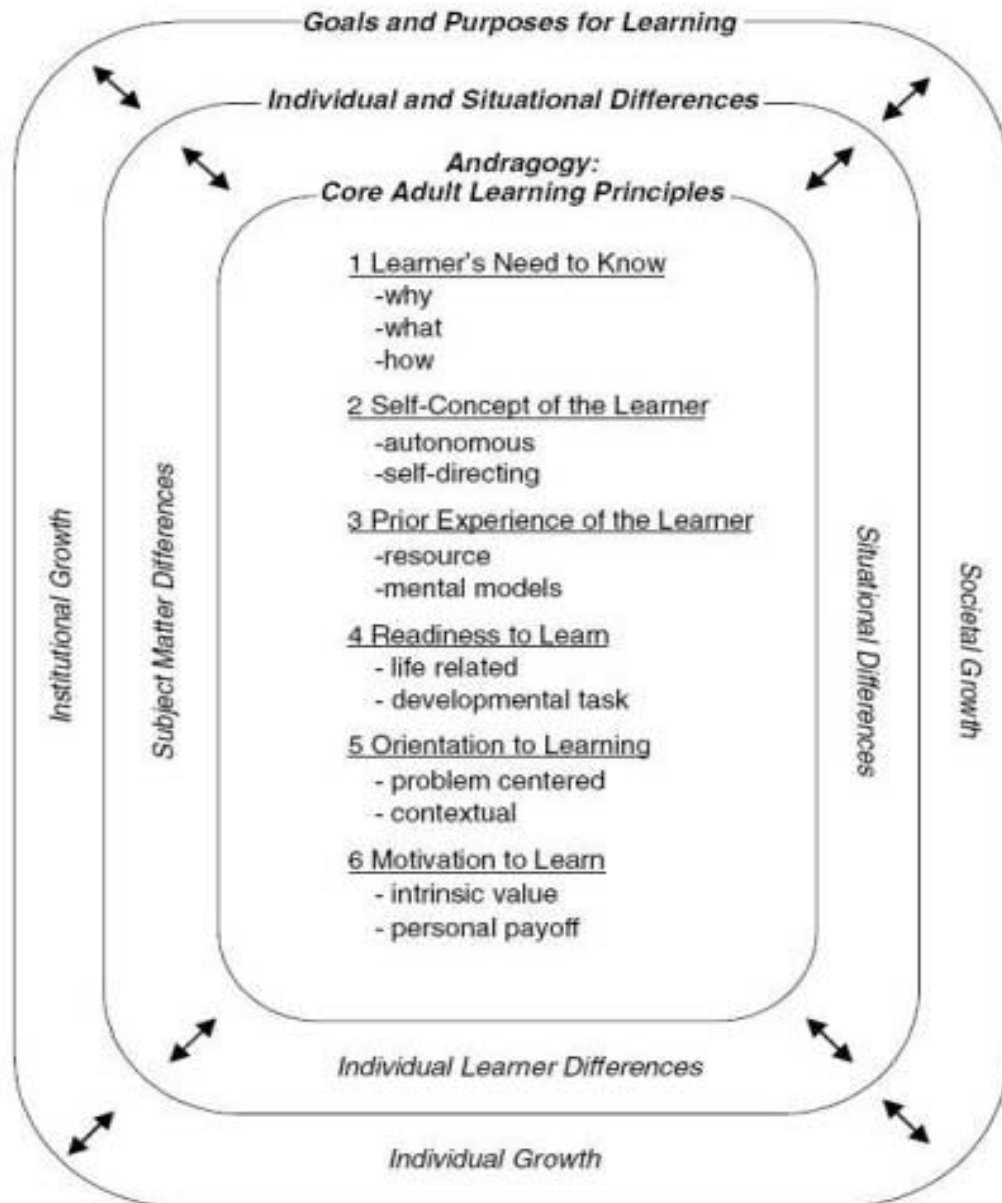
(adapted from Knowles 1977:211, 1990:78-83)

Assumptions			Design Elements		
Characteristics	Pedagogy	Andragogy	Element	Pedagogy	Andragogy
Self-Concept	Dependency	Increasing self-direction	Climate	Authority-oriented Formal Competitive	Mutuality Respectful Collaborative
Experience	Of little worth	Learners are a rich resource for learning	Planning	By teacher	Mechanism for mutual planning
Readiness	Biological development Social pressure	Developmental tasks of social roles	Diagnosis of Needs	By teacher	Mutual self-diagnosis
Time Perspective	Postponed application	Immediacy of application	Formulation of Objectives	By teacher	Mutual negotiation
Orientation to Learning	Subject centered	Problem centered	Design	Content units Logic of the subject matter	Problem units Sequenced in terms of readiness
Motivation	Primarily external	Partially external, but primarily intrinsic	Activities	Transmittal techniques	Experiential techniques (inquiry)
			Evaluation	By teacher	Mutual re-diagnosis of needs Mutual measurement

“Probably the best known set of principles or assumptions to guide adult learning practice, andragogy actually tells us more about the characteristics of adult learners than about learning itself” (Merriam et al. 2007:75). Though Knowles originally assumed these differences to be somewhat exclusive and absolute, he gradually softened his perspective and eventually came to view andragogy as “another model of assumptions about learners to be used alongside the pedagogical model of assumptions”, thus providing two alternative models at opposite ends of a sliding scale for testing assumptions for their ‘fit’ in particular situations (Knowles 1980:43).

Figure 3.7: Andragogy in Practice

(Knowles, Holton, and Swanson 1998:4)



It was out of the core principles that Knowles sought to develop the *practice* of andragogy (Knowles et al. 1998:180-183), a model of which is illustrated in Figure 3.7. Knowles (1984:418) noted that andragogy is by design a flexible “system of elements that can be adopted in whole or in part”. The core principles provide a sound platform for the planning of adult learning. With these as a base, analysis is undertaken to understand the specific characteristics of the adult learners, the subject matter, and the learning context. This analysis assists the

facilitator to apply each of the core adult learning principles in an appropriate manner. Application of the core principles is then further shaped by the goals and purposes of the adult learning experience and the level of application.

2.3.4.3 Criticisms of Knowles' Andragogy

Andragogy, as described by Knowles, is not without its critics. Davenport and Davenport (1985:187) highlighted the confusion and controversy surrounding andragogy, noting that it has been variously referred to as “a theory of adult education, a theory of adult learning, a theory of technology of adult education, a method of adult education, a technique of adult education, and a set of assumptions”. Hartree (1984) commented that Knowles' work created three problems — a confusion as to whether andragogy is a theory of teaching or of learning, a confusion over the relationship between adult and child learning, and ambiguity as to whether andragogy primarily concerns theory or practice.

Elias (1979) questioned if andragogy could even be considered a theory. Davenport and Davenport (1985) called for empirical studies to validate its claims. Acknowledging its popular acceptance among adult educators, Jarvis commented that though this theory holds “the status of an established doctrine in adult education”, it lacks “sufficient empirical research to justify its dominant position” (Jarvis 1984:32). Brookfield (1991:91) commented that Knowles does not present andragogy as an “empirically based theory of learning painstakingly derived from a series of experiments” from which generalizations of increasing sophistication and applicability can be drawn. From his perspective, one simply cannot build such a “theoretical edifice concerning the nature of adult learning” on a set of empirically unproven assumptions. Merriam also pointed out that controversy still remains as to whether Knowles' six core principles can be applied only to adults or even to all adults (Merriam 2001:5).

In spite of the criticism, Merriam acknowledged that andragogy and self-direction still stand as the two main pillars of adult learning. Perhaps in response to the criticism, in his autobiographical work, *The Making of an Adult Educator*, Knowles (1989:112) seems to have conceded, referring to andragogy as “a model of

assumptions about learning” or “a conceptual framework that serves as a basis for an emergent theory”.

On the positive side, Knowles andragogy provided a unifying idea and identity for an emerging group of adult educators. His work created an awareness of the uniqueness of adult learners, strengthened access to adult education through his publications, theories, and research, and inspired many who went on to become academic researchers, scholars, and practitioners in the fields of adult learning and education (Cooper and Henschke 2003).

3.3.5 *Experiential Learning*

Over the past seventy-five years, numerous scholars involved in adult education have highlighted the essential role of experience in adult learning. While discussing the need for a new approach to education in *Education and Experience*, John Dewey (1938:25) commented, “I assume that amid all the uncertainties, there is one permanent frame of reference: namely, the organic connection between education and personal experience....” However, Dewey (1938:25, 27) also noted that not all experiences are genuinely or equally educative and that the *quality* of the experience is important.

For authentic, positive learning to occur, Dewey (1938:27, 42) proposed that two principles had to be in effect — the past-future continuity of experience and interaction between the internal conditions of the learner and the objective conditions of the environment. Dewey criticized the traditional educational practices of his day because he felt they were weighted toward objective, externally controlled experiences that failed to respect the internal conditions and past experiences of learners, potentially compromising the effectiveness of learning.

Inspired by the experiential aspects of Dewey’s philosophical pragmatism, as well as Kurt Lewin’s action research and Piaget’s cognitive-developmental genetic epistemology, David Kolb and Roger Fry (1975) developed *experiential learning theory* (ELT) as a “holistic model of the learning process” and a “multilinear model of adult development”, consistent with how people learn, grow, and develop (Kolb

1984:4-12; Kolb, Koyatzis, and Mainemelis 2001:193). Kolb employed this specific name to emphasize the key role that experience plays in the learning process and to distinguish it from other learning theories such as behaviorism and cognitivism.

Focusing on the transaction between the internal characteristics of the learner and the external circumstances in the environment (and, in particular, between personal knowledge and social knowledge), experiential learning theory describes learning as “the process whereby knowledge is created through the transformation of experience”, “shaping and actualizing” the potential for development (Kolb 1984:41). Kolb viewed learning primarily as a social process in which the development of the individual is influenced by the social knowledge of a cultural system (Kolb 1984:133).

Sheckley (2006) noted that research on the human brain tends to support the role of experience in the establishment of durable and retrievable memory traces and subsequent integration of these traces into networks. From Sheckley’s perspective, all learning could be seen as ‘experiential’ since experience is prerequisite for the formation of enduring and retrievable memory traces. Lending weight to the role of experience in learning, Gerald Edelman, director of the Neurosciences Institute, strongly maintains that ‘doing’ is a prerequisite of understanding (Edelman and Tononi 2000: 207).

Experiential learning theory centers around six propositions (Kolb 1984:25-38).

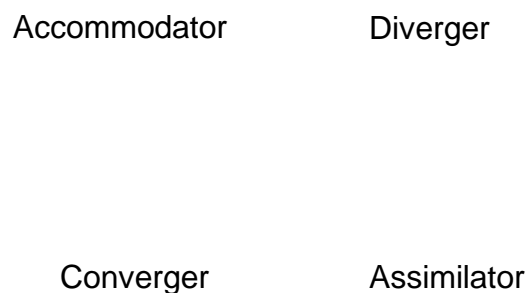
- “Learning is best conceived as a process, not in terms of outcomes.”
- “Learning is a continuous process grounded in experience.”
- “Learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world.”
- “Learning is a holistic process of adaptation to the world.”
- “Learning involves transactions between the person and the environment.”
- “Learning is the process of creating knowledge.”

3.3.5.1 Kolb's *Experiential Learning Cycle*

Inspired by the action research model of Kurt Lewin (1946), Kolb developed a model that describes the cycle of experiential learning as a four-stage process involving four adaptive learning modes: concrete experience, observation and reflection on the experience, abstract conceptualization based upon the reflection, and active experimentation that tests the new concepts (Kolb 1984:20-38). According to Kolb and Kolb (2008:5), experiential learning occurs as knowledge is constructed out of the creative tension among these four learning modes in response to contextual demands. The most effective learning takes place when all four learning modes are involved. This cycle is not seen as a singular event but rather a repetitive cycle or spiral. Though the cycle can begin at any stage, the most common starting point is concrete experience.

Figure 3.8: Experiential Learning Cycle and Learning Styles

(adapted from Kolb 1984)



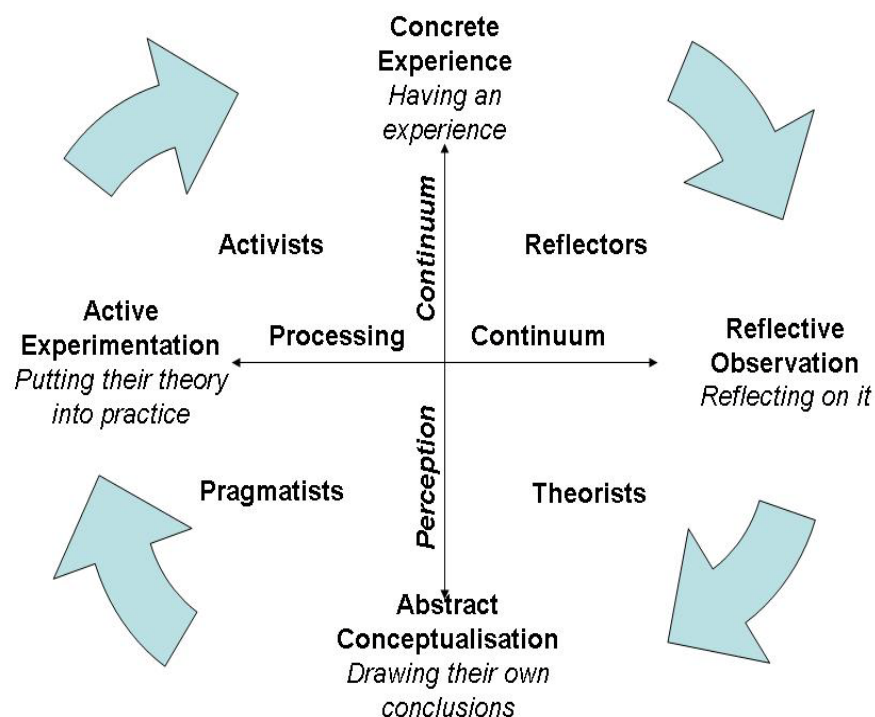
Illustrated in Figure 3.8, the experiential model of learning developed by Kolb and Fry (1975, 1984) is based upon the premise that learning preferences can be described using two dialectical continuums on perpendicular axes — ‘perception’ on the vertical axis and ‘processing’ on the horizontal axis. At opposite ends of

the perception continuum are *concrete experience* (feeling) and *abstract conceptualization* (thinking). At opposite ends of the processing continuum are *active experimentation* (doing) and *reflective observation* (watching).

Kolb portrayed the experiential learning process as “an idealized learning cycle or spiral where the learner ‘touches all the bases’ — experiencing, reflecting, thinking, and acting — in a recursive process that is responsive to the learning situation and what is being learned” (Kolb and Kolb 2008:5). In this ideal cycle, concrete experiences serve as a basis for observations and reflections, which, in turn, are assimilated and processed into abstract concepts that can be tested through active experimentation. This action then serves as a guide in the creation of new experiences. Experiential learning theory proposes that learning is *the* major determinant of human development, and that *how* individuals learn has a major influence on the nature and direction of their personal development (Kolb and Kolb 2008:9).

Figure 3.9: The Honey and Mumford Experiential Learning Cycle

(Clark 2011b)



3.3.5.2 The Modified Experiential Learning Cycle of Honey and Mumford

As illustrated in Figure 3.9, Peter Honey and Alan Mumford (1982, 1983) modified Kolb's experiential learning model in the mid 1970s for use in business management. The stages in the learning cycle were renamed to better align with the experiences of managers in decision making and problem solving. The modified stages include 'having an experience', 'reviewing the experience', 'drawing conclusions from the experience' (theorizing), and 'putting the theory into practice' (planning the next steps).

3.3.5.3 The Learning Model Proposed by Jarvis

Dissatisfied with the limitations of Kolb's model, Peter Jarvis (1987) also conducted research on experiential learning. Working with adult learners, Jarvis asked them to explore Kolb's experiential learning cycle based on their own experience of learning. Jarvis then developed a model that traced the various results gleaned from these adult learners.

Figure 3.10: Jarvis' Learning Model

(Jarvis, Holford, and Griffin 1998:49)

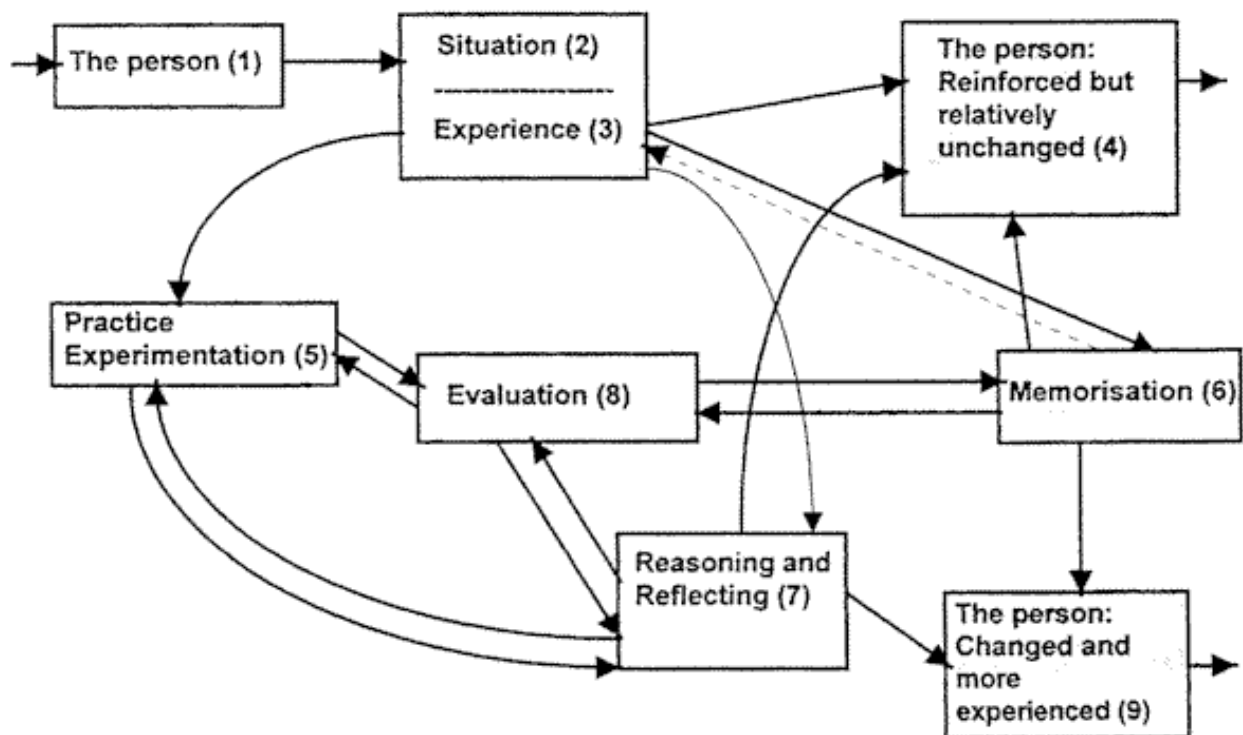


Table 3.4: Jarvis' Typology of Experiential Learning

(adapted from Jarvis, Holford, and Griffin 1998:50-55)

Category of response or experience	Type of learning/non-learning	Explanation
Non-learning: experience does not result in learning	Presumption	Patterned behavior typical of everyday experience (Boxes 1-2-3-4)
	Non-consideration	No response to a potential learning experience (Boxes 1-2-3-4)
	Rejection	Refusal to learn from a new experience (Boxes 1-2-3-7-9 or 4)
Non-reflective learning: learning takes place without reflection, does not challenge social norms and structures	Preconscious learning	Non-intentional learning from secondary levels of experience (what is happening in the background) (Boxes 1-3-6-4)
	Skills learning	Learning of simple procedures through imitation and repetition (Boxes 1-3-5-8-6 or 4-9)
	Memorization	The act of commitment information to memory (Boxes 1-2-3-6-[8-6]-4 or 9)
Reflective learning: learning involves reflection and may challenge social norms and structures	Contemplation	Mental consideration of an experience leading to some sort of conclusion (Boxes 1-2-3-7-8-6-9)
	Reflective skills learning	Skill development that entails not only the what by the why, skill with understanding (Boxes 1-2-3-5-7-8 looping until 7-8-6-9)
	Experimental learning	Pragmatic learning, thinking that leads to the testing and development of new practices (Boxes 1-2-3-7-5 looping until 7-8-6-9)

As Table 3.4 indicates, Jarvis identified at least nine different types of experiential 'learning' which he assigned to three categories — non-learning, non-reflective learning, and reflective learning (Jarvis, Holford, and Griffin 1998:49-55). Non-

learning occurs when an experience does not result in learning. In non-reflective learning, learning takes place, but without the element of reflection. Examples include memorization, the learning of simple skills through imitation and repetition, and unintentional learning from peripheral levels of experience such as that which occurs in the background. This type of learning reproduces culture and social structures uncritically. As the name implies, reflective learning occurs when a person engages in reflection on a particular experience or set of experiences. By its very nature, reflective learning entails a process of mulling over or asking questions that goes beyond the mere experience. Because it often considers the 'why' behind the 'what' and thinks beyond the experience to the 'what if', reflective learning may result in challenges to previous assumptions and conclusions and to social norms and structures.

3.3.5.4 *Learning Styles*

Kolb (1984) claimed that individuals exhibit personal preferences for particular phases of the learning cycle and thus are characterized by specific learning styles (or learning preferences). These differences in learning preference are usually attributed to factors such as heredity, life experiences, and the demands of the present environment. However, research has also indicated that learning preferences can be influenced by personality type, educational field, and a person's job or career (Kolb 1984), as well as the surrounding culture and social environment (Joy and Kolb 2009, Yamazaki 2004).

Based on experiential learning theory, Kolb and Fry published the *Learning Style Inventory* in 1971 to help people gain important information about their personal learning preferences in order to improve learning effectiveness. Updated periodically over the past forty years (1985, 1999, 2005, 2011), the inventory professes to measure an individual's preferred way of taking information from the environment and transforming it so that it makes sense. A self-administered, self-reporting instrument, the *Learning Style Inventory* measures the relative emphasis an individual places on each of the four learning phases in the experiential learning cycle (Dixon, Adams, and Cullins 1997:41-43).

Soon after the release of Kolb's original *Learning Style Inventory* (1971), a plethora of such models and concepts were released. Coffield, Moseley, Hall, and Ecclestone (2004) examined no fewer than seventy-one learning style models, many of which have little real theoretical base. Rather than endeavoring to regurgitate their commentary, this section will focus on two of the most prominent approaches to learning styles, those of Kolb (1984) and Honey and Mumford (1982).

As is illustrated in Table 3.5, Kolb's original model lists four learning styles — divergers, convergers, accommodators, and assimilators (Kolb 1984:76-94) — one in each quadrant.

Table 3.5: Matrix View of Kolb's Learning Styles

LEARNING STYLE MATRIX	Doing (Active Experimentation - AE)	Watching (Reflective Observation - RO)
Feeling: Concrete Experience (CE)	Accommodating (CE/AE)	Diverging (CE/RO)
Thinking: Abstract Conceptualization (AC)	Converging (AC/AE)	Assimilating (AC/RO)

Divergers learn primarily through reflective observation on concrete experiences, preferring to watch others and reflect on their experience. They tend to examine situations from various perspectives and identify many possible solutions to challenging situations. Characteristically, they are strong in imaginative ability, good at generating ideas, and function well in a group environment. They learn best by focusing on the product (big picture) as opposed to detail (Fasokun, Katahoire, and Oduaran 2005:97,100).

Preferring a cognitive approach, *assimilators* tend to grasp experience through abstract conceptualization, transforming it through reflective observation. People who prefer this learning style are adept at understanding information from various sources and expressing it in a concise, logical form. They excel at inductive reasoning and the creation of theoretical models, but place little emphasis on practical application. Assimilators tend to show far more interest in concepts than people. They function well in learning environments that feature well-organized

lectures, academic reading, and analytical thinking (Kolb, Koyatzis, and Mainemelis, 2001:194-197).

Convergers are characterized by abstract conceptualization followed by active experimentation with a view toward arriving at a solution. They tend to excel at finding practical applications for ideas and theories and use deductive reasoning to solve problems. Convergers prefer to deal with technical challenges and not with social or interpersonal issues (Kolb et al. 2009:194-197). They seek to find the “best single answer to a problem” and “acquire knowledge by thinking, analyzing and applying their new ideas and concepts to real-life situations” (Fasokun et al. 2005:101).

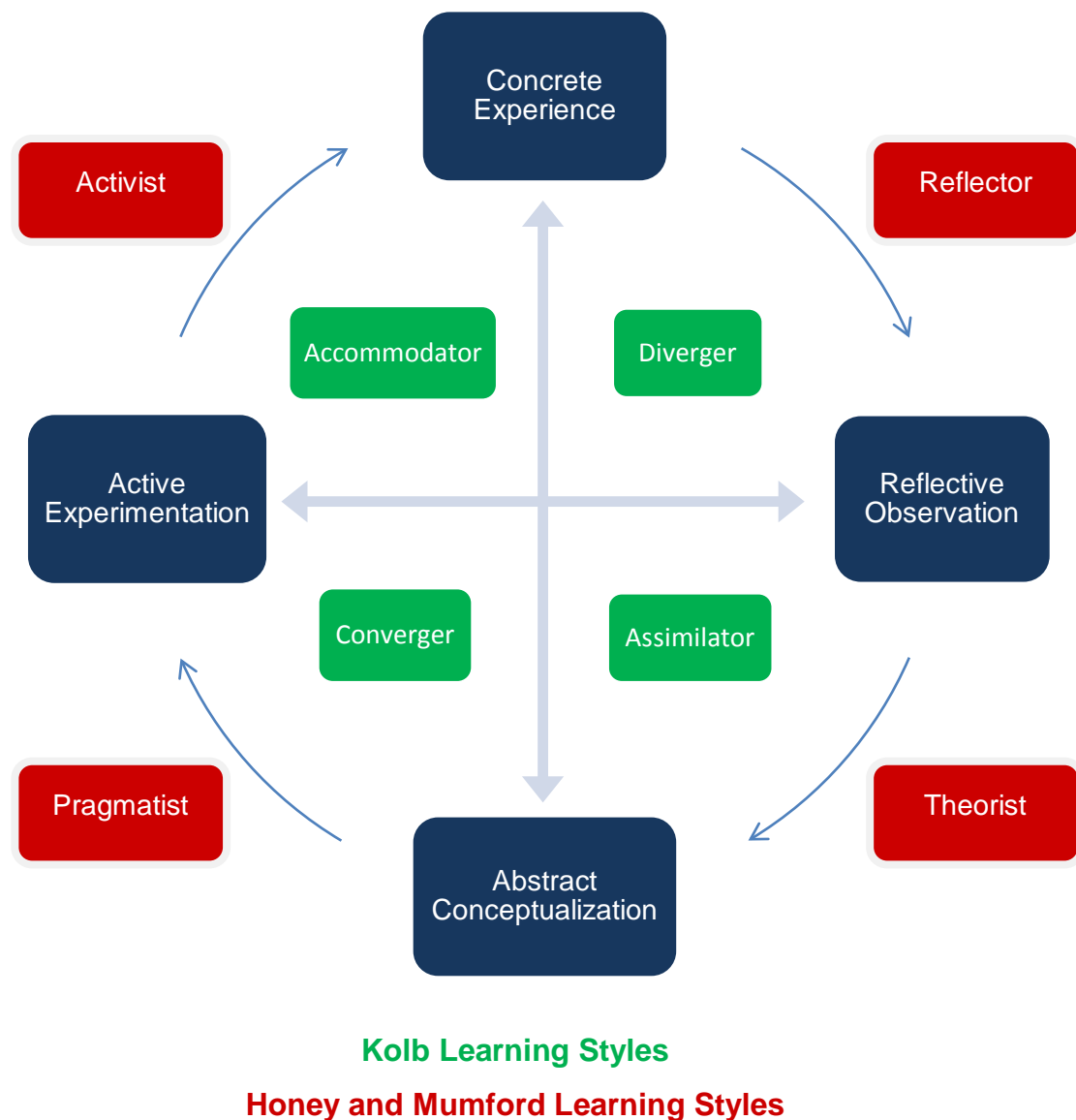
Accommodators prefer learning through concrete experience and active experimentation. They are action-orientated individuals who enjoy “hands-on” involvement in new and challenging experiences and often rely on intuition rather than logic. Willing to take risks, accommodators often do well in situations that require flexibility and adaptation (Kolb et al. 2001:194-197). In problem-solving situations, individuals with this learning style usually undertake a trial and error approach, relying more heavily on other people for information than on their own technical analysis. As one might expect, they enjoy a practical action-based learning environment.

Claiming empirical support (Kolb and Kolb 2005:193-212), version 4.0 of the *Learning Style Inventory* has been expanded from the four characteristic styles to include nine new styles: initiating, experiencing, imagining, reflecting, analyzing, thinking, deciding, acting, and balancing. The new version also endeavors to measure ‘learning flexibility’, which the instrument describes as the ability to adapt to the demands of different learning situations (Hay Group 2011).

Based upon Kolb’s approach, Honey and Mumford (1982, 1983, 2000, 2006) further developed and adapted the concept of learning styles, creating the *Learning Styles Questionnaire* (LSQ), simplifying Kolb’s descriptors and probing actual behavior instead of learning preferences. As Clark (2011b) noted, rather than suggesting that people have a dominant learning style, Honey and Mumford proposed that preferred methods of learning depend upon the situation and level

of experience. Unlike those in Kolb's approach, preferences in the *Learning Style Questionnaire* are considered to be adaptable instead of relatively permanent. Thus, people tend to move between the four modes of learning as needed. In addition, rather than focusing on how people learn, this tool examines work-related behaviors with a view toward helping participants become better learners by identifying and strengthening styles that are poorly utilized in everyday situations at work

Figure 3.11: Combined Learning Styles of Kolb and Honey and Mumford



In the *Learning Styles Questionnaire* (2006), Honey and Mumford identify four styles — reflector, theorist, pragmatist, and activist — essentially paralleling Kolb's diverger, assimilator, converger, and accommodator. The reflector spends

time thinking about experiences. The theorist makes connections and abstracts ideas from experience. The pragmatist likes to apply new learning to actual practice to see if it works. The activist delights in new and challenging experiences.

Honey and Mumford (1982) claimed that a personal awareness of learning style helps people build on their strengths and minimize weaknesses, improving the quality of learning.

3.3.5.5 Criticisms of Experiential Learning Theory

Experiential learning theory and learning styles have generated a considerable amount of discussion and research among scholars. Criticisms tend to focus on two points of contention — theoretical limitations and empirical validation, especially in regard to the learning style instruments. Critics of learning styles are in two camps, one accepting the general methodology but critical of specific models that do not meet the criteria of the discipline, and the other essentially rejecting the basic premises on which this theory is built (Coffield et al. 2004:45).

Recent research by Pashler, McDaniel, Rohrer, and Bjork (2008:106-116) concluded that, in spite of an indication that people do express various aptitudes toward learning, there is little credible evidence to justify the use of learning style instruments in education or the ‘meshing’ of instructional approaches with learning styles. The authors noted that certain studies actually contradicted the hypothesis that people whose preferred learning styles are used learn more effectively than those whose preferred learning styles are not used. Coffield et al. (2004) found that In spite of enthusiastic support by many of the developers of learning style instruments, matching instruction to an individual’s preferred mode of learning demonstrates no greater learning effectiveness than designing instruction that is content-appropriate. Howard-Jones (2010:20-36), who seeks to integrate neuroscience with education, went so far as to classify the concept of learning styles as a ‘neuromyth’.

Jarvis (2006:10-11) pointed out a number of weaknesses in Kolb’s model of experiential learning, noting that it is far too simplistic. He expressed concern

that the model omits the actual person, how the person is changed, the influence of the social situation, the process of reason, the role of emotion, and the reality that humans often do not 'universalize' experience. In addition, he criticized his own model, noting that he did not adequately capture its complexity, account for reason and emotions, fully appreciate the role of memory in relation to the learner and the learner's life history, depict the continuous nature of learning, or adequately examine evaluation and planning (Jarvis 2006:12). In addition, Jarvis faulted his model for creating an artificial distinction between cognitive and practical learning and for minimizing the importance of emotions.

Brookfield (1995:6) highlighted another area of concern. Since our structures of understanding and perceptual filters are culturally embedded, experience and our response to it are not neutral. This often results in non-critical learning that perpetuates faulty thinking and associated embedded perspectives.

While there is little doubt that experience plays a role in learning, it is quite clear from the literature that we are a long way from understanding the exact nature of that role.

3.3.6 Constructivism

Still a trendy and hotly debated topic in contemporary education, constructivism has been described variously as a philosophy, epistemology, cognitive position, and pedagogical orientation (Noddings 1998:115). As a theory of learning, constructivism rests on an assumption that knowledge is actively constructed by learners as they endeavor to make sense of their experiences in the world (Driscoll 2000:376).

Constructivist learning theories developed out of the cognitive revolution as psychologists and educationalists increasingly understood the significance of the learner's role in the learning process. Learners were no longer viewed as empty vessels waiting to be filled with objective knowledge, but rather as active beings seeking to make meaning of life. Rather than being passive, learning began to be seen as an active process of constructing knowledge based upon experience and context. Since each person constructs their own knowledge based on personal

experiences, 'reality' is different for each person. The goal of education, therefore, is no longer the teaching of objective truth or knowledge. Instead, the educator seeks to help the learner develop his or her own personal constructions of reality.

To this day, it is constructivist epistemology that creates the most debate. As an epistemology, constructivism maintains that knowledge and reality do not have an objective, absolute value or, at least, not a reality that we can independently know (Murphy 1997). On an epistemological continuum, objectivism and constructivism would be positioned at opposite extremes.

As one can surmise, constructivism is a multifaceted theory based upon three loosely connected concepts (Kanselaar 2002:1).

- An epistemological worldview that questions if humans can know an independent reality
- Psychological perspectives that learning is an active process in which knowledge is constructed
- Educational perspectives on pedagogy suggesting that the role of instructors is essentially supportive and facilitative

The approach to education advocated by constructivists has generated much discussion and research. Murphy (1997:1-2) contended that the process(es) by which human beings come to 'know' must provide the basis for educational practice. If learners merely receive information passively, then instruction should primarily focus on knowledge transmission. However, if learners actively construct knowledge as they attempt to make sense of their experience, then the essence of 'learning' is no longer knowledge reception but rather the development of meaning and understanding.

Von Glasersfeld (1984:17-40, 1998:23-28) identified several key epistemological tenets of constructivism. For the constructivist, knowledge is not received passively, but results from active cognition on the part of an individual. Cognition is the process by which a person organizes and makes sense of experience. This representation may or may not be an accurate reflection of reality. Cognition

is also viewed as an adaptive process through which one's behavior becomes increasingly 'viable' in a particular environment.

As Jarvis, Holford, and Griffin (2003:163) observed, constructivism carries with it a number of assumptions and implications. Learning is cumulative; and understandings are constructed over time. New information and new experiences are interpreted with reference to existing mental constructs; and new information and experience are used to enhance or modify these constructs. In addition, in the constructivist view, the learner rather than the teacher determines what is really learned. Learning only occurs if the learner chooses to engage in the learning process. When presented with new information or a new experience, learners endeavor to construct an understanding or interpretation that aligns with existing images of the social or natural world as they know it. When new experiences or ideas challenge existing constructs, the resulting internal conflict often results in a resistance to learning.

Ormrod (1999:171) noted that constructivist perspectives are both individual and social. Not only does constructivism consider the individual construction of knowledge, but it places emphasis on social, cultural, and contextual elements as well.

Fox (2001:24) summarized constructivist assumptions as follows.

- (1) "Learning is an active process."
- (2) "Knowledge is constructed, rather than innate or passively absorbed."
- (3) "Knowledge is invented not discovered."
- (4) "All knowledge is personal and idiosyncratic."
- (5) "All knowledge is socially constructed."
- (6) "Learning is essentially a process of making sense of the world."
- (7) "Effective learning requires meaningful, open-ended, challenging problems for the learner to solve."

3.3.6.1 *Roots and Branches*

As Driscoll (1994:375) and Ormrod (1999:171) noted, constructivism developed from a number of roots, including Tolman's concept of the cognitive map, Piaget's views on cognition and development, Vygotsky's work on social interaction, Dewey's 'active learning', Bruner's theory that learners actively construct new ideas or concepts based upon existing knowledge, von Glasersfeld's radical ideas on epistemology, Kuhn's arguments relating to revolutionary science and paradigm shifts, and the critical role context plays in learning.

In addition to multiple roots, constructivism also has multiple branches. Though Ernest (1995:459) rather humorously remarks that "there are as many varieties of constructivism as there are researchers", it is relatively easy to identify the most prominent constructivist perspectives. The following sections will briefly examine Piaget's cognitive constructivism, the radical constructivism of von Glasersfeld, the learning approach and social-cultural constructivism of Bruner, and the social constructivism of Vygotsky.

3.3.6.2 *Piaget's Cognitive Constructivism*

Cognitive constructivism developed out of the work of Jean Piaget. As mentioned previously, Piaget's primary area of research was the cognitive development of children. Piaget's constructivism focuses on how the individual constructs knowledge through internal processes (Powell and Kalina 2009:241). Piaget posited that information given to humans cannot be immediately understood and put to use. Rather, knowledge must be actively constructed as a result of experience (Piaget 1953). According to Phillips (1995:9), Piaget saw people as both mentally and physically active, with growth in knowledge facilitated by the processes of assimilation, accommodation, and equilibration, and the construction and internalization of schemas. What facilitates this process is 'perturbation', a state of mental disturbance or agitation. "Cognitive change and learning take place when a scheme, instead of producing the expected result, leads to perturbations" (Von Glasersfeld 1996:8). Perturbation, in turn, leads to accommodation in an effort to establish a new equilibrium.

Piaget's approach to learning directly reflected his theoretical perspectives. Espousing a learner-centered educational philosophy, he favored an active learning approach in which teachers served as facilitators and learners were provided with opportunities to experiment, discuss, and ask questions. Because he saw learning as an active process intimately associated with solving problems in the real world, he was an advocate of learning environments that are interesting and meaningful to learners, and of learning experiences composed of authentic, whole, meaningful activities that are part of real life. In *To Understand Is to Invent*, Piaget (1972:20) stated, "To understand is to discover, or reconstruct by rediscovery". Should educators truly desire to develop individuals capable of production and creativity, then opportunities to discover simply must be provided (Piaget 1972:20).

Piaget's perspective is summarized in the following statement.

Fifty years of experience have taught us that knowledge does not result from a mere recording of observations without a structuring activity on the part of the subject. Nor do any a priori or innate cognitive structures exist in man; the functioning of intelligence alone is hereditary and creates structures only through an organization of successive actions performed on objects. Consequently, an epistemology conforming to the data of psychogenesis could be neither empiricist nor preformationist, but could consist only of a constructivism. (Piaget 1980: 23)

3.3.6.3 Von Glasersfeld's Radical Constructivism

A philosopher and cybernetician, Ernst von Glasersfeld was the founder of *radical constructivism*. Born in Germany, von Glasersfeld spent time in Ireland and Italy and eventually relocated to the USA, where he served as emeritus professor of psychology at the University of Georgia and research associate at the University of Massachusetts (Amherst).

Essentially epistemological in orientation, radical constructivism was inspired by an epistemological treatise composed by Giambattista Vico in 1710. Vico posited

that humans as epistemic agents can know nothing other than the cognitive structures they themselves have developed. For Vico, 'knowing' meant 'knowing how to make', understanding fully at the most basic component level. As such, he suggested that only God could know the real world; and humans can only know what they have constructed (von Glasersfeld 1996:4).

Von Glasersfeld (1996:2) viewed constructivism as a "theory of active knowing, not a conventional epistemology that treats knowledge as an embodiment of Truth that reflects the world 'in itself', independent of the knower". For constructivists, the word 'knowledge' carries a radically different connotation from that associated with objectivist perspectives (von Glasersfeld 1996:4). Knowledge is regarded as the result of "an individual subject's constructive activity, not a commodity that somehow resides outside the knower and can be conveyed or instilled by diligent perception or linguistic communication" (von Glasersfeld 1990:37).

To the radical constructivist, knowledge is conceptual structures, the "map of paths of action and thought", which are viable for us in our own experience (Von Glasersfeld 1996:5). Thus, viability becomes the ultimate test and aim of constructed knowledge. For the radical constructivist, 'truth' can never be known with certainty (von Glasersfeld (1990:9). Radical constructivism does not deny ontological "reality". Rather, it denies that humans are able to perceive or experience this reality accurately (von Glasersfeld 1996:5) .

Von Glasersfeld (1988:83) highlighted two principles as intrinsic to radical constructivism.

- (1) "Knowledge is not passively received either through the senses or by way of communication, but it is actively built up by the cognizing subject."
- (2) "The function of cognition is adaptive and serves the subject's organization of the experiential world, not the discovery of an objective ontological reality."

Building on Piaget's cognitive constructivism, von Glasersfeld commented that in both the theory of evolution and the constructivist theory of knowing, viability is intimately linked to equilibrium, a state in which a person's cognitive structures

yield expected results, free of conceptual conflicts or contradictions. For the constructivist, knowledge functions to resolve or eliminate perturbations (von Glasersfeld 1996:7).

Like Piaget, von Glasersfeld focused on the individual learner. Groups or social settings are simply considered part of the environment.

Though radical constructivism purports to increase ownership in learning, it has met with extensive criticism among both scholars and educators, primarily due to its perspectives on epistemology .

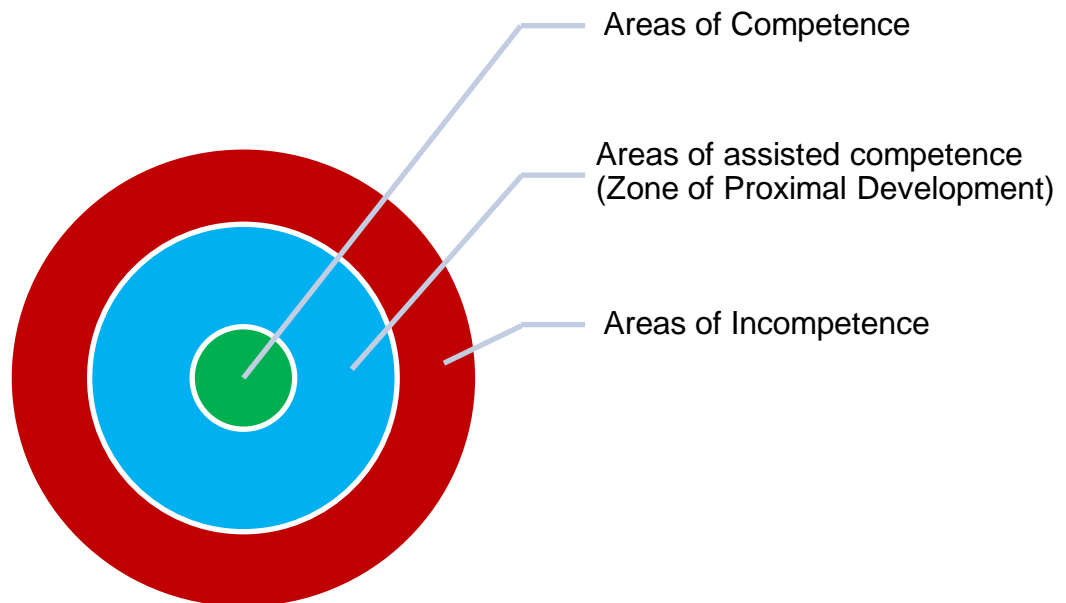
3.3.6.4 *Social Constructivism*

Primarily an outgrowth of the work of Russian psychologist Lev Vygotsky, *social constructivism* suggests that knowledge and understanding(s) are “constructed when individuals engage socially in talk and activity about shared problems or tasks” (Driver, Asoko, Leach, Scott and, Mortimer 1994:7). In the social constructivist perspective, meaning is made through a process of dialogue, and learning takes place as those skilled in a particular culture assist those less-skilled to acquire knowledge and new skills in their understanding of reality. Two common applications of social constructivism are *situated learning* and *cognitive apprenticeships*, both of which are based upon Vygotsky’s ideas.

An important concept in Vygotsky’s theory is the *zone of proximal development* — “the distance between the actual level of development as determined by independent problem solving” (without assistance) “and the level of potential development as determined by problem solving under adult guidance or in collaboration with more capable peers” (Vygotsky 1978:86). In other words, the zone of proximal development describes the space between a learner’s current skill level and the next skill level that the learner can reach with assistance (Dennen and Burner 2008:426). When more competent people offer instruction and support (scaffolding) in a person’s zone of proximal development, cognitive growth occurs, understanding is increased, and new skills are developed. Though this concept is applied primarily to the development of children, it is pertinent to social learning among adults as well.

Figure 3.12: The Zone of Proximal Development

(adapted from Vygotsky 1978)



Brown, Collins, and Duguid (1989:32) argued that there is an inseparable connection between activity (in which knowledge is developed and deployed) and authentic, meaningful learning and cognition. Since knowledge is created through activity in a specific social context, learning and cognition are fundamentally 'situated'. According to Dennen (2004:814), situated learning occurs through "active participation in an authentic setting". Barab and Roth (2006:3) noted that, in situated learning, 'knowing' is an activity and not a thing, contextualized rather than abstract, reciprocally constructed through interaction between the individual and environment, not objectively defined or subjectively created, and a functional stance rather than a 'truth'. Situated learning essentially abandons the treatment of concepts as "self-contained entities", viewing them instead as tools that are understood only through use. Advocates maintain that this type of engagement is far more effective in facilitating relevant, transferable learning than the more common information-dissemination learning methods (Dennen 2004:814).

The concept of situated learning was developed in the late 1980s by Jean Lave (with Etienne Wenger). Lave proposed that learning is basically a function of the activity, context, and culture in which it occurs (Lave and Wenger 1991). In

situated learning, learning is far more than the transmission of abstract knowledge from one individual to another. Rather, it is a social, contextual process by which knowledge is co-constructed. This 'situated' learning occurs by means of 'legitimate peripheral participation' within a *community of practice* (Lave and Wenger 1991:29-37).

Communities of practice are groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an on-going basis (Wenger, McDermott, and Snyder 2002:4).

A community of practice combines three key elements (Wenger et al. 2002:27).

- A domain of knowledge which defines issues and focus
- A community of people who share a concern about this domain
- Continually developing shared practice(s) relevant to the domain

Legitimate peripheral participation entails both being active in the practices of a social community and constructing one's identity in relation to that community (Wenger 1999:4). Learning in such communities is often unintentional. Nonetheless, as the learned expertise of participants increases, they gradually move toward the center of the community of practice.

A unique form of situated learning, *cognitive apprenticeship* is a learning-through-guided-experience apprenticeship process that employs cognitive and metacognitive skills, authentic activity, and social interaction to guide learning and enculturate learners into authentic practices (Dennen and Burner 2008:426; Collins, Brown, Newman 1989:456). Unlike learning in a community of practice, cognitive apprenticeship is an intentional process that shares many characteristics with trade apprenticeship. Learning takes place as novices and experts interact socially in the completion of a task (Dennen 2004:814). As the name implies, cognitive apprenticeship focuses on developing cognitive skills through participation in authentic learning experiences. As Brown (1998:230) noted, "The central issue in learning is becoming a practitioner, not learning about practice".

Proponents of cognitive apprenticeship, Brown, Collins, and Duguid (1989:32) argued that research validates the effectiveness of learning transfer through activity in a social context. Educational processes that ignore the situated nature of cognition are often self-defeating.

Represented in Table 3.5, the model of cognitive apprenticeship proposed by Collins, Brown, and Newman (1989:453-494) includes four key elements — methods, sequencing, sociology, and content.

Table3.5: The Learning Environment for Cognitive Apprenticeship

(adapted from Collins et al. 1989:453-494)

CONTENT					
Types of knowledge required for expertise					
Domain knowledge	Heuristic strategies	Control strategies	Learning strategies		
METHOD					
Promoting the development of expertise					
Modeling	Coaching	Scaffolding	Articulation	Reflection	Exploration
SEQUENCING					
Ordering learning activities					
Global before local		Increasing Complexity		Increasing diversity	
SOCIOLOGY					
Social characteristics of learning environments					
Situated learning		Communities of practice		Intrinsic motivation	
				Cooperation	

Collins (2006:47-58) explained that learners need domain knowledge and strategic (tacit) knowledge to develop expertise. Domain knowledge includes explicit concepts, facts, and procedures relevant for the learner to master the task(s) or skill(s). Strategic knowledge includes heuristic strategies (tricks of the

trade), control strategies (monitoring, assessment, diagnostic, and remedial aspects), and learning strategies for the types of knowledge involved.

The ‘teaching’ methods listed by Collins (2006:50-51) give learners an opportunity to “observe, engage in, and invent or discover expert strategies in context”. Modeling, coaching, and scaffolding are core methods in traditional apprenticeship. These help learners develop an integrated set of skills through observation and guided practice. The use of cognitive apprenticeship in teaching and learning requires that tacit processes be externalized (made visible) so that learners are able to observe and practice them (Collins et al. 1989). Articulation and reflection assist learners to process observations of expert problem solving and to consider and express their own problem solving strategies. Exploration encourages learner autonomy.

Endorsing and expanding this model, Enkenberg (2001:503) suggested the following instructional methods as being supportive of cognitive apprenticeship:

- Modeling the task, enabling learners to build a conceptual model of what is required to fulfill the task.
- Explaining the ‘why’ of activities and procedures.
- Coaching that monitors learner activities, assisting and supporting when necessary through suggestions and feedback.
- Scaffolding to support learners as they seek to cope with the task situation, withdrawing gradually as competence increases.
- Reflection by the learner, analyzing and assessing performance.
- Articulation of ideas and reflections.
- Exploration that encourages learners to form and test their own hypotheses and to consider new ideas and viewpoints.

Sequencing is also important. Initial tasks should be simple and doable, gradually increasing in complexity and diversity. Having a clear conceptual model of the overall activity helps learners make sense of their specific responsibilities as a part of the whole (Collins 2006:50-51).

The social aspect of cognitive apprenticeship is central to its effectiveness. “Apprentices learn skills in the context of their application to real-world problems, within a culture focused on and defined by expert practice” (Collins 2006:532). Moreover, the social nature of apprenticeship tends to promote a positive outlook on learning and expertise, increasing motivation, building confidence, and promoting an optimistic orientation toward problems encountered in the learning process.

Rogers (2002:104) noted that interest in situated learning and cognitive apprenticeships has led to an increase of mentoring and deliberate role modeling in education and training, not only in the areas of knowledge and skills, but in attitudes as well.

3.3.6.5 Bruner’s Perspectives on Education

In addition to his contributions to cognitivism, Jerome Bruner promoted the application of constructivism in education. Bruner’s outlook is well summarized in the following comment.

To instruct someone ... is not a matter of getting him to commit results to mind. Rather, it is to teach him to participate in the process that makes possible the establishment of knowledge. We teach a subject not to produce little living libraries on that subject, but rather to get a student to think ... for himself, to consider matters as an historian does, to take part in the process of knowledge-getting. Knowing is a process not a product. (Bruner 1966:72)

For Bruner, the learner is the center of activity in learning. A strong advocate of ‘discovery learning’, Bruner recognized the importance of “permitting the student to put things together for himself, to be his own discoverer” (Bruner 1979:82). Bruner (1961:22) defined discovery as “all forms of obtaining knowledge for oneself by the use of one’s own mind”. An inquiry-based, constructivist learning approach, discovery learning challenges the learner to draw upon prior experience and existing knowledge to solve problems. “Discovery ... is in its essence a matter of rearranging or transforming evidence in such a way that one

is enabled to go beyond the evidence ... to new insights” (Bruner 1979:82). As Yount (1996:199) noted, discovery learning is all about student activity, student initiative, and student solutions.

Discovery learning is characterized by the following attributes (Bicknell-Holmes and Hoffman 2000:314-315):

- “The creation, integration and generalization of knowledge through exploration and problem solving.”
- “Interest-based activities in which the learner exercises some control over the sequence and frequency.”
- “Activities that strive to integrate new knowledge with the learner’s existing knowledge base.”
- “Emphasis on learning rather than content.”
- “Recognition of the importance of ‘failure’ as a tool for examination, reflection, and refocused efforts.”
- “Involvement of students in higher levels of cognitive processing, such as synthesis, evaluation, extrapolation, and analysis.”
- “Integration of feedback opportunities into instruction or activities.”

To be optimal, discovery learning requires guided practice, sufficient prior knowledge, opportunities for reflection, and contrasting options (Driscoll 2000:231). In addition, teachers/facilitators must be willing to serve as ‘thinking’ models, invest the time required to develop materials, exercise patience and competence in guiding students, and become thoroughly versed in subject matter (Yount 1996:200).

Pure discovery learning has come under increasing criticism due to the huge amounts of time required from teachers/facilitators for students to ‘discover’ even basic concepts. In addition, it was found to be very inefficient and even inappropriate in situations with learners from diverse backgrounds, when subject matter was difficult, and when learning priorities were unclear (Yount 1996:200-201). In response to criticism from both academics and educationalists, more directed forms of discovery learning were developed, allowing teachers greater

control over the learning process and reducing frustration among teachers and learners alike.

Recognizing that “learning and thinking are always situated in a cultural setting and always dependent upon the utilization of cultural resources” (Bruner 1996:4), Bruner became increasingly interested in sociocultural aspects of learning as he aged. Though most of his focus was on the development of children, many of his perspectives also apply to adult learners. Bruner observed that culture shapes the human mind, providing a ‘toolkit’ by which people construct their self-concept and understanding of the world (Bruner 1996:x). He suggested that meanings and meaning-making can only be appropriately interpreted when viewed against the structure and coherence of the context(s) in which meanings are created and transmitted (Bruner 1990:63-64).

Table 3.6: Individual and Social Perspectives in Constructivism

(adapted from Cobb 1994)

Area of Contrast	Cognitive Constructivism	Sociocultural Constructivism
Theoretical focus	individual processes	psychological, social, cultural processes
Learning	active cognitive reorganization	acculturation into an established community of practice
The mind	in the head	in the individual-in-social interaction

Culture psychology maintains that knowledge of the world is organized and managed in two distinct ways — logical-scientific thinking and narrative thinking. Bruner noted that traditional education tends to favor logical-scientific thinking at the expense of narrative; yet “it is only in the narrative mode that one can construct an identity and find a place in one’s culture” (Bruner 1996:42). He advocated the development of an approach to learning that integrates modeling and apprenticeship, appropriate didactic teaching, a constructivist view that includes intersubjective interchange, and a perspective that helps people make an appropriate distinction between personal knowledge and “what is taken to be known” by the culture, ‘objective’ knowledge that has stood the test of time (Bruner 1996:44-65). According to Bruner (1996:67-68), the cultural contexts that enhance mental development are most often interpersonal and involve symbolic

and interactive exchanges with peers and authority figures. This kind of collaboration enables a learner to access the resources, symbol systems, and technology of the culture.

3.3.6.4 Contributions and Criticisms of Constructivism

As a learning theory, constructivism has received both praise and criticism. Most praise relates to the learning methodology, especially learner centeredness, the commitment to active learning, and the role of social interaction in learning. Criticisms of constructivism fall into two basic categories — epistemological and practical.

A number of scholars have questioned the effectiveness of constructivist learning methods. Kirschner, Sweller, and Clark (2006:75) expressed concern that constructivist approaches ignore both human cognitive architecture and fifty years of evidence from empirical studies that consistently expose the relative ineffectiveness and inefficiency of minimally guided instruction over against approaches that emphasize guidance in the student learning process. Only when the prior knowledge of learners is sufficient enough to provide internal guidance, allowing teachers to act in supportive role, do constructivist methodologies have an advantage. The lack of structure can cause frustration, and the lack of a clear standard makes evaluation difficult.

Mayer (2004:15) also argued that some constructivist teaching techniques are inefficient and ineffective. In particular, he described a constructivist teaching fallacy in which educators sometimes apply constructivist teaching techniques in a manner that requires learners to be behaviorally active instead of cognitively active. True constructivist teaching keeps learners cognitively active during learning while teachers/facilitators provide guidance.

From an epistemological perspective, Carson highlighted several problematic assumptions associated with constructivism. Accepting constructivism means “reality is dependent upon the perceiver”, “reason or logic is not the only means of understanding reality”, and “knowledge or truth is subjective and relative to the individual or community” (Carson 2005:232). Though Yount (1996:202-203)

affirmed the emphasis on student participation in constructivism, he was quick to point out the dangers associated with subjectivism, or the 'creation of one's own reality', which directly conflict with a biblical perspective. Meyer (2009:332-341) noted that the radical epistemology associated with constructivism has far-reaching consequences, essentially erasing any perception that one can 'know' truth. Since constructivism claims that ontological reality is not knowable, it then follows that it is not possible to distinguish between real knowledge, superstition, and even psychosis! For instance, Matthews (2003:52-53) noted that since relativism makes no distinction between objective (verifiable) knowledge (such as astronomy) and superstition (such as astrology), and the merits of a particular perspective are resolved through dialogue within a community, science and history are reduced to relativistic narratives subject to personal revision independent of verifiable data. The implications of this are far-reaching. While Phillips (1995:11) acknowledged the positive contribution constructivism has made to the epistemology debate, he expressed genuine concern regarding the strong drift toward relativism, the treatment of knowledge as a matter of sociopolitical processes or consensus, and the rejection of rational justification. Though many so-called constructivist practitioners adhere to student-centered learning approach and avoid the epistemological issues, Carson (2005:237) considered this untenable.

3.3.7 Multiple Intelligences

Developed by Howard Gardner, professor of cognition and education at the Harvard Graduate School of Education, adjunct professor of psychology, and senior director of Harvard Project Zero, the theory of *multiple intelligences* challenges the concept of 'fixed intelligence' (I.Q.) by suggesting that human beings possess a number of unique intelligences which enable them to solve problems and fashion products of value in various cultural settings (Gardner 1993:5-12).

Disenchanted with the rather limited view of intelligence so prevalent in the 1970s, Gardner undertook an extensive literature review in an effort to identify various criteria that he considered to be indicators of intelligence. Drawing from

biological sciences, logical analysis, developmental psychology, experimental psychology, and psychometrics, he eventually settled on eight criteria by which he would assess “candidate intelligences” (Gardner 1983: 62-69, 1999:36).

- (1) Potential for isolation by brain damage
- (2) Existence of idiot-savants, prodigies and other exceptional people
- (3) Presence of core operations
- (4) Evident developmental progression
- (5) Evolutionary history
- (6) Support from experimental psychological tasks
- (7) Support from psychometric tests
- (8) Susceptibility to encoding in a symbol system

Based on the criteria above, Gardner described seven intelligences in *Frames of Mind: The Theory of Multiple Intelligences* (1983), adding another ‘one and a half’ in *Intelligence Reframed: Multiple Intelligences for the 21st Century* (1999). According to Gardner, all human beings possess these intelligences; but each individual is characterized by a unique intelligence profile (Gardner 2003:8). Gardner (1999:33-34) defined intelligence as “a biopsychological potential to process information that can be activated in a cultural setting to solve problems or create products that are of value in a culture”. Activation of these intelligences depends upon the values and opportunities associated with the particular culture as well as personal decisions made by the individuals in question and the influential people in their lives.

Gardner (1999:41-42) described these intelligences accordingly.

Linguistic intelligence — sensitivity to spoken and written language, the ability to learn languages, and the capacity to use language to accomplish certain goals.

Logical-mathematical intelligence — the capacity to analyze problems logically, carry out mathematical operations, and investigate issues scientifically.

Musical intelligence — skill in the performance, composition, and appreciation of musical patterns.

Bodily-kinesthetic intelligence — the potential to use the whole body or parts of the body to solve problems or fashion products.

Spatial intelligence — the potential to recognize and manipulate the patterns of wide space as well as the patterns of more confined areas.

Interpersonal intelligence — the capacity to understand the intentions, motivations, and desires of other people, enabling a person to work effectively with others.

Intrapersonal intelligence — the capacity to understand and have an effective working model of oneself (including desires, fears, and capacities), and to use this information effectively in regulating one's life.

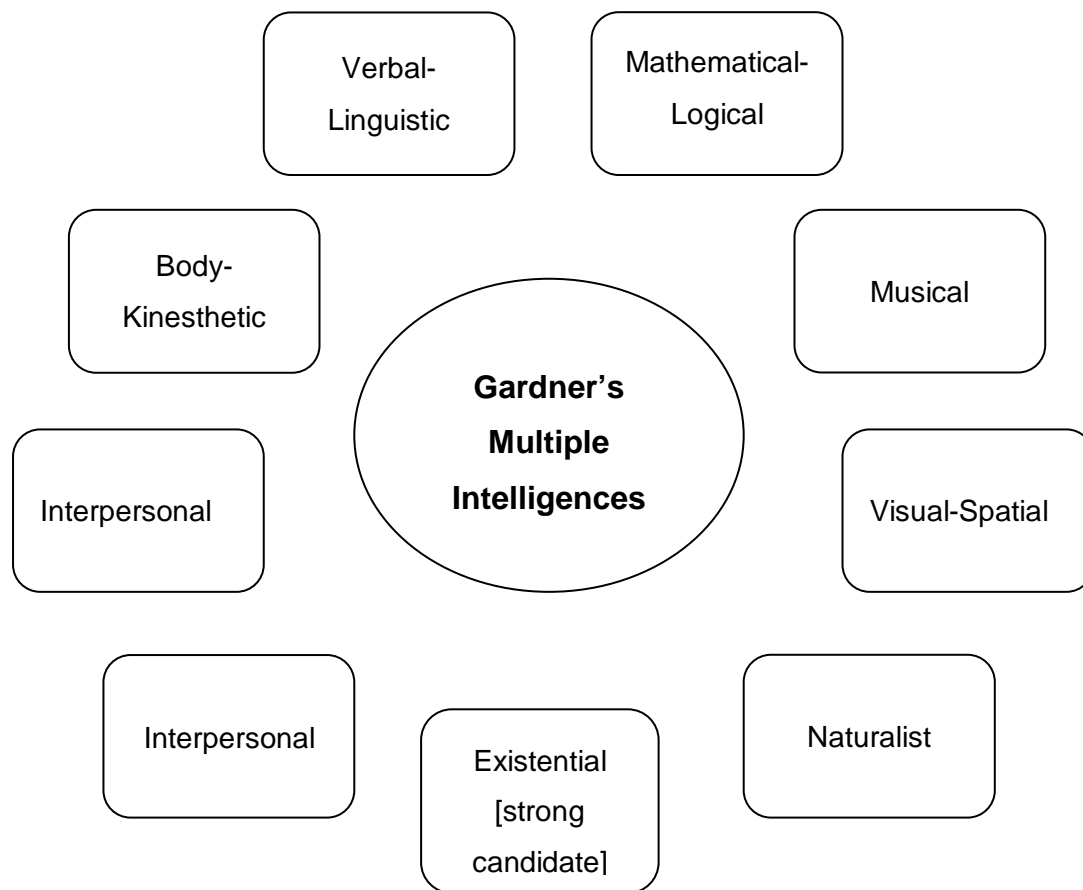
Naturalist intelligence — enables human beings to recognize, discriminate among, categorize, and draw upon features of the natural world such as living things (plants, animals), in animate objects, and characteristics of ecosystems.

Gardner (1999:53-66) seriously considered various possibilities concerning *spiritual intelligence and moral intelligence*. Due to the problematic and scientifically challenging nature of spiritual knowledge and experience, he rejected the term 'spiritual experience', opting instead to suggest the possible existence of *existential intelligence* — a concern with 'ultimate' issues, a capacity to consider profound questions about human existence and the meaning of life and death. Nonetheless, in spite of "the attractiveness of a ninth intelligence", he did not ultimately add existential intelligence to the list, finding "the phenomenon perplexing enough and the distance from the other intelligences vast enough to dictate prudence". Thus, for the time being, he has settled on "8½ intelligences". *Moral intelligence* was also rejected. Gardner holds that intelligence by nature is value-neutral, and that such an intelligence does not fit the full list of criteria. He remains open to the 'discovery' of other intelligences.

Gardner's (1999:44) theory of multiple intelligences makes two fundamental claims. First, his theory claims to be "an account of human cognition in its fullness", representing a new definition of human nature from a cognitive perspective. He credits evolution for equipping humans with distinct intelligences

or intellectual potentials, through which we can “mobilize and connect according to our own inclinations and our culture’s preferences” (Gardner 1999:44). Second, each human being has a unique blend of intelligences which “arise from the combination of a person’s genetic heritage and life conditions in a given culture and era” (Gardner 1999:45). These intelligences are strictly amoral and can be applied constructively or destructively by the individual.

Figure 3.13: Gardner’s Theory of Multiple Intelligences



Armstrong (2009:15-16) highlighted a number of principles critical to this theory. A theory of cognitive functioning, multiple intelligences proposes that each individual has capacities in all intelligences, with individuals “highly developed in some intelligences, modestly developed in others, and relatively underdeveloped in the rest”. Nonetheless, all unimpaired individuals have the capacity to develop each intelligence to a level of competency. Intelligences are not isolated but work together in complex ways to solve problems or create contributions of cultural

value. In addition, there are many ways to be intelligent within each intelligence category. Multiple intelligence theory “emphasizes the rich diversity of ways in which people show their gifts within intelligences as well as between intelligences” (Armstrong 2009:16).

Though academic psychology has been reserved in its acceptance of multiple intelligences theory, to Gardner’s surprise, the field of education has been quick on the uptake (Gardner 2003:6). Educational theorists, policymakers, curriculum designers, and classroom teachers have enthusiastically, and often uncritically, embraced the concept of multiple intelligences, even implementing major changes in their approach to education. As Ormrod (2000:127-128) noted, Gardner’s theory presents the possibility that most, if not all, students are intelligent in some way and that the use of a variety of teaching methods is more likely to stimulate and capitalize on students’ abilities. An enthusiastic advocate of multiple intelligences, Armstrong (2009:54) asserted that this theory makes its most meaningful contribution to education by highlighting the need for teachers to expand their “repertoire of techniques, tools, and strategies” beyond the linguistic and logical approaches that dominate much of contemporary education. Viens (1999) observed that the application of multiple intelligences theory in the classroom motivates educators to engage in a critical process of practice and reflection as they decide how best to apply, revise, and add to their teaching process.

In addition to impacting learning strategies, the theory of multiple intelligences also has implications for adult learning and development, giving adults an understanding of why certain careers may not seem satisfactory, helping them to rediscover potentials left behind as a child, and encouraging further development through courses, hobbies, and self-help programs (Armstrong 2010).

In spite of its apparent popularity among educationalists, Gardner’s theory of multiple intelligences has received a considerable amount of criticism from both psychologists and educators. Lamenting both the celerity with which education has embraced multiple intelligences and the proliferation in multiple intelligence websites and products, Waterhouse (2006a:208-214) highlighted the theory’s lack of empirical support as a genuine concern. Bolstering this concern, neither

Allix (2000) nor Sternberg and Grigorenko (2004) were able to find any empirical studies validating Gardner's claims. Strengthening her position, Waterhouse pointed out that Gardner and Connell (2000:292) have already admitted to a lack of "hard evidence" in support of multiple intelligences. A rebuttal by Gardner and Moran (2006) claimed empirical support for multiple intelligences, but Waterhouse (2006b:247-255) remained unconvinced. Interestingly, in an apparent response to Waterhouse's commentary on the absence of supporting neurological evidence, Gardner further explained intelligences "as composites of fine-grained neurological subprocesses but not those subprocesses themselves, as biopsychological information processing capacities, and as the bases on which an individual can participate in meaningful activities in the broader cultural milieu" (Gardner and Moran 2006:227).

Echoing Waterhouse's lament, Clark (2009b) expressed misgivings about the 'seductiveness' of Gardner's theory, citing its alluring appeal to teachers who are largely unaware of problematic empirical issues and the increasingly outspoken challenge from neuroscience. In a straightforward manner, Clark (2009b) asserted that this theory suffers from "conceptual invention and simplicity", unsupported by 'brain science'. In a recent Becta⁷ report, Howard-Jones (2010) recognized the appeal such a theory would have among teachers. Nonetheless, he directly challenged its scientific credibility, labeling the theory a 'neuromyth'.

In educational terms, MI theory appears like a liberator — providing teachers with the 'scientific' license to celebrate diversity. In terms of the science, however, it seems an unhelpful simplification as no clearly defined set of capabilities arises from either the biological or psychological research (Howard-Jones 2010:28).

As attractive as the theory of multiple intelligences may be, most neuroscientists and psychologists are hesitant to embrace its basic tenets.

⁷ British Educational Communications and Technology Agency (dissolved in April 2011)

3.3.8 Transformative Learning

Primarily developed by Jack Mezirow, emeritus professor of adult and continuing education at Columbia University, the theory and practice of transformative or transformational⁸ learning has become a central focus in literature pertaining to adult learning theory. Mezirow (1996:162) described transformative learning as “the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one’s experience in order to guide future action”. Expanding upon this, Cranton (2006:vi) more clearly described transformative learning as “a process by which previously assimilated assumptions, beliefs, values, and perspectives are questioned and thereby become more open, permeable, and better justified.” In addition, transformative learning may be viewed as the “epistemology of how adults learn to think for themselves rather than act upon the assimilated beliefs, values, feelings and judgments of others” (Mezirow 2003a:1).

According to Mezirow (1990:1), we make ‘meaning’ when we endeavor to interpret or make sense of an experience. When this interpretation is used to guide decision-making or an action, the making of ‘meaning’ becomes ‘learning’. Mezirow defined learning as “the process of making a new or revised interpretation of the meaning of an experience, which guides subsequent understanding, appreciation, and action” (Mezirow 1990:1).

At the center of transformative learning are the processes of critical reflection and critical-dialectical discourse (Mezirow 2003a:1). Over a lifetime, adults acquire a body of experience that includes associations, concepts, values, feelings, and conditioned responses, all of which contribute to the development of assumptions that influence their view of the world. Mezirow (1997:5) labeled these structured assumptions *frames of reference*. Frames of reference tend to develop through cultural assimilation and the “idiosyncratic influences of primary caregivers” (Mezirow 1997:6).

⁸ The terms are used interchangeably in the literature.

Consisting of *habits of mind*, *meaning perspectives*, and *mindsets*, frames of reference have a direct bearing on personal decisions and actions (Mezirow 2003b:58-59). According to Mezirow (1997:6), habits of mind are “broad, abstract, orienting, habitual ways of thinking, feeling, and acting” influenced by assumptions that constitute a set of cultural, social, educational, economic, political, or psychological codes. These habits of mind express themselves in a specific point of view — a combination of beliefs, value judgments, attitudes, and feelings that form an interpretation. *Points of view* consist of particular grouped meaning schemes. Meaning schemes remain subconscious until a person begins to reflect upon them critically (Mezirow 2000:18).

Transformative learning is said to occur when individuals transform their thinking and view of the world through intense, critical reflection upon their environment and learning (Allen 2007:33). Changes in a frame of reference result in a more inclusive, discriminating, self-reflective, and integrative perspective (Mezirow 1997:5). A primary goal of transformative learning is *perspective transformation*,

the process of becoming critically aware of how and why our presuppositions have come to constrain the way we perceive, understand, and feel about our world; of reformulating these assumptions to permit a more inclusive, discriminating, permeable and integrative perspective; and of making decisions or otherwise acting on these new understandings (Mezirow, 1990:14).

If there is no change in frame of reference, then transformative learning has not occurred. Once changed, frames of reference are far more likely to generate beliefs that can be trusted to guide action.

Transformative learning can have far-reaching implications. O’Sullivan (2003:326) noted that structural shifts in basic premises of thought, feelings, and actions influence not only the understanding of self and self-locations, but also relationships with others and the natural world. These shifts in thinking can even alter the understanding of power relationships in structures of class, race, and gender and enhance the “sense of possibilities for social justice and peace and personal joy” (O’Sullivan 2003:326).

3.3.8.1 *The Transformative Learning Process*

Transformative learning can involve instrumental, communicative, and emancipatory learning. *Instrumental learning* takes place through “task-oriented problem solving and determination of cause and effect relationships” (Taylor 1998:5). It focuses on controlling and manipulating the environment in order to improve performance (Mezirow 1997). *Communicative learning* involves how one person communicates feelings, needs, and desires to another person. It entails understanding what someone really means when they communicate and the importance of becoming aware of the assumptions, intentions, and qualifications of the person communicating (Mezirow 2003b:59). It means learning to understand what others mean and making ourselves understood in turn (Mezirow 1991:75). *Emancipatory learning* involves identifying, challenging, and changing distorted meaning perspectives through critical self-reflection, freeing ourselves from “epistemic, institutional, and environmental forces” that limit our options and exercise control over our lives (Mezirow 1991:97-98). Examining assumptions through critical reflection helps to emancipate us from the limitations imposed on us by earlier learning and, instead, to become ‘empowered’ by new understanding(s).

According to Mezirow (2000:19), learning occurs in one of four following ways: elaboration of existing frames of reference, developing new frames of reference, transformation of points of view, and transformation of habits of mind. In transformative learning, taken-for-granted frames of reference — meaning perspectives, habits of mind, and mind-sets — are made “more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action” (Mezirow 2000: 8).

As Cranton (2006:8-9) noted, transformative learning involves both the making of meaning out of life experiences and the ongoing process of questioning the assumptions and habitual expectations derived from previous experience. When people modify habits of mind, they alter their self-perception and reinterpret their relationship to the world. Snyder (2008:165) noted that transformative

learning requires an appropriate context coupled together with a willingness on the part of the learner to engage in self-reflection and critical discourse.

The transformative learning process normally occurs after a 'disorienting dilemma' creates a crisis that a person is unable to resolve through existing problem-solving strategies. "A disorienting dilemma is a life event or crisis that forces individuals to see their world, their relationships, and/or their lives in different and new ways..." (Allen 2007:34). Subsequent self-examination and/or dialogue with others leads to a critical assessment of assumptions. The realization that others have faced and grown through the same issues often facilitates exploration of alternative ideas, roles, relationships, or actions. This, in turn, leads to the formulation of an action plan such as acquisition of new knowledge and skills, experimentation with new roles, a change in relationships, and the development of greater competence or confidence in an area. Once the process is complete, the person moves forward in life with a transformed perspective.

Mezirow (2000:22) listed the stages in the transformative learning process accordingly.

- (1) A disorienting dilemma
- (2) Self-examination with feelings of fear, anger, guilt, or shame
- (3) A critical assessment of assumptions
- (4) Recognition that one's discontent and the process of transformation are shared
- (5) Exploration of options for new roles, relationships, and actions
- (6) Planning a course of action
- (7) Acquiring knowledge and skills for implementing one's plans
- (8) Provisional trying of new roles
- (9) Building competence and self-confidence in new roles and relationships
- (10) A reintegration into one's life on the basis of conditions dictated by one's new perspective

This ten-phase process involves three critical elements: life experience, critical reflection, and development.

3.3.8.2 The Role of Critical Reflection in Transformative Learning

Mezirow and others regard critical reflection as a core practice essential to transformative learning. It is through critical reflection on the assumptions upon which interpretations, beliefs, and habits of mind or points of view are based that frames of reference are transformed (Mezirow 1997:7). Critical reflection helps people assess their own political, economic, social, cultural, and religious viewpoints, creating awareness of how these affect their worldview (Allen 2007:33). Cranton (1996:76) described critical reflection as “moving beyond the acquisition of new knowledge and understanding into questioning existing assumptions, values, and perspectives”. Expounding upon Cranton’s perspective, Stein (2000:1) explained that it is through critical reflection that adults identify assumptions governing their actions, locate historical/cultural origins of these assumptions, question their meanings, and develop alternative ways of acting.

From Brookfield’s (1995:2) perspective, critical reflection involves three interrelated processes:

- Questioning and reframing assumptions that have been uncritically accepted as commonsense wisdom.
- Embracing alternative perspectives on ideas, actions, reasoning, and ideologies that were previously taken for granted.
- Recognition of the “hegemonic aspects of dominant cultural values”.

Brookfield (1988:325) highlighted four elements as essential to critical reflection.

- Assumption analysis — evaluating values, beliefs, cultural practices, and social structures in order to assess their impact on daily life and relationships.
- Contextual awareness — accepting that assumptions are personally and socially created in a historical-cultural context.

- Imaginative speculation — thinking about phenomena in a creative, alternative way in order to challenge predominant ways of knowing and acting.
- Reflective skepticism — a result of the previous three elements, the questioning of claims to universal truth or unexamined patterns of interaction in order to establish truth or viability.

As Mezirow (2000:23) noted, there are two dimensions to ‘reframing’ frames of reference. Objective reframing occurs as we critically reflect on the assumptions of others encountered in a narrative or problem solving situation. Subjective reframing involves critical self-reflection of one’s assumptions regarding narratives, systems (economic, social or educational), organizations, workplaces, feelings, relationships, and even approach to learning.

3.3.8.3 The Role of Discourse in Transformative Learning

Described as “dialogue that involves the assessment of beliefs, feelings, and values”, critical discourse is an integral part of the transformative learning process (Mezirow 2003b:59). According to Mezirow (2000:10-11), discourse, in the context of transformative learning theory, is the specialized use of dialogue to search for a “common understanding and assessment of the justification of an interpretation or belief”. Through the process of active dialogue with others, we more accurately understand the meaning of an experience. In an article devoted to this specific focus, Mezirow (2000:11) wrote, “Reflective discourse involves a critical assessment of assumptions. It leads toward a clearer understanding by tapping collective experience to arrive at a tentative best judgment”. Discourse at this level is often perceived as emotionally threatening. As such, maturity, empathy, active listening, and emotional intelligence are of great value.

3.3.8.4 Relational Transformative Learning

Cranton (2006:98) described relational transformative learning as learning “integrative and holistic ways of seeing the world” through relationships with others. In these relationships, one practices empathetic listening, nurturing, and

care in an effort to understand (and not debate) the viewpoints of others. Those with a strong sense of feelings for others are more likely to experience this type of transformative learning. In relational transformative learning, a person makes a preference for harmony and values-based judgments over logical, analytical judgments.

3.3.8.5 The Spiritual-Affective Realms in Transformative Learning

Mezirow's understanding of transformative learning emphasizes the rational, cognitive processes associated with critical reflection and critical discourse. Taylor (1998:33-34) noted that even though many empirical studies support the central role of rational critical reflection in transformative learning, other researchers have found that critical reflection is overemphasized in perspective transformation. By the late 1990s, transformative learning began to be viewed by some as a more "intuitive, creative, emotional process" (Grabove 1997:90).

Robert Boyd and Gordon Myers, in particular, found Mezirow's rational approach to transformative learning somewhat limiting. They developed a theory focused on deeper emotional and spiritual dimensions of transformative learning (Boyd and Myers 1988). Boyd was interested in integrating these dimensions of learning more holistically and consciously into the experience of daily life and relationships (Dirkx 1998:7). Based on Jung's depth psychology and drawn from research on small groups, Boyd viewed transformation as a "fundamental change in one's personality involving cojointly the resolution of a personal dilemma and the expansion of consciousness resulting in greater personality integration" (Boyd 1989:459). For Boyd, transformative learning is an inner journey of individuation — a coming to understand through reflection the psychic structures that make up a person's sense of identity — through the discovery of talents, a sense of empowerment, the development of confidence, a deep understanding of self (at 'soul' level), and an increasing sense of self-responsibility (Boyd 1991). A major goal of this personal transformative journey is identifying and becoming free of unconscious content and cultural norms and patterns that negatively influence or shape the sense of self, one's interpretations of the external world, and daily actions, all of which can restrict self-actualization (Dirkx 1998:7, 13).

In contrast to Mezirow, Boyd views transformative education as a process of 'discernment', a holistic orientation leading to a personal understanding through which one sees life in a relational wholeness (Taylor 1998:14-15). This process of discernment is composed of three activities — receptivity, recognition, and grieving (Imel 1998). Boyd and Myers (1988:277) explained that an individual first becomes receptive to alternative meanings, then recognizes the authenticity of a message, then experiences grieving with the realization that existing ways of perceiving are no longer relevant. With the grieving, the individual adopts new views or ways, eventually integrating the new and old patterns. Boyd and Myers (1988:275) noted that the process of discernment allows exploration of both the rational (expressed in insights, judgments, and decisions) and the 'extrarational' (expressed through symbols, images, and feelings).

Along the same line, Dirkx also extended transformative learning beyond Mezirow's rational, ego-based approach (Cranton 2006:50). Affirming the importance of soul experiences, he developed a 'mytho-poetic' approach that includes the roles of images, symbols, stories, rituals, myths, and imagination in transformation. As Cranton (2006:50) pointed out, neglecting emotional, spiritual, and imaginative aspects of transformation results in a "limited, fragmented perspective rather than a holistic, whole-person understanding".

Cranton (2006:49) suggested that integrating the various theories would be a positive step toward the development of a more unified and holistic theory of transformative learning.

3.3.8.6 Alternative Streams in Transformative Learning

At present, there are a number of different perspectives on transformative learning (Taylor 2008:7-10). The *psychoanalytic* view of transformative learning relates to the process of individuation, a lifelong journey of coming to understand oneself through reflecting on the psychic structures that make up an individual's identity. The *psychodevelopmental* perspective views transformative learning as incremental, progressive growth across lifetime and focuses on epistemological change. These perspectives focus on the individual; but others have a broader focus.

Brazilian educator Paulo Freire (1972, Schipani 1984) advanced a theory of transformative learning called *conscientization* (consciousness-raising). This *social-emancipatory* approach to learning uses dialog and problem-posing to help learners become aware of societal structures that contribute to inequality and oppression. It encourages people to analyze, question, and act on the social, political, cultural, and economic contexts that negatively affect their lives (Dirkx 1998:2-3). Freire's process, which he labeled *praxis*, involves action and critical reflection⁹ in a dialectical (or transactional) relationship that encourages and empowers people to act together upon their environment in order to bring transformation (Freire and Macedo 1995).

The *neurobiological approach* (Janik 2005, 2007) examines actual changes in the brain and suggests that transformative learning is rooted in the learner's experiences, needs, and interests and requires some sort of discomfort to stimulate 'discovery' of new perspectives. Based upon empirical studies, this perspective posits that transformative learning is not just rationally and consciously driven (as Mezirow proposed), but that extrarational and nonconscious ways of knowing, including the exploration and resolution of feelings, significantly contribute to the revision of meaning structures (Taylor 2001:221). Hence, the neurobiological perspective attempts to address Mezirow's overemphasis on the role critical reflection in transformative learning.

Tisdell (2003:211-218) advanced a *cultural-spiritual* view of transformative learning that offers a culturally relevant and spiritually grounded approach to transformative pedagogy. The goal of this pedagogy is to foster a narrative transformation through group inquiry, the sharing of stories, narrative reasoning, and the revision of stories. Tisdell (2003:136) noted that narrative perspectives bring out particular contextual factors such as gender, historical background, culture, religion, and education, all of which affect the development of identity and purpose.

⁹ Inspired by Freire, Jane Vella considers praxis (action with reflection) a key element in dialogue education. See section 2.3.9.1.

3.3.8.7 A Theory in Progress

As both Mezirow (2000) and Cranton (2006:39) were careful to elucidate, transformative learning theory remains a ‘theory in progress’. Perspectives on transformative learning have continued to develop since Mezirow introduced the concept in 1978. Early criticisms of Mezirow’s theory included the failure to address social change, his neglect of ‘power’ and culture issues, and his virtually exclusive focus on rational processes (Cranton 2006:3). Yet, in response to this, transformative learning theory in general has broadened from Mezirow’s original focus to include the emancipatory perspective of Freire, the affective-spiritual approach of Boyd and Dirkx, and the cultural-spiritual perspective of Tisdell.

3.3.9 Holistic Theory of Knowledge and Adult Learning

In the last decade, Baiyan Yang (2003, 2004, 2006), chairman of Department of Human Resources and Organizational Behavior at Tsinghua University, China, advanced what he terms the ‘holistic theory of knowledge and adult learning’. Unlike most theories that seek to distinguish themselves by their differences, this theory endeavors to identify commonalities and form an integrated theory of learning (Swanson and Holton 2009:202-203). A unique approach, Yang seeks to explain the various interactions among knowledge types. In addition, Yang’s theory addresses learning at individual, group, and organizational levels.

3.3.8.1 Knowledge Facets at Individual Level

Building on the three major approaches to knowledge advanced by Mezirow¹⁰ (1996), Yang (2003:107) posited that ‘knowledge’ is composed of three distinct but interconnected ‘knowledge facets’ — explicit, implicit, and emancipatory (later relabeled conceptual, perceptual, and affectual respectively). These facets of knowledge represent different aspects of how we know the physical, social,

¹⁰ Mezirow (1996) described three major approaches to knowledge: the empirical-analytic paradigm in which knowledge is considered to be objective, the interpretist paradigm which views knowledge as subjective and “constructed from experience within the frame of prior interpretation”, and critical theory which views learning as a transformational, emancipatory process (Yang 2003:107).

emotional, and spiritual world (Yang 2003:108). According to Yang, learning, “the process whereby knowledge is created, acquired, transformed, converted, or utilized in a different context from its origin” (Yang 2003:117), occurs as a result of interactions within and among the knowledge facets. As Yang (2003:111) noted, “these three facets are different not only in nature, function, domain, and approach, but also in carriers, direct sources, evaluation criteria, and ultimate goals”. An examination of the interaction among these three facets of knowledge helps us better understand adult learning.

Yang (2003:108) defined ‘knowledge’ as a human being’s understanding about reality as a result of mental correspondence, personal experience, and emotional affection with outside objects and situations. As Yang (2003:108) noted, this definition implies that knowledge is the outcome of interaction between human beings and the outside world, that it is learned and accumulated through personal and social ‘life experiences’ by means of mental, behavioral, and emotional processes. Both personal inner factors and outside environmental factors shape this knowledge.

Yang (2003:108) described *explicit knowledge* as codified knowledge acquired through logic and reason that can be transmitted in a formal, systematic format and used to distinguish true from false in the reality. Falling in the theoretical realm, this facet includes “theories, models, formulas, principles, textbooks, and journal articles” and is based on that which, by virtue of its empirical soundness, clarity, and consistency, is judged to be “true in the world” (Yang 2003:111). Explicit knowledge tends to focus on truth and efficiency, searching for a single solution — “an action that maximizes its satisfaction or utility” (Yang 2003:111).

In contrast, *implicit (tacit) knowledge* is learning that is not openly expressed or easily articulated. Rooted in accumulated experience and expressing itself in behavior, actions, and routines, this facet of knowledge is personal, context-specific, and hard to formalize (Yang 2004:242). Falling within the domain of practice, implicit knowledge tends to be especially valued among people who learn by doing in authentic situations. This knowledge facet engages with reality and targets effectiveness rooted in artistic rather than scientific solutions. The implicit facet is carried by informal, concrete, and vivid experiences (Yang

**Table 3.7: Holistic Theory of Knowledge and Learning:
Comparison of Three Knowledge Facets**

(adapted from Yang 2003:112)

Characteristics	Knowledge Facets		
	<i>Explicit (Conceptual)</i>	<i>Implicit (Perceptual)</i>	<i>Emancipatory (Affectual)</i>
Nature	Knowledge of rationality (mind)	Knowledge of experience (body)	Knowledge of meaning (heart)
Function	Sequential knowledge (there and then)	Simultaneous knowledge (here and now)	Essential knowledge (where and why)
Domain	Digital knowledge (theory)	Analog knowledge (practice)	Vital knowledge (spirit)
Approach	Separation of object and subject (objective)	Interrelated object and subject (subjective)	Object within subject (affective)
Carriers	Formal, abstract symbols & languages	Informal, concrete, and vivid experiences	Values, conscience, dignity, & ethics
Direct source	Logic, reasoning	Practice, experience	Freedom, justice
Evaluation criteria	Empirically sound, clear, and consistency (true or false)	Workable, practical, communicative (workable or not)	Enlightening, ethical, responsible (right or wrong)
Ability to learn	Analytical intelligence	Practical intelligence	Emotional intelligence
Goal	Truth Efficiency Maximize	Reality Effectiveness Artistic	Liberty Significance Empowering
Problem nature	Structured	Less-structured	Nonstructured
Related theory	Prescriptive	Heuristic	Descriptive
Research tool	Empirical-analytic	Experiential-interpretive	Critical-reflective
Research domain	Cognition (thinking)	Behavior (action)	Affect (emotion)

2003:111). *Emancipatory knowledge* “defines one’s view about what the world should be” and is a “product of one’s efforts to seek freedom from natural and social restraints” (Yang 2004:242). Carried by values, assumptions, and ethics, this facet lies within the domain of the human spirit. Emancipatory knowledge is associated with the pursuit of freedom, justice, and empowerment and is normally evaluated in accordance with “intellectual illumination and ethical responsibility”

(Yang 2003:113). Closely aligned with emotional affection and clearly ‘value-laden’, emancipatory knowledge is often evidenced in the feelings and emotions people experience when engaged with the objects and situations that surround them (Yang 2003:109).

Due to confusion about the meanings of explicit, implicit, and emancipatory knowledge, Yang, Zheng, and Viere (2009:275) later modified this terminology. Explicit became conceptual, implicit became perceptual, and emancipatory became affectual. *Conceptual knowledge* refers to abstract concepts or a scheme of interrelated concepts that may be transferred across situations. *Perceptual knowledge* refers to “personal kinesthetic understanding of the world through direct experience and involvement in a particular situation”. *Affectual knowledge* is described as sentiment attached to particular objects. Knowledge is viewed as an “awareness and understanding about reality gained through personal familiarity, cognitive and mental processing, and emotional affection”.

3.3.8.2 *Knowledge Facets and Layers*

Holistic learning theory asserts that the construct of knowledge consists not only of the three *knowledge facets* but also of three *knowledge layers*: foundation, manifestation, and orientation (Yang 2003:113-114, Yang, Zheng, and Viere 2009:275). Based upon premise or assumption, the foundation layer reveals epistemological beliefs and serves as the “basis of knowing” and the “boundary of explicit knowledge”. The second layer, manifestation, is the outcome of knowing. The third layer is the orientation of knowing and defines the directional tendency of knowing action. The layers of each knowledge facet are explained in the Table 3.8 below.

3.3.8.3 *Relationships Among the Individual Knowledge Facets*

Though differences in the knowledge facets are generally recognized, little emphasis has been placed on understanding the dynamic relationships among them. Yet, as Yang (2003:116) illustrated, no knowledge facet can exist and function independently of the others. Instead, knowledge exists and is created in

“dynamic dialectic interaction” among all three facets (Yang 2006:483). While acknowledging the clear differences, Yang’s holistic theory of knowledge posits that all three facets are present and involved in adult learning processes, though not all of them need to experience change for learning to occur (Yang 2003:110).

Table 3.8: Three Knowledge Facets and Three Knowledge Layers

(Adapted from Yang 2003:115)

Knowledge Layers	Knowledge Facets		
	Explicit	Implicit	Emancipatory
Foundation	Axioms, assumptions, beliefs, hypotheses	Habits, social norms, traditions, routines	Values, aspirations, vision
Manifestation	Theories, principles, models, conceptual frameworks, formulas	Tacit understandings, know-how, intuition, mental models	Attitudes, motivations, learning needs, equity, ethics, moral standards
Orientation	Rational	Practical	Freedom

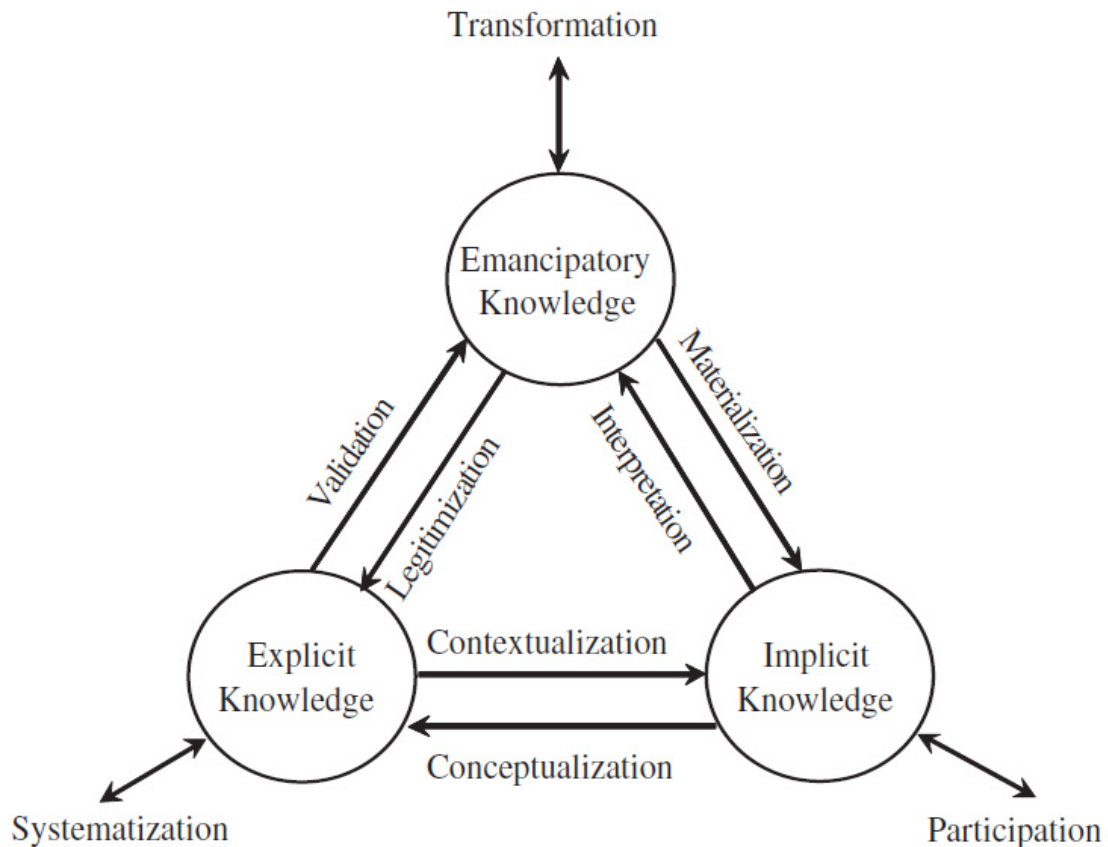
Figure 3:14 illustrates the relationship among the three knowledge facets (Yang (2003:117-118)). The area inside of the triangle is the arena of knowledge, and the legs of the triangle represent interactions among the knowledge facets. The knowledge facets are represented by the circles. Learning may involve one, two, or all three facets. A change in one knowledge facet is always bounded by the other two. Knowledge is created and transformed through the various interactions that occur among the explicit, implicit, and emancipatory knowledge facets. Any given learning situation may involve a number of interactive relationships.

Yang (2003:117) listed a number of knowledge processes that occur in this interaction. ‘Learning’ occurs as knowledge is “created, acquired, transformed, converted, or utilized in a different context from its origin”. ‘Knowledge creation’ occurs when a new understanding (in any facet) is formed about reality. ‘Knowledge acquisition’ occurs when a learner gains knowledge in its original form from another source (such as a lecture or book). In ‘knowledge transformation’, the learning outcome is a new format of knowledge. ‘Knowledge conversion’, which is described in detail in the next paragraph, occurs in the exchange among knowledge facets. Even ‘knowledge utilization’ can be

considered learning when application is made in a different context and a learner gains new understanding about a problem.

Figure 3.14: Dynamic Relationships of Three Knowledge Facets and Implied Modes of Learning

(Yang 2003:118)



In this interaction among the three knowledge facets, Yang (2003:118) identifies nine distinct modes or processes of learning: participation, conceptualization, contextualization, systematization, validation, legitimization, transformation, interpretation, and materialization. Yang (2004:244-245) described these accordingly.

- (1) Participation — learning from practice that creates implicit knowledge from personal experiences.
- (2) Systematization — incorporating explicit conceptions into a system using logic and reasoning.

- (3) Transformation — converting an old meaning scheme (such as values, aspirations, attitudes, feelings, and ethics) into another form.
- (4) Conceptualization — articulating implicit knowledge into explicit concepts, developing tangible explanations by proposing new concepts or theories.
- (5) Contextualization — embodying explicit knowledge into implicit knowledge, applying concepts, models, formulas, principles, and propositions in a specific context.
- (6) Validation — examining and possibly modifying underlying values, desires, judgments, perceived importance and worth, and other kinds of fundamental learning based on explicit knowledge.
- (7) Legitimization — justifying explicit knowledge based on emancipatory knowledge.
- (8) Materialization — transferring emancipatory knowledge into tacit knowledge.
- (9) Interpretation — making a meaning scheme from tacit learning and direct experiences.

3.3.8.4 Knowledge Interaction and Learning at Organizational Level

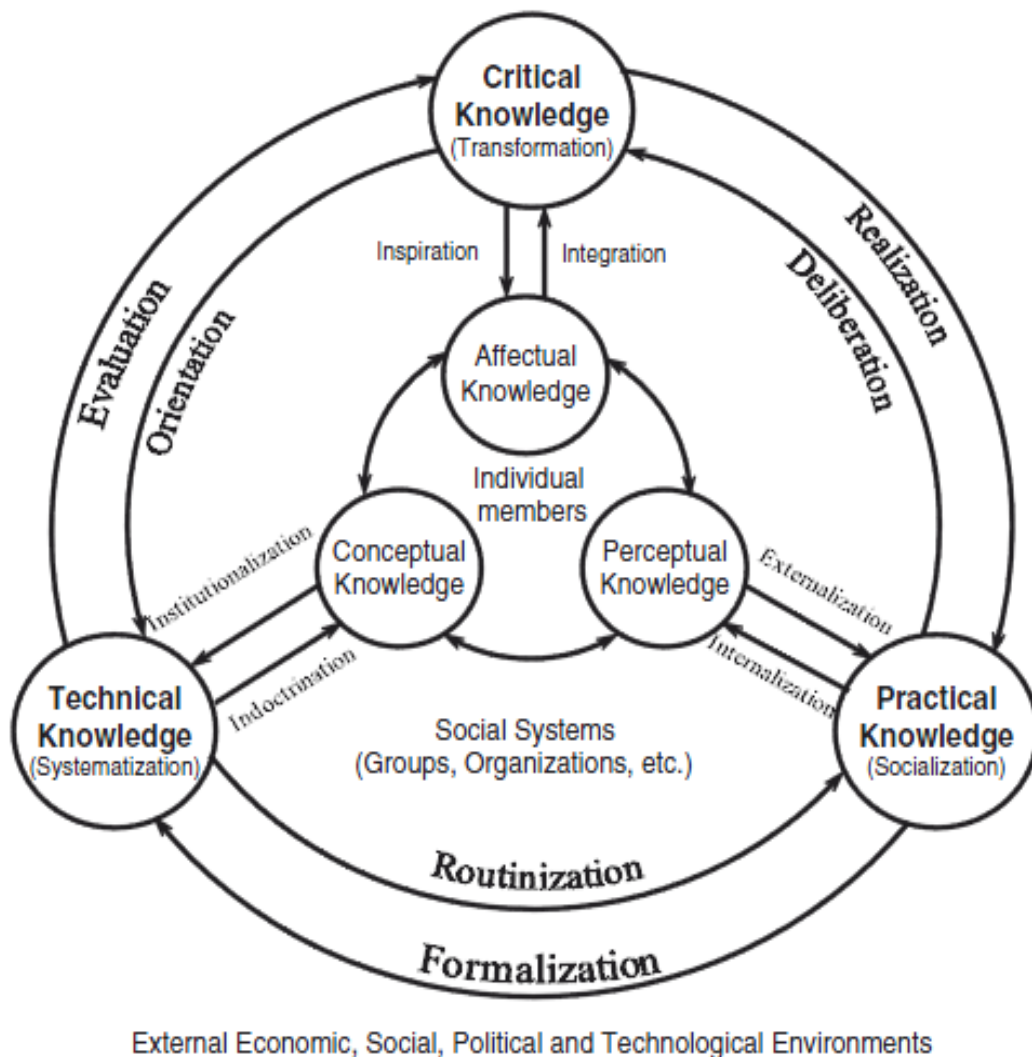
Because much human learning occurs in a social context, Yang (2003:121-125) extended the holistic learning model to include this important dimension. Figure 3.15 provides a conceptual overview of the interactive learning relationships between individual and social/cultural contexts. The framework includes two circles, with the inner circle representing individual learning and the outer circle representing interrelationships among the facets of knowledge that characterize social groups or organizations. The lines between the individual knowledge facets and the group/organizational facets depict the dynamic interaction between individual knowledge and the dominant knowledge of the group to which the individual belongs.

In order to function effectively, a group or organization needs three facets of knowledge: critical knowledge, technical knowledge, and practical knowledge (Yang 2003:122-123, 2004:245). *Critical knowledge* consists of the total emancipatory knowledge of group members. This reflects the shared

preferences, vision, and values of members. *Practical knowledge* includes the sum of the members' implicit knowledge and is evidenced in organizational processes and practices. *Technical knowledge* represents those concepts and principles that have been incorporated into the organizational systems and structures and are believed by members to be true explicit knowledge. Thus, organizational knowledge finds its expression in the collective understandings of members in institutionalized explicit knowledge, shared implicit knowledge, and dominant emancipatory knowledge (Yang 2004:245).

Figure 3.15 Dynamic Interactions Among the Knowledge Facets at Individual and Social Levels

(Yang et al. 2009:278)



In the holistic theory of knowledge and adult learning, group/organizational learning is defined

as a process of change in the dimensions of collective belief (i.e., technical knowledge or shared explicit knowledge), social norms (i.e., practical knowledge or prevalent implicit knowledge), and shared values (i.e., critical knowledge or dominant emancipatory knowledge) among group members (Yang 2003:123).

As such, organizational learning is reflected when technical, social, and/or political dimensions of the organization are changed.

Group/organizational learning involves both epistemological and ontological dimensions. Yang et al. (2009:278-279) described nine processes in the epistemological realm and six in the ontological. Learning processes in the epistemological dimension include socialization, systematization, transformation, formalization and routinization, evaluation and orientation, and deliberation and realization.

Socialization involves the creation of new practical knowledge from actual experience by organizational members in order to become fully participating and effective members in a community of practice. Systematization occurs as technical knowledge gained from organizational members is compiled into a system with explicit rules and systems. Transformation takes place as an organization's values and visions change and move it toward increasing internal productivity and social responsibility.

The interaction among group knowledge facets is as follows (Yang et al. 2009:278-279). Formalization involves the articulation, transfer, and formalization of practical knowledge into a structured organizational system governed by formal rules and procedures. Intangible knowledge is converted into tangible explanations as practical knowledge is embedded into new rules, systems, or structures. On the other hand, routinization is an implementation process. Technical knowledge is converted into practical knowledge in such a way that explicit rules and requirements become regular and conventional procedures in specific contexts. Evaluation occurs as organizational members progress from

technical to critical knowledge, determining values and guiding principles through reason, shared rules, and structures. Orientation is the process of justifying of organizational rules and regulations based on the members' values and guiding principles. Deliberation forms collective meanings and beliefs based upon the actual experience of the organization's members. Realization occurs as organizational values are tested by practical knowledge.

Table 3.9: The Holistic Theory of Organizational Knowledge

(adapted from Yang et al. 2009:276)

Knowledge Layers	Knowledge Facets		
	Technical	Practical	Critical
Foundation	Institutionalized Conceptual (Explicit) Knowledge (Systems and Structures)	Collective Perceptual (Implicit) Knowledge (Processes and Practices)	Dominated Affectual (Emancipatory) Knowledge (Values and Vision)
Manifestation	Rules, regulations, policies, standard operating procedures, technical specifications, formal communication channels and formats	Shared experiences, social norms, customs, conventions, shared understandings, intuitions, insights, routines, technical know-how	Mission awareness, Managerial philosophies, sense of social responsibilities, morale, ethical and moral standards, and spirituality
Orientation	Rationality (reflected as efficiency and optimization)	Reality (reflected as effectiveness and flexibility)	Liberty (reflected as productivity and responsibility)

The six processes in the ontological dimension are institutionalization and indoctrination, externalization and internalization, and inspiration and integration (Yang et al 2009:278-279). They describe interaction between individual and group knowledge facets. Institutionalization establishes action guidelines for daily activities by making the effective conceptual knowledge of individual members part of the structured organizational system. On the other hand, the process of indoctrination conveys formal requirements and regulations to organizational members. Externalization converts the implicit knowledge of individuals into practical knowledge shared among members in a community of practice. In contrast, internalization occurs as practical knowledge becomes

usable by organizational members. A process originating in the organization's critical knowledge, inspiration unites members by shaping and aligning values, visions, and aspirations. Integration occurs as members share and mutually adjust to each other's attitudes, values, visions, and aspirations.

3.3.8.5 A Noble Effort in Need of Empirical Support

Positing that knowledge is a multi-faceted social construct, Yang's holistic learning theory represents a noble attempt to integrate various learning theories and develop a comprehensive model of adult learning. Noteworthy in its adaptation of Mezirow's (1996) three major views on knowledge and learning, and incorporating cognitive, affective, psychomotor, and social aspects of learning, Yang's model portrays learning at both individual and organizational levels as a process of dynamic interaction among the knowledge facets and layers. It is the contention of Yang (2006:488) that holistic learning theory provides a satisfactory explanation of many of the propositions and concepts found in adult learning literature. Hopefully, future empirical studies will provide further insight into the validity of Yang's claims.

3.4 Conclusion — Best Practices in Adult Learning

This review has explored a number of key theories in the fields of adult learning and education. The concluding section will briefly consider the concept of evidence-based practice, best practices suggested by leaders in the field, and perspectives from the various learning theories that might contribute toward the development of a set of recommended practices for transformational leadership development in the South African church.

3.4.1 Evidence-based Educational Practice

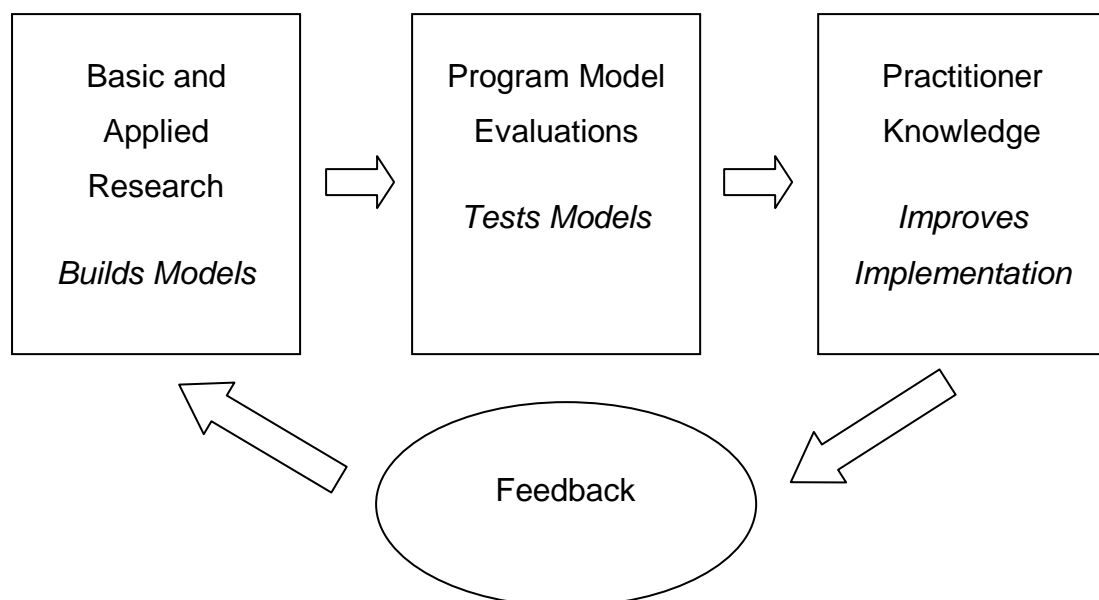
Though some adult education practitioners base their decisions on empirically supported theories of adult learning, most simply rely on tradition, the opinions of more experienced practitioners, and/or personal insight garnered through trial and error (Comings 2003:1, Beder and Medina 2001). Both theory-based and

experience-based approaches can result in effective learning; but many of the models that develop out of these approaches lack empirical support for their effectiveness.

It has been suggested that evidence-based educational practice can significantly improve the effectiveness of adult learning. In the context of education, evidence-based practice is defined as “the integration of professional wisdom with the best available empirical evidence in making decisions about how to deliver instruction” (Comings 2003:2). Professional wisdom develops as practitioners work with learners, analyze data, and apply research findings in their programs. Empirical evidence is gathered through well-designed, rigorous studies developed by researchers. Integrated, these provide the best guidance available for adult education programs.

Figure 3.16: An Evidence-based Adult Education System

(Comings 2003:3)



According to Comings (2003:3-8), an evidence-based adult education system requires three components working together in a continuous cycle to improve program models (see Figure 3.16). ‘Basic and applied research’ collects evidence needed to build program models. ‘Program model evaluation’ evaluates the effectiveness of these program models. ‘Practitioner knowledge’ increases the

effectiveness of program model implementation. Comings (2003:11) warned that unless outcomes are clear and evaluation tools appropriate, the validity of research findings is questionable.

As Comings (2003:3) noted, collaboration among researchers and practitioners is essential if an evidence-based adult education system is to be successful. Common vision and mutual respect are most effective in promoting the high level of collaboration required.

3.4.2 Suggested Best Practices in Adult Learning

Best practices for adult learning have been proposed by a number of scholars and practitioners. Many of these are based upon the assumptions of Knowles' andragogy and, as such, still lack clear empirical support.

Brookfield (1991:9-11) identified a number of practices that facilitate effective adult learning in teaching-learning transactions and curriculum development. Brookfield noted that adults prefer to participate in learning processes by choice. Even if external circumstances compel the adult learner, participation is by their own volition. This has implications for adult educators. Since adults are often highly motivated to learn, facilitators need to invest a high level of effort and ingenuity as they design educational experiences and teach. Because adults often have a strong desire to learn, they are usually quite willing to participate in group and collaborative learning experiences. However, adult learners also tend to withdraw if a learning activity fails to engage them at an appropriate level or does not meet their needs or expectations (Brookfield 1991:11-12).

As one would expect in a voluntary process, adult learning is characterized by mutual respect among the learners and facilitators/teachers. Acknowledging the accumulated experiences of adults as valuable educational resources is especially important. Failure to honor this practice will discourage learning and even motivate participants to withdraw (Brookfield 1991:12-13).

In addition, the adult learning process is often collaborative in nature. "The existence of some kind of participatory and collaborative element is perhaps the

most frequently cited difference between school education and the education of adults” ((Brookfield 1991:14). Collaborative exercises must be appropriately structured and supervised to ensure that adult learners can fully participate in an environment of safety and respect.

Also central to the adult learning process is praxis, which means ‘action with reflection’. Educators understand that ‘doing’ plays a major role in the learning of concepts, skills, and attitudes. Praxis is essentially doing with built-in reflection. Vella (2002:14) noted that praxis can be used to teach knowledge, skills, and attitudes. Learners do something with new knowledge, practice new skills and attitudes, and reflect on what they have done. Critical reflection, in particular, plays an especially important role adult learning (Brookfield 1991:10).

Brookfield also emphasized the importance of nurturing self-direction and a sense of empowerment in the adult learner (Brookfield 1991:11). Adult education needs to move away from the dependency so characteristic in school-based learning.

Billington (1996) conducted research on the importance of the learning environment for adult learning. Her findings reinforce those of Brookfield and Vella. Billington noted significant growth among adult learners in learning programs characterized by the following factors.

- A safe and supportive environment where individual needs are recognized, uniqueness is honored, and abilities and life achievements are acknowledged and respected.
- An environment characterized by intellectual freedom, experimentation, and creativity.
- An environment in which adult students are treated by teachers and facilitators as peers, where opinions and contributions are valued and appreciated.
- Self-directed learning, where students take responsibility for their own learning and work closely with faculty to design individual learning programs which address what each learner needs to learn in order to function more effectively in their profession.

- Optimal pacing that challenges learners just beyond their present level of ability.¹¹
- Active involvement in learning, including interaction and dialogue, experimentation with new ideas in authentic situations, and exercises and experiences that bolster facts and theory.
- Feedback mechanisms that enable students to inform faculty what works best for them and what they want and need to learn.
- Teachers/facilitators who make changes based on student input.

3.4.3 Gleaning from the Various Theories

Adult learners are viewed as uniquely different from young learners; and adult teaching and training processes generally prove to be more effective when these differences are recognized. The adult learning theories and models considered in this review represent a cross-section of prominent perspectives on this important subject. Though no single theory can account for the complexities of learning, it is possible to glean from each some measure of insight into particular aspects of adult learning.

Behaviorism focuses on observable behavior and largely ignores the cognitive and affective processes. Nonetheless, the behavioral practice of reinforcement has proven to be effective in enhancing behavioral change and could prove valuable in many learning situations. Born out of the cognitive revolution of the 1950s, cognitivism maintains that human learning occurs as events, experiences, and new information are integrated into an active, organized storage system in the mind. Cognitivism emphasizes the importance of meaningful learning, categorization, and information processing. Instructors and curriculum designers can benefit from an understanding of the workings of human memory, especially in regard to its limitations. Social cognitive theory considers the three-way interplay between cognitive/personal factors, behavior, and the environment and

¹¹ In keeping with Vygotsky's 'zone of proximal development'. See section 3.3.6.4.

recognizes the important role that social interaction and modeling play in learning.

Unlike the three theories above, andragogy specifically focuses on the adult learner, highlighting their 'need to know' (the why, what, and how), their sense of autonomy and desire for self-direction, the importance of prior experience, the connection between relevance and readiness to learn, the value of problem-centered learning, and the intrinsic motivation of adult learners. Though not yet validated from an empirical perspective, practitioners see great benefit in the application of Knowles' principles in adult learning situations.

The concept of multiple intelligences also focuses on the nature of the learner. This theory posits that human beings have many intelligences and that effective learning methodologies recognize and cater for these various intelligences. Also lacking in empirical support, this concept, nonetheless, has attracted great interest from the educational community. Though one may not fully embrace its tenets, this theory does encourage educators to be mindful of the uniqueness of each learner.

As the name implies, experiential learning emphasizes the iterative role of experience in learning. From the experiential learning cycle, the concept of personal learning styles was developed. In spite of the popularity of learning style instruments, their validity is still subject to question. Nonetheless, it cannot be denied that experience is fundamental to learning. Jesus himself used an experiential learning approach to develop his disciples.¹²

A theory of knowing and learning, and a response to the objectivism of behaviorism, constructivism asserts that human beings construct their own meaning and cannot know reality in an objective sense. Though aspects of this theory remain controversial due to their epistemological implications, the importance of activity in learning, social interaction, and the personal construction of meaning have left a huge mark on the field of adult learning.

¹² Malcolm Webber (2008a:9-10) views experiential learning as one of the four key dynamics of transformation in Jesus' approach to leader development. See section 5.3.3.4.

Also focused on the making of meaning, transformative learning occurs when a learner's previously assimilated assumptions, beliefs, values, and perspectives are critically assessed and become more open, permeable, and better justified. Very much a theory in development, transformative learning is now being applied in a way that closely resembles learning methodologies evident in scripture.¹³ As such, it could easily be applied in the development of a leadership development process for the local church.

Holistic learning theory recognizes the 'whole life' nature of learning and the importance of the interconnectedness of explicit, implicit, and emancipatory knowledge at both individual and social levels. Instead of focusing on a specific element or process in learning, this theory seeks to integrate aspects from many theories in an attempt to better explain and guide adult learning. Though this theory awaits empirical validation, the 'whole life' perspective it represents seems to align with biblical perspectives on discipleship and leadership development.

Chapter four explores leadership development in the New Testament, with a specific focus on the developmental approaches of Jesus and Paul, and the transformational role of the Holy Spirit. Even a cursory overview of the strategy used by Jesus and Paul reveals a profound knowledge of the adult learner and a keen awareness of principles and practices which facilitate 'good learning'. That such learning principles have only been recently formalized into theory makes the study of Jesus' approach to leader development all the more fascinating. It is not without reason that Jesus is called the 'Master Teacher'.

¹³ The transformative nature of leadership development in the New Testament is discussed in chapter four.

Chapter Four

Leadership Development in the New Testament

4.1 Introduction

The previous two chapters examined the fields of instructional design and adult learning theory in order to help identify effective practices for the design and implementation of transformational leadership development practices in South African churches. This chapter examines scripture and reviews literature by scholars and practitioners on the developmental teaching and training approaches of the Lord Jesus and the apostle Paul, the role of the Holy Spirit in leadership development, and the nature of biblical transformation.

The life and ministry of Jesus were divinely directed. Everything he did was 'on purpose'. As one who ordered his life in accordance with the Father's objectives, operated in the Holy Spirit, and accomplished all that he was given to do, Jesus stands as the perfect example of 'kingdom life' and priorities. While many studies have examined our Lord's incarnation, life, teachings, miracles, and atoning sacrifice, in this chapter we will study Jesus as the master of leadership development.

During his short time of ministry on earth, Jesus devoted significant effort to the development of the Church's first leaders. The perfect model, worthy of imitation, the Lord Jesus can teach us much about leadership development. If local

churches are to be faithful and effective in raising up emerging leaders, then we must learn from the perspectives, priorities, strategies, and methods of Jesus (Coleman 1964:18). Should the Lord Jesus be deemed too difficult or unique to be emulated, we can also learn from his handpicked bondservant, the apostle Paul, whose leadership model in the apostolic era facilitated the development of many leaders in the early church.

4.2 The Biblical Mandates

On the evening of his resurrection, almost immediately after appearing to his astonished disciples, Jesus commissioned them saying, “As the Father has sent Me, I also send you” (John 20:21). In recording this important injunction, the writer John used two different Greek words for ‘send’. “As the Father sent me” uses ἀποστέλλω, a composite verb meaning ‘to send away’ or ‘to order (one) to go to a place appointed’ (Thayer and Smith 1999). Related to ἀπόστολος (apostle), this verb is used to specify sending out for a particular purpose or special mission. Written in the perfect active indicative, the verb indicates that the resurrected Jesus still carries his Father’s commission (Robertson 1932:315). When Jesus commissioned his disciples in turn, he used a different verb — πέμπω. According to Zodhiates (1993), there is a significant relationship between these two verbs. In the New Testament, ἀποστέλλω appears as a technical term that denotes divine authorization; and πέμπω occurs as a virtual synonym. The verb πέμπω was more common in secular usage and stressed the fact of the sending, whereas ἀποστέλλω stressed the purpose of the sending. Still intent on his Father’s purpose, Jesus commissioned his disciples to carry on with his mission. It was for this they had been trained. The one who had come representing his Father was now sending them to represent him!

In one way a beginning, Jesus’ commission on that amazing evening was also a culmination. Just three years earlier, Jesus had recruited these men to be his disciples. They had no idea what their future held. For three years, they traveled with Jesus, undergoing increasingly intense training and development. Just when it seemed Jesus would be king, disaster struck. Jesus was betrayed, arrested, crucified, and buried. Their hopes and dreams were shattered. As

these forlorn disciples secretly met to discuss the way forward, stories began to trickle in about Jesus being alive. Peter and John ran to the tomb and found it empty. Confusion and doubt prevailed until ... suddenly, there he was, right in the midst of them! After greeting his dumbfounded disciples, Jesus wasted no time. He had trained these men for a reason. That night, those he had named as 'apostles' were to become apostles indeed!

In the life of Jesus and the early church, the mandate for leadership development was driven by the redemptive purposes of God. As the representative of the Father, Jesus felt great compassion for people. However, instead of enjoying the kingdom of God he proclaimed, the people of the land "were distressed and dispirited like sheep without a shepherd" (Matthew 9:36). From early in his earthly ministry, Jesus sought to raise up a group of spiritual leaders "who could serve as catalysts for the release of people's latent spiritual capacity for the things of God", leaders who would partner in his mission and one day lead his Church (Krallmann 2002:49). Encapsulated in a straightforward injunction to a small group of fishermen on the Galilee shore, the plan of Jesus was relatively simple. "Follow Me, and I will make you fishers of men" (Matthew 4:19). From that day forward, the Lord invested an ever-increasing amount of his limited time on earth developing a core group of disciples into spiritual leaders. However, only after his chosen disciples had experienced the transformational impact of Jesus' discipleship process and the outpouring of the Spirit would they be prepared to embrace their mission of making disciples among all peoples (Gibbs 2005:42).

Jesus' post-resurrection instructions to his disciples are paralleled in the other gospels. In Matthew 28:18-20, commonly called the 'Great Commission', Jesus enjoined his disciples saying:

All authority has been given to Me in heaven and on earth. Go therefore and make disciples of all the nations, baptizing them in the name of the Father and the Son and the Holy Spirit, teaching them to observe all that I commanded you; and lo, I am with you always, even to the end of the age (Matthew 28:18-20).

As Kvalbein (1988:48) observed, Jesus included in this commission a declaration of his authority (ἐξουσία), an objective and means of fulfillment, and a wonderful

promise. As the resurrected Lord holding all authority, Jesus issued his followers an imperative — “make disciples” (μαθητεύσατε). This is not a call to make converts! The verb μαθητεύω speaks of a maturing process, as the rest of the charge makes clear (Freeman 1997:17). Elsewhere Jesus had commanded them to take the good news to the world. However, in this instruction, disciple-making was the primary goal, and going, baptizing, and teaching were the means by which this goal was to be realized (Kvalbein 1988:48). Jesus left little doubt about what making disciples entails; “discipling means teaching persons to observe that which Jesus has commanded” (Freeman 1997:17).

The only true imperative in the Great Commission is “make disciples”. This imperative is supported by three participles: “go” (going), “baptizing”, and “teaching”. There is some debate about the participle translated “go” in most English translations. Culver (1968:118-124) noted that a number of scholars suggest translating this participle as ‘going’, ‘as you go’, or ‘having gone’. Yet, Rogers (1973:260-261) demonstrated from other passages with a similar construction¹⁴ that a participle followed by an imperative can carry the force of an imperative. Smith (2012) noted that this rather nuanced Greek construction is without an English equivalent. With the emphasis on the main verb “make disciples”, the “go” participle functions as a facilitating action, enabling the performance of the main verb. Thus, the participle is a command, but only by association with the imperative. Lest this argument distract the reader from the main point, Culver (1968:124) commented,

Believers in Christ have both precedent and encouragement in other texts of the New Testament to go where Christ has not been named to declare his saving power, but the point of the Great Commission is that wherever they are they are, they are to be carrying it out — making disciples. The commission is to make disciples of men of *any* nation as well as *all* the nations.

¹⁴ In Matthew 2:8, Herod tells the magi to “go (pareuthentes) and search diligently (exetasate) for the child.” Obviously the participle “go” has the force of an imperative. The same construction is found in Matthew 2:13 and 17:27.

Plummer (2010:4) expanded upon the 'going, baptizing, and teaching' process of making disciples. First, the apostles had to exercise the initiative to go (Matthew 28:19). Obedience to Jesus required direct contact with persons of cultures and nationalities outside that to which they were accustomed. Second, the apostles were to "bring persons to the point where they knowingly and publicly align themselves with Jesus Christ" by being baptized (Matthew 28:19). According to Culver (1968:125), "Baptism appears as the normal mode of initial confession of Christ together with his Father and the Holy Ghost, and of acknowledging their Lordship". Plummer noted that baptism "in the name of the Father and of the Son and of the Holy Spirit" implied that a person had willingly entered into a relationship with God as Father, Son, and Holy Spirit. In addition to baptizing converts, the apostles were to teach those who had responded to obey everything that Jesus had commanded (Matthew 28:20), obviously including this commission. As Freeman (1997:17) noted, this last stage is fundamental. If the disciple-making process is to multiply into subsequent generations, all that Jesus taught must be passed from disciple-maker to 'disciple-maker in training' in a never-ending cycle until Jesus returns.

The strategy outlined by Jesus envisioned the disciples applying in ever-expanding cultural and national circles the very same developmental strategy that he had employed with them. Not only were his followers to proclaim the good news about Jesus and the kingdom of God, they were to 'reproduce', to disciple others to the point of becoming disciple-makers themselves, as Jesus had done with them. This process would involve going to new places, engaging other cultures, baptizing new believers, and teaching new disciples to guard, watch over, and attend carefully to everything that Jesus had commanded. Those who obeyed this commission were assured of His enabling presence with them. The 'Immanuel' (meaning 'God with us') of Matthew 1:23 would continue to be with them right to the end (Freeman 1997:20).

Freeman (1997:19-20) noted with interest all of the 'all's in Matthew 28:18-20. All authority in heaven and earth has been entrusted to Jesus. Therefore, they are to make disciples of all peoples, teaching them to keep all he commanded. As his

disciples pursue the fulfillment of this commission, Jesus promises to be with them 'all days,' right until the end of the age.

Though relatively uncommon in today's world, discipleship was a well-known practice in New Testament times. The term 'disciple' (μαθητής) meant learner, student, apprentice, or adherent; and the goal of a disciple was to become like the teacher (Kvalbein 1988:49-52). In the Jewish rabbinical tradition, potential disciples sought to be admitted to rabbinical schools. The schools of Shammai and Hillel were the primary sources of religious thought in New Testament times, with Shammai being the more conservative (Young 2007). Each of these schools taught a particular interpretation of the Torah, as well as a number of traditions. A rabbi's hope was that his disciples would eventually become teachers themselves.

Though similar in many ways to the rabbinic method, the relationship between Jesus and his disciples was and still is unique (Kvalbain 1988:49). Jesus, as the resurrected Lord, remains the ultimate Teacher and Master; and a disciple of Jesus Christ will always remain a disciple. Jesus' position and full authority can never really be transferred to any human being. Nonetheless, as in normal rabbinical schools, the disciples of Jesus were expected to learn from him by carefully listening to his words, grasping their meaning and implications, and doing what he did. They were to imitate and become like him in character and practice. Moreover, the call to be a disciple of Jesus meant voluntarily subjecting all other priorities to the will of the Master. Consecration and obedience were essential (Coleman 1964:50-60). Most importantly, Jesus expected his disciples to become disciple-makers themselves.

As is evident in both his life and teaching, the apostle Paul was also committed to this developmental mandate. Though somewhat neglected by the academic world as a developer of leaders (Ascough and Cotton 2006:1011), Paul is exemplary in his commitment to the development of God's people. Writing to the Colossian church, Paul explained that the ultimate purpose of his hard work in the Spirit's power was to present every person 'complete' in Christ (Colossians 1:28). The word translated 'complete' is τέλειος, which speaks of reaching a desired end, having attained an end or purpose, lacking nothing in completeness,

and being fully developed and mature (Arndt and Gingrich 1957:816-817). Paul had a clear ministry goal. He strove to see people become mature and fully developed in Christ.

Like Jesus, Paul built a team of close associates and invested heavily in emerging and less experienced leaders. Appointed by the Lord to be a preacher (κῆρυξ), apostle (ἀπόστολος), and teacher (διδάσκαλος) of the Gentiles (see 1 Timothy 2:7 and 2 Timothy 1:11), Paul understood that he and all other gifted leaders were entrusted with a stewardship that required them to build wisely and effectively into people's lives (1 Corinthians 3:10-15).

Though focusing primarily on Gentiles, Paul's stewardship required investment in the development of others as the Lord Jesus had modeled and commanded. Writing to the Ephesians, Paul explained that Jesus, as head of the Church,

gave some as apostles, and some as prophets, and some as evangelists, and some as pastors and teachers, for the equipping of the saints for the work of service, to the building up of the body of Christ; until we all attain to the unity of the faith, and of the knowledge of the Son of God, to a mature man, to the measure of the stature which belongs to the fullness of Christ (Ephesians 4:11-13).

These leaders are not to build great ministries around their gifting. Rather, these gifted people are given to the church to equip God's people for ministry to others, with the objective of edifying (building up) the body of Christ. The word 'equipping' is from καταρτισμός and denotes the process of preparing, equipping for service, training, or making ready (Wuest 1953:101, Zodhiates 1993). As Renner (2002) noted, "Christian leaders are given to the Church by Jesus, the Risen Lord, in order to transform every other Christian into a bold, Spirit-empowered minister. Leaders make leaders." Thus, 'ministry' is not the privilege of the few, but the responsibility of the many; and developing the many is the responsibility of leaders who work together with the Holy Spirit to accomplish God's purposes. As this passage indicates, the responsibility of gifted leaders to equip God's people for ministry is to continue until the whole Church arrives at a 'destination' characterized by unity of the faith, a more complete and experiential

knowledge of the Lord Jesus Christ, and a corporate maturity that matches Christ's full stature.

That Paul understood this mandate to be multigenerational is indicated by his late-life instructions to Timothy. "The things which you have heard from me in the presence of many witnesses, entrust these to faithful men who will be able to teach others also" (2 Timothy 2:2). Paul had invested in Timothy; and Timothy was to invest in faithful people who, in turn, could be trusted to continue the cycle by investing in others.

Forman, Jones, and Miller (2004:44-45) highlighted a number of characteristics that were common to the leadership development strategies employed by Jesus and Paul. Both drew a small group of key followers around them and invested heavily in their lives over an extended period of time, traveling and working together as a team. Ogden (2003:62) went so far as to assert that both Jesus and Paul "staked their fruitfulness on intentional, relational investment in a few". The relationships, sense of community, and 'life-on-life' experience this facilitated were fundamental to the developmental process. Equally important was the learning environment. This developmental process took place in the context of actual ministry, providing time for reflection, character development, doctrinal understanding, and growth in ministry competence. Moreover, for both Jesus and Paul, especially at the beginning of the process, character and obedience were regarded as far more important than knowledge and skill.

In the New Testament, the ultimate purpose of leadership development went beyond the development of church or organizational leaders. In the life and ministry of Jesus, and in the early church, leadership training was missional in nature. In alignment with the commissions of Jesus, leaders were raised up by God and developed through a process of discipleship under the supervision of mature spiritual leaders in order to fulfill God's purposes for his people and the world.

As Krallmann (2002:15) noted,

The Master... mentored for mission. He whom the Father had sent as a missionary into the world instilled in his associates a global

vision, entrusted them with the commission to be his representatives to all the world and promised the Holy Spirit's enabling for the accomplishment of this task.

4.3 The Developmental Methodologies of Jesus and Paul

Both Jesus and Paul were committed to the development of leaders. This section examines the strategies and methodologies they employed to achieve this end.

4.3.1 Jesus — Model Teacher and Trainer

As the New Testament portrays, the Lord Jesus Christ serves as the supreme example of a teacher and trainer (Burton 2000:2-4). After prayerfully selecting his core disciples, Jesus prepared his chosen representatives for the apostolic leadership task ahead by offering himself as a model (Matthew 11:29, John 13:12-17), teaching on important leadership issues (Mark 10:42-45, Luke 16:10-12, John 21:15-18), and providing opportunities to apply learning in an authentic context (Luke 9:1-6,10; Luke 12:1-12, 16-17). In contrast to many contemporary approaches to ministerial training, Jesus taught first and foremost by example. He intentionally offered himself as a model to be imitated.¹⁵ In addition, unlike the classroom-centered approach so common today, Jesus conducted most of his teaching and training in the context of real life, guaranteeing a sense of immediacy and relevance in all that he did.¹⁶ As one would expect, Jesus used his supernatural understanding of the nature of humankind to teach with great effectiveness. What made Jesus so effective was not just what he taught, but how he taught (Stein 1994:8). Jesus employed sound educational principles and a variety of methods, all designed to challenge assumptions and to promote

¹⁵ Evident in the developmental approach of Jesus are modeling, mentoring, apprenticeship, and feedback, all strategies consistent with social learning theory (3.3.3) and social constructivism (3.3.6.4). Modeling in the New Testament is examined in section 4.3.5.

¹⁶ Vella views immediacy and relevance as important principles of adult learning. Her very helpful 'twelve principles of effective adult learning' can be found in section 2.3.9.1.

authentic learning.¹⁷ Yet, Jesus did not just focus on the communication of conceptual truth; he addressed the needs of individuals. It was his desire that truth be applied and become ‘personalized’ in the lives of people, addressing specific needs and ‘misbeliefs’.¹⁸

Ultimately, ‘education’ was not the goal of Jesus’ training. Rather, in line with His the Father’s purposes, Jesus sought to produce ‘reproducers’. This was his developmental goal; and this goal undoubtedly influenced his strategy. In Jesus’ relationship with the Twelve, we see what today are commonly called apprenticeship, mentoring, coaching, and leadership training. As Krallmann (2002:14) noted, at least among his twelve handpicked disciples, Jesus drew no apparent distinction between discipleship and leadership development. As the disciples learned to follow, they also learned to lead. In Jesus’ training of the Twelve, we have “once for all the consummate and normative paradigm for Christian leadership development” (Krallmann 2002:14). For those seeking to develop Christian leaders, Chandapilla (1974:x) states it well. “The method of training and producing Christian leaders is first to understand the method of Christ and then to put it into faithful and productive practice”.

4.3.2 An Overview of the Developmental Strategy of Jesus

The Lord Jesus “desired not only to have disciples, but to have about him men who he might train to make disciples of others” (Bruce 1971:5). Building leaders was one of the primary objectives of Jesus’ earthly ministry (Webber 2008a:6). From the earliest stages in his ministry, he began to gather around himself a group of disciples to prepare them to carry on as disciple-makers and leaders after his departure. Early in the ministry of Jesus, his call to Peter, Andrew, James, and John on the shore of the Sea of Galilee clearly indicated his intent. “Follow Me, and I will make you fishers of men” (Matthew 4:19). Not too long after

¹⁷ Jesus’ developmental approach was transformative in nature. See section 3.3.8 for more information on transformative learning.

¹⁸ The construction of personal meaning is a fundamental aspect of constructivist approaches to learning. Constructivist strategies are discussed in sections 2.3.7 through 2.3.9 and 3.3.6.

this, Jesus prayerfully selected twelve of his disciples to be with him on a permanent basis and to participate in his ministry. The gospel of Mark tells us, “And He appointed twelve, so that they would be with Him and that He could send them out to preach, and to have authority to cast out the demons” (Mark 3:14-15). Jesus summed up his developmental goal in Matthew 10:25, where he told the disciples, “It is enough for the disciple that he become like his teacher, and the slave like his master”. They were to become like him. Coleman (1964:21) stressed that Jesus’ chosen method of spreading the message of the kingdom was people; and his initial objective was to enlist men who could “bear witness to his life and carry on his work after he returned to the Father”. Unbeknown to these chosen followers, they were destined to become the leaders of a movement that would take the gospel to the whole world.

Malphurs and Mancini (2004:63-73) condensed the leadership development strategy of Jesus into four major processes. Initially, Jesus sought to attract followers, welcoming those who showed interest (such as Andrew) and approaching others (such as Philip) directly. These interactions served as an initial ‘recruiting’ process for Jesus. The enthusiastic response of men like Andrew and Philip, who approached others and gained their interest, enhanced the process. As the number of disciples accompanying Jesus grew, the time came for him to focus on the development of a few to undertake much greater responsibility. This led to the next process — the selection of a core team of twelve. Once selected, the Twelve went through an intense period of training under the guidance of Jesus. Though Jesus still ministered to the crowds, his central focus shifted to the preparation of the Twelve for what lay ahead. When Jesus had previously challenged Peter, Andrew, James, and John saying, “Follow Me, and I will make you fishers of men” (Matthew 4:19), it was clear that he intended to train them to do something unique. Jesus not only intended that these men ‘follow’ him; he intended to deploy them in ministry. Indeed, shortly after his resurrection, Jesus commissioned these men to take the good news to the world, making disciples in the process (Matthew 28:18-20).

Jesus’ strategy took the disciples through three major phases (Malphurs 2004:63-73). In the first phase, disciples started as seekers, growing over time to become

true believers in Jesus. As Jesus strengthened his call for commitment, these men entered a second phase, moving from being believers in Jesus to committed followers. Once Jesus selected the Twelve who were to be trained as apostles, the third phase began. The objective of this phase was to develop the disciples from being followers into leaders.

Ogden (2003:79-98) also identified a number of stages in the development of Jesus' disciples. Due to the variable responses of the disciples, these phases are not necessarily sequential, but overlapping and iterative (Ogden 2003:79). Before entering into the developmental process, the disciples went through a pre-disciple stage in which they were investigating Jesus and very much in control of the inquiry process. However, at some stage they reached a crossover point from 'come and see' to 'follow me', requiring them to submit to Jesus as their teacher.

Drawing from the work of Hersey and Blanchard (2000:2) on situational leadership, Ogden (2003:80-81) suggested that Jesus had a 'readiness' goal in mind for his disciples. They were being prepared to "assume full responsibility for being and making self-initiating, reproducing, fully devoted followers". They were to take over his earthly ministry after his departure; and, as a master trainer, he adjusted his leadership and training approach accordingly. In the first stage, Jesus primarily served as a living example.¹⁹ The disciples associated with him, watched him, and began to absorb his ethos, mission, and message. Within a short time, Jesus became a provocative teacher, challenging their assumptions and correcting their perspectives concerning the kingdom and nature of God.²⁰ As the disciples grew in understanding, Jesus assumed the role of a coach supporting the development of important skills.²¹ This is evident in the short-term

¹⁹ Social learning theory (section 3.3.3) and social constructivism (section 3.3.6.4) highlight the influence of modeling and dialogue on the values and behavior of others.

²⁰ Jesus facilitated transformative learning, "a process by which previously assimilated assumptions, beliefs, values, and perspectives are questioned and thereby become more open, permeable, and better justified" (Cranton 2006:vi). See section 3.3.8.

²¹ Known today as *cognitive apprenticeship*, this process involves is a learning-through-guided-experience apprenticeship approach that employs cognitive and metacognitive skills, authentic contextual activity, and social interaction to guide learning and enculturate learners into authentic

ministry projects assigned to the disciples. For each project, clear parameters were given beforehand, and Jesus met with the disciples to debrief them afterwards. The final stage occurred after the resurrection, when Jesus handed over responsibility to the disciples (now apostles). Once empowered by the Holy Spirit, they demonstrated their readiness by carrying on with the mission of Jesus. Ogden (2003:91) observed, “There is a great training principle here. If we are to follow the model of Jesus, apprenticeship should be a part of all that we do so that the ministry of Jesus can be multiplied.”

Table 4.1: Jesus’ Preparatory Empowerment Process

(adapted from Ogden 2003:82)

	PRE-DISCIPLE	STAGE 1	STAGE 2	STAGE 3	STAGE 4
The role of Jesus	The inviter	The living example	The provocative teacher	The supportive coach	The ultimate delegator
The role of the disciples	Seekers	Observers and imitators	Students and questioners	Short-term missionaries	Apostles
Readiness level	Hungry to know whether Jesus was the Messiah	Ready to observe Jesus and the nature of his ministry and mission	Ready to interact with Jesus and publicly identify with him	Ready to test the authority of Jesus working through them	Ready to assume full responsibility for making reproducing disciples
Key questions	Could Jesus be the Messiah?	Who is this Jesus? What is his ministry and mission?	What is the cost of following Jesus?	Will the power of Jesus work through us when we take on his ministry?	Will I give my life entirely to the mission of making disciples who reproduce?

Noting the importance of observing “how Jesus taught, whom he taught, and what he taught”, Burton (2000:2-3) echoed the observations of others by

practices (Dennen and Burner 2008:426; Collins, Brown, Newman 1989:456).

highlighting six aspects of Jesus' teaching and training approach that can inform theological education and training in the local church today. First and foremost, Jesus taught by example. His disciples were able to directly observe Jesus and learn from him. Second, most of Jesus' teaching took place in real life situations, creating a sense of immediate relevance.²² Moreover, Jesus used sound educational principles in his approach to development, meeting the disciples at their level of understanding and taking them from the known to the unknown.²³ Jesus' teaching also had a personal touch. He sought to address the needs of individuals in a unique and personal way. Fifth, Jesus utilized evaluation as a growth tool. Debriefing and assessment played an important role in the disciples' learning process.²⁴ Finally, as Burton (2000:3) stressed, Jesus believed in his disciples, demonstrating trust by increasingly delegating important responsibilities to them.

4.3.3 The Learning Environment of the Disciples

The learning environment in which Jesus' apostles-in-training found themselves was characterized by several unique but important factors. An on-the-job 'learn as you go' environment, it was totally integrated with the divinely directed life, ministry, and mission of Jesus (Hull 2004:149).

The continual presence of Jesus with his disciples was a significant factor. The disciples accompanied Jesus wherever he went — listening, learning, observing, and later assisting in ministry as he increasingly entrusted them with responsibility. Not only were the disciples able to observe Jesus in all sorts of situations, they were also able to access and question him with relative ease. As

²² Relevance and immediacy are important adult learning principles. Both enhance the likelihood of long-term transfer to context.

²³ Anchoring new knowledge to prior knowledge is fundamental for effective learning. New information must be matched to existing memory structures. Only information brought into memory in a meaningful way will be stored as memory (Lutz and Huitt 2003:4). See section 3.3.2.5 for perspectives on memory and information processing.

²⁴ Assessment and constructive feedback are crucial to the development process. Gagné included both in the nine events of instruction (see section 2.3.1.2).

they experienced intimate relationship with Jesus, they were exposed to his personal life and example.

Significantly, learning occurred in the authentic context of a God-given mission. Together with Jesus, the disciples engaged directly with the real life challenges and issues common to the culture of that time.

In addition, Jesus' approach to leadership development emphasized learning in community (Donaldson 1996:45-46). Most of the disciples' training took place in a group learning environment as part of a handpicked team. Jesus intentionally sought to build community among his disciples and encouraged them to pursue relationship with each other. Jesus commanded them to love one another in the same way he loved them (John 13:34, 15:12). As Macchia (1999:80) noted, the lives of Jesus' disciples began to undergo transformation in the context of this community. The very nature of team dynamics no doubt greatly enhanced the learning opportunities. As Macchia observed, Jesus was preparing the disciples for his earthly departure, after which they would take up responsibility for a new 'community', the fledgling Church of Jesus Christ.

In spite of his reputation as a 'rugged individualist', the apostle Paul also valued a team-based approach to ministry and learning. Ascough and Cotton (2006:87-93) observed that, in the seven letters that scholars view as definitely Pauline, six were 'sent' from Paul and co-workers. In addition, these letters include at least a dozen references to other team members. Moreover, in the book of Acts, Luke regularly cites the names of Paul's travelling and ministry companions. While many of these could simply be viewed as 'team members', one cannot discount the excellent learning community such close relationships would facilitate.

4.3.4 The Practice of 'With-ness'

Perhaps the most telling facet of Jesus' approach to leadership development is found in Mark 3:14, where Jesus specifically appointed the twelve disciples (whom he also named apostles or 'sent ones') "so that they might be *with* him". After selecting these men, Jesus made it both a priority and practice to be with them, and for them to be with him. As mentioned previously, the

practice of 'with-ness' was a fundamental feature of his approach to leadership development.

Involving far more than 'hanging around' together, Jesus' commitment to with-ness reflected both the promise and priority of God. As the prophesied Immanuel (Isaiah 7:14, Matthew 1:23), as the Logos who became flesh (John 1:14), Jesus Christ came and lived among humankind. However, 'God with us' took on even greater significance for his closest disciples as they experienced intimate personal relationship with the Lord Jesus Christ. Not only was this sense of with-ness a fulfillment of God's prophetic promise to humankind, it was also an extension of Jesus' own sense of with-ness in his relationship with the Father (John 8:29, John 16:32).

Jesus attached great significance to close association with his core disciples. It was this closeness, this 'with-ness', this 'consociation' as Krallmann (2002:13) called it, that "generated a dynamic process of life-transference", fostering "wholistic maturity" and facilitating their growth and development as effective leaders.

However, as Krallmann (2002:54) pointed out, there was far more to this strategy of with-ness than pedagogy. Jesus did not start an academy or a school; he started a fellowship (Krallmann 2002:34-35). He built strong relationships with his core disciples, calling them friends (John 15:14-15; 20:17), brothers (Matthew 12:49, 28:10, John 20:17), and even children (Mark 10:24, John 13:33). In fact, the scripture indicates that he deeply and faithfully loved them right to the end (John 13:1). 'With-ness' was not just about leadership development, it was also about the development of authentic and loving relationships.

As Coleman (1964:40-43) noted, the total amount of time Jesus spent with his core disciples exceeded that devoted to public ministry. Not only did the disciples listen to Jesus teach and accompany him as he did ministry, they walked, sailed, ate, and stayed with him, receiving private instruction, engaging in lengthy discussions, even watching him as he communed with the

Father. Indeed, whenever Jesus engaged in public or private ministry, disciples were almost always present. In order to accelerate their preparation and to create more opportunities for undistracted time together, Jesus even made several ministry trips outside of Judea with his disciples. Moreover, as the date of his crucifixion drew near, he increasingly devoted himself to his disciples. Without a doubt, Jesus' close association with his disciples was foundational to his developmental strategy.

The manner in which Jesus chose to develop his core disciples has major implications for leadership development today. Few and far between are contemporary leadership training models that place such a great emphasis on the importance of long-term, intimate association between mentor and mentoree, teacher and learner, trainer and trainee, pastor and team. As Coleman (1964:146) observed, Jesus recognized that truth is more effectively 'caught' through shared life experience than taught in abstract concepts. The "natural informality" of this relational, association-based approach contrasted sharply with the formal, more scholastic procedures used by the scribes of Jesus' day and, need it be said, the formal educational processes used today (Coleman 1964:38).

4.3.5 Modeling

A very natural byproduct of 'with-ness', modeling was fundamental to Jesus' strategy of leader development. Out of the five exemplary leadership practices²⁵ identified through the research of Kouzes and Posner (2007:14), 'model the way' is first and foremost. By clarifying values, setting the example, and demonstrating appropriate responses to various situations, effective leaders model what their followers are to become. According to Clinton (2007), modeling is "the use of various life situations to impress upon followers godly behavioral responses, values, convictions, paradigms, and leadership lessons in order to impact their

²⁵ Information on the five exemplary leadership practices of Kouzes and Posner can be found at <http://www.leadershipchallenge.com/about-section-our-approach.aspx>.

lives with these same items”. A powerful way of exercising influence, modeling has the potential to impact the values, attitudes, beliefs, behaviors, desires, and expectations of followers. Social learning theory²⁶ founder Albert Bandura (1977:22) asserted,

Most human behavior is learned observationally through modeling; from observing others one forms an idea of how new behaviors are performed, and on later occasions this coded information serves as a guide for action.

That both the Lord Jesus and the apostle Paul understood the importance of modeling is evident in scripture. Jesus called people to ‘follow’ him; he led and taught by example. Since disciples sought to become like their teacher, this made modeling all the more effective. A dramatic example of Jesus’ use of intentional modeling occurred on the evening of their last Passover together. Jesus laid aside his garments, clothed himself with a towel, and washed the disciples’ feet. After this object lesson on humility and serving, Jesus said, “If I then, the Lord and the Teacher, washed your feet, you also ought to wash one another’s feet. For I gave you an example that you also should do as I did to you” (John 13:14-16). ‘Example’ is from the Greek noun ὑπόδειγμα, which means an example, model, or pattern that should spur one to imitation (Arndt and Gingrich 1957:851).

Admonitions to learn from the example and role model of Jesus are found throughout scripture. Jesus indicated that his followers were to do what He did (John 14:12) and serve as he served (Matthew 20:26-28). The apostle John stated that we should walk as He walked (1 John 2:6) and love others as he loved us (1 John 4:10-11). Paul instructed that we should take on the same mindset as Jesus (Philippians 2:5).

The apostle Paul also understood the value of modeling. Elliston (1992:139) noted that Paul exhorted three churches as well as his protégé Timothy to follow his example. Challenging the Corinthians as a spiritual father, he wrote, “Therefore I exhort you, be imitators of me” (1 Corinthians 4:16) and “Be imitators

²⁶ Social learning theory, also known as social cognitive theory, is discussed in section 3.3.3.

of me, just as I also am of Christ” (1 Corinthians 11:1). The word for imitator, μιμητής, is always used in a positive sense in the New Testament (Vine 1966:248). After citing Jesus, Timothy, Epaphroditus, and himself as examples, Paul exhorted the Philippian saints, “The things you have learned and received and heard and seen in me, practice these things, and the God of peace will be with you” (Philippians 4:9). To the Thessalonians, Paul stated that he and his companions worked hard to avoid being a burden to others “in order to offer ourselves as a model for you, so that you would follow our example” (2 Thessalonians 3:8-10). The word ‘model’ is τύπος, which means a mark or impression made by repeated blows. The word was often used of a prototype, pattern, or model after which something is to be made, or figuratively of an example or pattern to be imitated or followed (Zodhiates 1993). Admonishing Timothy, Paul wrote, “Let no one look down on your youthfulness, but rather in speech, conduct, love, faith and purity, show yourself an example (τύπος) of those who believe” (1 Timothy 4:12).

Modeling is a critical component of the incarnational witness of God’s people. As Richards and Hoeldtke (1980:115-116) observed, Paul described followers of Christ as “a letter from Christ” written “with the Spirit of the living God ..., known and read by everybody” (2 Corinthians 3:2-3). Christian leaders, in particular, were expected to set a good example. The writer to the Hebrews stated, “Remember those who led you, who spoke the word of God to you; and considering the result of their conduct, imitate their faith” (Hebrews 13:7).

Richards and Hoeldtke (1980:120-121) noted that the New Testament’s portrayal of the servant leader as one who *does* rather than one who simply *tells* has a unique integrity. Followers not only hear God’s word, but, more importantly, they see it lived. Leaders who live an open life among God’s people become a means by which Jesus expresses himself in human form, bringing encouragement and hope to those who seek to be transformed in a similar way. This is a fundamental aspect of leadership and leader development among God’s people.

Richards and Hoeldtke (1980:121) listed seven factors that strengthen the impact of model leaders on followers.

- (1) Frequent, long-term contact
- (2) Warm, loving relationships
- (3) Exposure to the inner state of the model
- (4) Opportunity for observation in a variety of situations
- (5) Consistency and clarity in values and behavior
- (6) Community beliefs that correspond with model behavior
- (7) Conceptual explanation of the model's lifestyle, with instruction accompanying shared experiences

Elliston (1992:139-140) noted that modeling provides two important leadership development functions. The example of a respected leader can powerfully affect the developing leader, providing opportunities for instruction, mentoring, and guidance in content, skills, affective development, and spiritual formation. Modeling is also advantageous because the situation and context are authentic; and developing leaders learn best from leaders in real life situations.

4.3.6 Discipleship, Apprenticeship, and Mentoring as Platforms for Leadership Development

Not only did Jesus offer himself as a model to his chosen disciples, he engaged them in an intentional process of development. Various terms have been applied to the leadership development strategies of Jesus, including 'discipleship', 'apprenticeship', and 'mentoring'. While there is a considerable amount of overlap among these three approaches, there are also distinctions. As such, each will be specifically examined.

4.3.6.1 Discipleship in the Developmental Strategy of Jesus

Several Greek words are used to describe the relationship Jesus had with his disciples. In the gospels, the verb ἀκολουθέω is used seventy times in reference to people following or being called to follow Jesus. According to Zodhiates (1993), this word meant to attend, to accompany, and to go with or to follow a

teacher. Though occasionally applied to the crowds, ἀκολουθέω found its main application in reference to true disciples who responded to the call of Jesus (Bledinger 1975:480-483). The verb has its greatest significance when used as an imperative by Jesus to call individuals to follow him. In these cases, it is always a call for a decisive response to enter in to a more intimate discipleship relationship with Jesus (Bledinger 1975:482).

People who made the decision to follow Jesus on a consistent basis were called ‘disciples’. At its most basic, the word ‘disciple’ means a learner, pupil, or scholar — one who comes to be taught (Pentecost 1971:14). As Pentecost noted, the idea of teaching and learning is inherent in the very concept of discipleship.

In its original secular usage in classical Greek, the word ‘disciple’ (μαθητής) spoke of one who bound himself to a teacher (διδάσκαλος) in order to gain theoretical knowledge or skill. The related verb μαθάνω denoted the process by which this occurred (Müller 1975:483). The term later found application in the Jewish religious system, where it was occasionally used of an adherent (*talmid*) to a rabbi overseeing a school aligned with one of the rabbinical traditions. In the gospels, the term μαθητής took on new significance. The word was used to describe adherents to John the Baptist, the Pharisees, and Moses; but it was in reference to Jesus that the concept of discipleship underwent a radical redefinition.

Müller (1975:488) argued that, even though the very nature of who Jesus was makes comprehensive replication of his discipling approach nigh impossible, certain helpful characteristics can be readily identified and applied even in a contemporary context. The gospels record that, unlike Jewish rabbis who waited for potential *talmidim* to apply, Jesus actively sought out and called people to follow him and become his disciples. Many of these people would have never qualified to participate in a traditional rabbinical school. Moreover, unlike participants in the rabbinical system, the disciples of Jesus could never inherit the role of master teacher, since Jesus himself will always remain the ‘Master’. Becoming a committed disciple of Jesus required unconditional sacrifice, total commitment, and the willingness to go wherever he went. Being a disciple of Jesus also entailed a commitment to proclaiming his message and serving others

in his name. Just like Jesus, acts of this nature placed his followers in danger of being misunderstood, persecuted, and even put to death.

As Müller (1975:489) noted, perhaps the one telling factor among the disciples was an absolute belief in Jesus himself, a belief that carried on undaunted after his departure from this world. The disciples in Acts, empowered and emboldened by the Holy Spirit, carried on with a high level of commitment to Jesus. They followed his example, proclaimed his message, and served others in the same type of ministry. As disciples of the risen Christ, they were renowned for their love for one another and their bold witness for Christ.

Blevins and Maddix (2010:19) offered the following perspective on discipleship.

To be a disciple is to be a follower of Jesus Christ. A disciple is a learner, a servant (*doulos*). Christians are called to lives of discipleship that emulate the life of Christ. Discipleship, regardless of the faith tradition, includes giving up your life to save it (Mark 8:34-38). The great commission given by Jesus to his followers was “to go and make disciples” (Mathew 28:19-20). We are called to be Christ’s ambassadors (see 2 Corinthians 5:20), to proclaim the good news to all nations.

Looking at discipleship from a different perspective, Ogden (2003:129) described discipleship as “an intentional relationship in which we walk alongside other disciples in order to encourage, equip, and challenge one another in love to grow toward maturity in Christ”, equipping them as well to teach others.

Adopting a narrower perspective, Clinton (1991:3-5) viewed discipleship as

a process in which a more experienced follower of Christ relates to a younger believer and shares knowledge, skills, and basic philosophy on what it means to be a growing follower of Christ in such a way as to affect character and behavior and impart an approach to living as a follower of Christ.

Hirsch (2006:24) spoke of disciple-making as the “irreplaceable and lifelong task of becoming like Jesus by embodying his message”. It is his perception that this

is the greatest area of failure and challenge for today's church. Indeed, Hirsch (2006:102) maintained,

When we are dealing with discipleship, and the related capacity to generate authentic followers of Jesus, we are dealing with the single most crucial factor that will in the end determine the quality of the whole — if we fail at this point, we must fail in all the others.... This is the very task into which Jesus focused his efforts and invested most of his time and energy.... The founding of the whole Christian movement ... was initiated through the simple acts of Jesus investing his life and embedding his teachings in his followers and developing them into authentic disciples.

It is significant to note that Jesus undertook to complete the training of the Twelve within a three-year timeline. His apparent strategy was to expand the leadership base so that, instead of there being just one 'leader', there would be many (Ogden 2003:71). This potential for exponential impact would be essential for the release of the 'greater works' that Jesus promised his disciples would experience (John 14:12). Once trained, this leadership team, operating in the guidance and power of the Holy Spirit, 'jump-started' the early church.

As Hirsch and Altclass (2009) noted, leadership and leadership development should be shaped in accordance with the example of Jesus. Unlike many modern church programs, Jesus drew no distinction between discipleship and the development of leaders. By its very nature, healthy discipleship develops leaders, and leadership development is but an extension of discipleship. The aim of discipleship is Christ-likeness — becoming like Jesus in thought, attitude, purpose, and practice. "If we fail in making disciples, we will undoubtedly fail in shaping leaders" (Hirsch and Altclass 2009).

The Lord Jesus sought to develop self-initiating, reproducing disciples. Accomplishing this purpose required him to invest heavily in a small group of people. As Ogden (2003:65) noted, this focused approach to discipleship was a foundational part of Jesus' strategy. So important was this investment that Jesus made his selection of the Twelve a public event.

Of the many possible reasons Jesus adopted this particular approach, Ogden (2003:63-73) highlighted two as being central — internalization and multiplication. For the message and ministry of Jesus to carry on after his departure, Jesus had to develop a core group of disciples who knew him intimately, understood his mission and message accurately, and could apply his method effectively. To achieve this level of internalization, Jesus practiced what Chole (2001) called ‘purposeful proximity’. It was his close, long-term association with the disciples that created a platform for them to move beyond the initial stage of what Kelman (1958:53) termed ‘compliance’ to ‘identification’ and eventual ‘internalization’²⁷. Once internalization occurs, a person willingly alters attitudes and behavior; and the resulting congruence of values creates a sense of intrinsic reward (Richards 1975:83). As Ogden (2003:67) commented, today’s reliance on preaching and programs instead of relational empowerment will never bring the level of internalization and maturity needed for effective reproduction.

In addition to internalization, there was another reason Jesus poured so much time and effort into the Twelve. Through this life-on-life strategic process, Jesus transferred his life to his disciples and they, in turn, initiated a reproductive cycle that extended his life to multitudes over many generations (Ogden 2003:70).

Jesus relied primarily upon two means or messengers to carry forward his mission and message after his death and resurrection — the Holy Spirit and the Twelve (Ogden 2003:68). Through discipleship, not only did these men come to know Jesus intimately, but they also learned his teaching, his methods, and his

²⁷ Kelman (1958:53) proposed that attitude shifts as a result of social influence manifest in three types of psychological processes: compliance, identification, and internalization. Compliance often results when the person of influence has a measure of control over the person being influenced and the person being influenced alters attitudes and behavior in anticipation of favor and reward. Identification is said to occur when an individual accepts influence because he/she wants to “establish or maintain a satisfying self-defining relationship to another person or a group”. Going further than identification, internalization results when an individual accepts the influence of another person because the ideas, values, and behavior are congruent with his/her own value system and, thus, intrinsically rewarding.

mission. After the ascension, through the Holy Spirit, they were empowered to carry forward the task.

4.3.6.2 Apprenticeship in the Developmental Strategies of Jesus and Paul

Though the educational backgrounds of Jesus and Paul were somewhat different, and though Paul was never directly discipled by Jesus, both Jesus and Paul employed apprenticeship in their developmental strategy. In this model, training happened 'on the job'; and learning was immediately put into practice in a real-life context (Burton 2000:4). For Jesus and Paul, there was nothing especially profound about this very natural method of training. During New Testament times, apprenticeship was an intrinsic part of the educational structure of society (Csinos 2010:51). Both Jesus and Paul would have been apprentices at one time in their lives — Jesus as a trainee carpenter under Joseph and Paul under whoever taught him to make tents. In addition, disciples such as James and John and most of the others would have been apprenticed by their fathers or family members. The people of the day were so accustomed to the concept that Jesus even used apprenticeship imagery when speaking of his works (Ensor 1996:213-216).

But He answered them, "My Father is working until now, and I Myself am working." For this reason therefore the Jews were seeking all the more to kill Him, because He not only was breaking the Sabbath, but also was calling God His own Father, making Himself equal with God. Therefore Jesus answered and was saying to them, "Truly, truly, I say to you, the Son can do nothing of Himself, unless it is something He sees the Father doing; for whatever the Father does, these things the Son also does in like manner. For the Father loves the Son, and shows Him all things that He Himself is doing..." (John 5:17-20).

Manson (1935:239-240) noted that, quite different from perceptions today, discipleship under Jesus was not a theoretical discipline, but a practical task to which followers were called, one that demanded full attention and considerable energy. "Their work was not study but practice." Not only was Jesus a master

teacher, he was also a master-craftsman; and they were to imitate him and learn to do as he did. Since Jesus himself was apprenticed as a village carpenter, and since he practiced what can only be considered apprenticeship with the Twelve, Manson felt fully justified in calling the disciples ‘apprentices’ rather than ‘students’. Supporting this perspective, Willard (2002) freely and consistently applied the term ‘apprentice’ in his writings.

Interestingly, Csinos (2010:45-62) noticed in the apprenticeship model of Jesus a striking parallel to the theory of situated learning proposed by Lave and Wenger (1991:15).²⁸ Situated learning proposes that learning best takes place in a “participation framework” as part of a community of practice. Moving beyond the mere acquisition of decontextualized knowledge, situated learning occurs as a person joins a community and increasingly participates in the beliefs and practices of that community (Csinos 2010:46). Since this involves the whole person (including body, mind, emotion, and social relations) and learning occurs through socialization, visualization, and imitation in an authentic (real life) context (Lave and Wenger 1991), Wenger (1998:56) is convinced that this is a far more effective approach to learning. As new participants gain legitimacy and grow in understanding and expertise through participation in the community, they move from the periphery toward the center, becoming a source of inspiration, instruction, and encouragement to others still on the periphery.

Jesus’ approach also parallels many aspects of cognitive apprenticeship,²⁹ a unique form of situated learning that involves a learning-through-guided-experience apprenticeship process. An intentional process, cognitive apprenticeship employs cognitive and metacognitive skills, authentic activity, and social interaction to guide learning and enculturate learners into authentic practices (Dennen and Burner 2008:426; Collins, Brown, Newman 1989:456). Learning takes place as novices and experts interact socially in the completion of a task (Dennen 2004:814). As Brown (1998:230) noted, “The central issue in learning is becoming a practitioner, not learning about practice”.

²⁸ Situated learning is discussed in sections 2.3.7 and 3.3.6.4.

²⁹ See section 3.3.6.4.

In the developmental model of Jesus, training was truly 'on the job'. Learning and practice went hand in hand. Jesus intended for this apprenticeship model to be perpetuated by subsequent generations of followers. Ogden (2003:91) stated candidly that if we are to follow Jesus in leadership development, "apprenticeship should be a part of all that we do" since it enhances the probability of eventual multiplication. As Burton (2000:4) noted, the apprenticeship method employed by both Jesus and Paul was and still is "a very effective way of training leaders for ministry". Nonetheless, in many ministry contexts, this model of training is largely neglected.

4.3.6.3 Mentoring as a Developmental Strategy

In recent times, mentoring has enjoyed a resurgence, both in secular and spiritual fields. Though the term 'mentoring' is never used in scripture, the nature of the Jesus' relationship with his disciples shares many traits with this increasingly popular methodology. A number of Christian scholars and practitioners have recognized this trend and produced works to encourage mentoring processes in leadership development (Stanley and Clinton 1992, Hendricks and Hendricks 1995, Elmore 1995, Maxwell 1995, Malliston 1998, Anderson and Reese 1999, Krallmann 2002, Bandy 2011).

According to Bradley (2011), the word 'mentor' originates from Homer's *The Odyssey*, in which a wise man named Mentor (Athena in disguise) was charged with the responsibility of educating and protecting Telemachus, the son of Odysseus. The term 'mentor' was used in Fenelon's (1699) novel *Les Aventures de Telemaque* and found its way into the English language by the mid 1700s.

Research by Fuller Seminary leadership professor J. Robert Clinton (1994:1-1) indicated that only about one in three spiritual leaders finish well. Fortunately, Clinton identified a number of factors that increase the likelihood of an honorable finish. One of these is mentoring. It is Clinton's contention that, because it helps to empower responsive leaders and creates higher levels of accountability,

mentoring can reduce the probability of leadership failure (Stanley and Clinton 1992:12).

For Stanley and Clinton (1992:12), mentoring is “a relational experience in which one person empowers another by sharing God-given resources”. The mentor, who “knows or has experienced something, transfers that something ... to a mentoree at an appropriate time” and in such a manner that it “facilitates empowerment or development” (Stanley and Clinton 1992:40).

Relationships of this nature are found throughout scripture — Moses and Joshua, Elijah and Elisha, Barnabas and Paul, Paul and Timothy, and, of course, Jesus and the Twelve. Victa (2008:141-142) regarded Jesus as the “master mentor”, asserting that mentoring was his primary strategy for the establishment of his earthly ministry. Though he taught and did miracles among the crowds, Jesus chose twelve to be “with him” and to be sent out to preach, heal the sick, and cast out demons (Mark 3:14-15). Victa observed that, from the beginning, Jesus planned to mentor an intimate group of disciples, pour his life into them, and multiply himself through them. Essentially, they were to become his apprentices and learn to do what Jesus was doing.

As Krallman (2002:122) noted, a mentor essentially serves as a facilitator who seeks to influence a trainee through the “totality of his shared life”, furthering the development and release of a trainee’s personality and talents. According to Krallmann (2002:122),

a mentor in a biblical sense establishes a close relationship with a protégé and on that basis through fellowship, modelling, advice, encouragement, correction, practical assistance and prayer support influences his understudy to gain a deeper comprehension of divine truth, lead a godlier life and render more effective service to God.

Clinton and Clinton (1991:2-14 – 2-22), endorsed by Anderson and Reese (1999), identified five important dynamics in effective mentoring relationships: attraction, relationship, responsiveness, accountability, and empowerment. Attraction refers to the tendency of a mentoree to move toward a potential mentor due to a desire to become like or to learn from the mentor. The early disciples

experienced a strong attraction to Jesus and sought to be with him. The mentor may also experience attraction to a potential mentoree because of a need in that person's life or because of apparent learning potential. Relationship is at the core of effective mentoring. The relational dynamic of mentoring is evident in the mutual trust and respect that characterizes mentoring experiences. Such was evident in Paul's relationships with both Timothy and Titus. Out of this trust grows responsiveness. In a mentoring relationship, the mentoree is an active learner with a teachable spirit, an agent in his or her own learning and development (Anderson and Reese 1999:100). In addition, like the disciples with Jesus and Timothy and Titus with Paul, a mentoree maintains an attitude of voluntary submission and accountability to a mentor. In turn, the mentor assumes responsibility to provide helpful input, exercise oversight, and hold the mentoree accountable. Empowerment occurs as the mentoree grows and makes developmental progress in areas such as knowledge, character, skills, and values (Clinton and Clinton 1991:2-10, 11).

In addition to Jesus and Paul, Barnabas (the 'Son of Encouragement') stands out as New Testament mentor (Elliston 1992:140-142). Though he no doubt invested in a number of people, Barnabas is especially known for his sponsorship and cultivation of emerging leaders like Paul and John Mark. In Acts 9:23-28, Barnabas served as a mentor-sponsor for Paul, putting his own reputation at risk to introduce the recently converted Paul to the church leaders in Jerusalem (Clinton and Raab 1997:12). He continued to provide linking opportunities for Paul, later traveling all the way to Tarsus to enlist his help for the ministry at Antioch (Acts 11). Barnabas' enlistment of Paul brought him into mainstream Christian leadership, helped enhance his ministry and status, and positioned him for the next major developmental phase in his life (Clinton and Raab 1997:13). After Barnabas and Paul were set apart for the mission to Cyprus, and Paul emerged as the senior leader, Barnabas continued with the mission in support of Paul (Acts 13). Interestingly, it was Barnabas' belief in people that led to the break-up of this first missionary team (Acts 15:36-40). When Paul asked Barnabas to join him for a follow-up journey, the great encourager wanted to take John Mark as well, even though this young man had impulsively abandoned them on the previous trip. Paul adamantly refused, leaving with Silas for Syria and

Cilicia, while Barnabas traveled to Cyprus with John Mark. Barnabas' belief in John Mark was vindicated. He reappeared many years later working in association with both Paul (Colossians 4:10, Philemon 1:24, and 2 Timothy 4:11) and Peter (1 Peter 5:13). As Bradley (2011) noted, belief in people's capacity to grow and learn is fundamental to successful mentoring.

A mentor can have a profound effect on the development of an emerging leader (Bandura 1977, 1986, 1997; Cohen and Galbraith 1995; Ragins and Kram 2007). Healthy relationships develop trust; and this opens the way for empowerment. The mentor's belief in the mentoree tends to act as a powerful motivator. Mentors provide modeling, instruction, correction, and encouragement. They stir the imagination, stimulate vision, enhance growth, recognize and cultivate gifts and talents, and bring out latent potential. A hallmark of Clinton's teaching on mentoring, Goodwin's (1981) expectation principle states, "Emerging leaders tend to rise up to the level of genuine expectations of older leaders whom they respect."

Jansen (2004:9-13) identified seven foundational mentoring principles from the life and ministry of Jesus as recorded in Luke.

- (1) Mentoring requires an experienced and well-prepared mentor. Jesus went through extensive preparation before he was revealed to Israel. This included his upbringing under Joseph and Mary, apprenticing as a carpenter, knowledge of scripture, intimate relationship with the Father, baptism and anointing with the Holy Spirit, and, of course, the tests of character in the wilderness.
- (2) Mentoring is most effective when it is intentional. Jesus was very deliberate and focused. He had a clear goal in mind for the disciples and work consistently toward that goal.
- (3) Mentoring is immersed in relationship. At its root, Jesus' training strategy was relational. Jesus traveled, ate, and worked with the disciples. They spent long periods engaged in discussion. For Jesus, being together was fundamental to the development of his disciples. John wrote that Jesus loved his disciples (John 13:1).

- (4) Mentoring is based on values. Jesus taught and modeled Kingdom values. He confronted hypocrisy and even corrected his closest followers when they demonstrated attitudes that were contrary to the Kingdom of God. According to Jansen (2004:11), two of the most sought after characteristics in a mentor are values and credibility.
- (5) Mentoring requires accessibility. One of the great frustrations of emerging leaders in today's church is the inaccessibility of senior leaders (Jansen 2004:12). Jesus deliberately made himself accessible in order to maximize the effectiveness of his training. Moreover, Jesus saw his disciples as friends, and treated them accordingly, even though he was the Messiah.
- (6) Mentoring allows for practical involvement. An academic for eighteen years, Jansen (2004:12) saw great value in learning experiences that go beyond the intellectual. He noted that people grow far more when they are involved in a practical real life experience. Since Jesus regularly involved the disciples in 'on-the-job' learning experiences, Jansen (2004:12) suggested that mentoring without practical learning falls short of the biblical standard.
- (7) Mentoring develops into a chain reaction. In Luke's gospel, Jesus is the master mentor, investing in the lives of twelve handpicked disciples. In the book of Acts, we see these same disciples as apostles carrying on with Jesus' work, empowered by the very same Holy Spirit. The effectiveness of Jesus' mentoring evidences itself in reproducing apostles. As Jansen (2004:13) remarked,

If we follow the biblical model of mentoring there will be a cascading effect as mentorees become mentors and start the chain reaction that has the potential to impact communities and nations.

Mentoring can take many forms. In their research on both biblical and contemporary Christian mentoring, Clinton and Clinton (1991:2-23,11-11) identified nine types of mentors. Though their application of the term 'mentor' might be considered rather broad, and though one could contend with certain classifications, this list is insightful and worthy of consideration.

Table 4.2: Mentoring Types

(adapted from Stanley and Clinton 1993:42; Clinton and Clinton 1991:2-23)

Mentoring Type/Function		Nature of Empowerment
Intensive	Discipler	Enablement in the basics of knowing and following Jesus Christ
	Spiritual Guide	Guidance and accountability for spiritual growth and disciplines
	Coach	Motivation, skills, and application needed to meet a task or challenge
Occasional	Counselor	Timely advice and correction of perspectives on God, self, others, and ministry
	Teacher	Knowledge and understanding
	Sponsor	Career guidance, protection, endorsement, and assistance
Infrequent	Divine contact	Timely guidance or discernment perceived as divine intervention
Passive	Contemporary model	A living personal model for life, ministry, and/or profession who, by their example, inspires emulation
	Historical model	A person from the past whose life and legacy teaches principles and values for life, ministry, and/or profession

Convinced of the value of mentoring for leadership development, Anderson and Reese (1999:36) stated,

It is our conviction that the quiet world of spiritual mentoring in its myriad forms offers a renewed pathway to the development of exceptional Christian leaders and the spiritual formation of true imitators of Jesus' way to spiritual wholeness.

4.3.7 The Developmental Goal of Paul

Shortly after his dramatic conversion, Paul (still called Saul at that stage) began to preach Christ in Damascus. Acts 9:25 indicates that, in less than three years,

he was already making disciples (the only time in scripture this term is used in reference to Paul's ministry). Even though the terminology of disciple-making so familiar in the gospels is largely absent from Paul's letters, the practice of making disciples and developing leaders is not. As Ogden (2003:100-101) pointed out, the apostle Paul used other terminology and often applied the metaphor of parenting³⁰ in his approach to the spiritual development of others.

Though a man of vast missionary vision, Paul was committed to 'people development'. As mentioned previously, Paul's developmental goal is summed up in Colossians 1:28-29, where he stated, "We proclaim Him, admonishing every man and teaching every man with all wisdom, so that we may present every man complete in Christ". Full development and maturity in Christ was his goal for every person.

4.3.8 The Example of Paul and Timothy

Even though Paul was a strong leader, he was also a team player. Throughout the book of Acts and in his letters to the churches, we see him continually in the company of others. With the exception of the initial part of his first missionary journey with Barnabas, Paul is always portrayed as the team leader. While certain team members might be regarded as mere traveling companions and/or co-workers, many were younger or less experienced leaders operating under Paul's guidance and supervision.

Paul's impact on emerging leaders is best illustrated in his special relationship with Timothy. Paul took an interest in Timothy on his second visit to the church in Lystra (Acts 16:1). Though Timothy's father was Greek, his mother Lois was Jewish. Lois and her mother, Eunice, had taught Timothy the Old Testament scriptures and he either came to know the Lord through their influence (2 Timothy

³⁰ The apostle Paul often used a parent-child metaphor in his discussions on spiritual growth. He referred to the Corinthians as infants (1 Corinthians 3:1) and appealed to them as children (2 Corinthians 6:13). In 1 Corinthians 14:20, he challenged them to be mature in their thinking. In 1 Corinthians 4:15, he called himself their father. Paul sent Timothy as his 'son' to help the Corinthians church (1 Corinthians 4:17) and calls him "my beloved son" (2 Timothy 1:2).

1:5) or during Paul's first visit to Lystra (1 Timothy 1:2). While still a young man, Timothy developed an excellent reputation in the church. In much the same way as the elders at Antioch had laid hands upon Paul and Barnabas (Acts 13:2), church leaders (probably including Paul and Silas) had laid hands upon him and prophesied over his life (1 Timothy 1:18, 4:14; 2 Timothy 1:6). Recognizing God's call upon Timothy, the apostle asked him to join his team. To avoid unnecessary conflict with the Jews, Paul first had him circumcised. Timothy then accompanied Paul and Silas as they went from city to city.

Timothy grew rapidly under Paul's supervision and became a gifted leader in his own right. Within two years, Paul asked Timothy to assist Silas in establishing the church at Berea (Acts 17:14). As the years progressed, Paul regularly sent him as his personal representative to check on the churches they had planted or influenced. Paul sent Timothy to Thessalonica (1 Thessalonians 3:2), Corinth (Acts 19; 1 Corinthians 4:17; 16:10-11), Macedonia (Acts 19:22), and Philippi (Philippians 2:19). After Paul's first imprisonment in Rome, he asked Timothy to remain in Ephesus to guard against false teachers (1 Timothy 1:3). Timothy eventually left Ephesus to spend time with Paul during his second imprisonment in Rome (1 Timothy 4:9, 21). The writer to the Hebrews (13:23) mentioned that Timothy was imprisoned and released at some stage, possibly around the time of Paul's execution. Timothy seems to have remained active in ministry and may have spent the rest of his life assisting with oversight of the Asian church, perhaps operating out of Ephesus.

Timothy is mentioned in several letters attributed to Paul (Romans 16:21, 1 Corinthians 4:17, Philippians 2:19) and seems to have been a co-author or co-sender of others (2 Corinthians 1:1, Philippians 1:1, Colossians 1:1, 1 Thessalonians 1:1, 2 Thessalonians 1:1, Philemon). Timothy was also the recipient of two personal letters from Paul, both of which are full of affection, encouragement, affirmation, and practical instruction. These letters provide guidance for church leaders to this day.

Calling him his 'child in the faith' (1 Timothy 1:2, 2 Timothy 1:2), Paul loved, prayed for, and encouraged Timothy. That Paul regarded Timothy with the greatest respect cannot be doubted. To the Philippians he wrote,

But I hope in the Lord Jesus to send Timothy to you shortly, so that I also may be encouraged when I learn of your condition. For I have no one else of kindred spirit who will genuinely be concerned for your welfare. For they all seek after their own interests, not those of Christ Jesus. But you know of his proven worth, that he served with me in the furtherance of the gospel like a child serving his father (Philippians 2:19-22).

As Malphurs and Mancini (2004:23) noted, Paul exhorted Timothy to continue to grow and develop as a leader.

Let no one look down on your youthfulness, but rather in speech, conduct, love, faith and purity, show yourself an example of those who believe. Until I come, give attention to the public reading of Scripture, to exhortation and teaching. Do not neglect the spiritual gift within you, which was bestowed on you through prophetic utterance with the laying on of hands by the presbytery. Take pains with these things; be absorbed in them, so that your progress will be evident to all. Pay close attention to yourself and to your teaching; persevere in these things, for as you do this you will ensure salvation both for yourself and for those who hear you (1 Timothy 4:12-16).

When Timothy faced possible intimidation at Corinth because of his age, Paul intervened on his behalf, admonishing the church to make sure he had no reason to fear (1 Corinthians 16:10).

Today's church leaders can learn much from the example of Paul. The apostle served as a recruiter, spiritual father, teacher, trainer, mentor, sponsor, and coach to Timothy. However, as a careful reading of the New Testament highlights, Paul not only aided in the development of Timothy, he also invested in the development of many others.³¹

³¹ Others undoubtedly influenced by Paul include Silas, Titus, Priscilla and Aquila, Luke, Onesimus, Lydia, Epaphras, Gaius, Sopater, Aristarchus, Epaphroditus, Trophimus, Tychicus,

4.3.9 The Teaching Ministry of Jesus

Teaching played a fundamental role in the leadership formation strategy of Jesus. In the gospels, the term 'teacher' is applied to Jesus forty-five times; and fourteen times he is referred to by the Aramaic term 'rabbi' (Stein 1994:1). Though Jesus lacked formal rabbinical teaching, he clearly fulfilled the role of 'rabbi' and teacher during the three years of his earthly ministry. Most imagery portrays Jesus teaching in a public context; but the gospels indicate that he devoted a significant amount of time to teaching his disciples privately.

4.3.9.1 What Made Jesus an Effective Teacher

Stein (1994:8) identified three key factors that contributed to Jesus' effectiveness as a teacher: who he was, what he taught, and how he taught it. As the Son of God directed and empowered by the Holy Spirit, Jesus spoke what his Father gave him to speak. In John 7:15-16, when the Jewish leaders heard Jesus teaching at the feast, they asked themselves, "How has this man become learned, having never been educated?" Jesus responded, "My teaching is not Mine, but His who sent Me". In John 8:28, Jesus said, "I do nothing on My own initiative, but I speak these things as the Father taught Me". Shortly after this, Jesus again stated the source of his teaching.

For I did not speak on My own initiative, but the Father Himself who sent Me has given Me a commandment as to what to say and what to speak. I know that His commandment is eternal life; therefore the things I speak, I speak just as the Father has told Me (John 12:49-50).

As Reed and Prevost (1993:64) remarked, unlike the rabbis who essentially repeated to their disciples what they themselves had been taught, Jesus taught with primary authority. When Jesus finished the Sermon on the Mount, his listeners were amazed, for he taught "as one having authority, and not as their scribes" (Matthew 7:28-29). Even the temple guards sent to arrest Jesus were

awestruck by the way he communicated (John 7:46). Jesus' reliance on the Father to guide and empower his teaching certainly bore fruit. His example requires us to give careful consideration to our own approach to teaching in the leadership development process.

There were other significant differences between Jesus and the rabbis of his time. Unlike the rabbis who taught pupils to follow a specific tradition, Jesus asked people to follow *him* (Stein 1994:2). Though Jesus was certainly a skilled teacher and an excellent model, he did more than model his teaching. Jesus *was* what he taught. He *was* the message; and this made both him and his message credible (Yount 2008:51). Teaching flowed naturally from the life of Jesus, creating authenticity as his words and actions reinforced one another.

In addition, Jesus did not focus primarily on the transmission of intellectual knowledge, but rather on transformational learning.³² Both the content and methods of his teaching confronted and corrected faulty values and root beliefs, specifically regarding the kingdom of God, the fatherhood of God, Christology, and ethics (Stein 1994:60-151). Jesus knew and understood scripture, yet 'teaching the Bible' was not his goal. He employed his mastery of scripture and teaching to teach *people*. "People were his focus. Scripture was his means" (Yount 2008:61). Jesus personalized teaching, addressing the real life needs and aspirations of his listeners (Yount 2008:57). He both understood humankind and diligently paid attention to the Holy Spirit's leading as he taught and ministered. Character was more often his focus than content (Yount 2008:65).

Jesus' attitude toward learners was noteworthy. Compassion and care characterized his interaction with people (Yount 2008:53). His style clearly reflected a mature affective perspective and a great degree of cultural intelligence. He was skilled at engaging with people from backgrounds, including males and females, adults and children, poor and wealthy, Jews and Samaritans,

³² Jesus employed an approach to learning that was 'transformative' in nature. Cranton (2006:vi) described transformative learning as "a process by which previously assimilated assumptions, beliefs, values, and perspectives are questioned and thereby become more open, permeable, and better justified." Various understandings of transformative learning are discussed in section 3.3.8.

Jewish religious leaders and Roman military officers (Yount 2008:52-53). He loved his disciples and nurtured, prayed for, and even wept over them. He forgave them when they failed and patiently retaught them when they struggled to learn (Yount 1999:224-225). Ultimately, Jesus demonstrated his love for people by voluntarily laying down his life as an atonement for sin, perhaps the greatest 'teaching example' in human history.

4.3.9.2 How Jesus Stimulated Interest

Zuck (1995:158) identified four elements that served to stimulate interest in the teaching ministry of Jesus — motivation, variation, participation, and visualization.

Motivation

"Motivating learning simply means making learning desirable or desired. It is causing people to want to learn" (Zuck 1993:156). Zuck (1995:158-164) identified a number of ways in which Jesus motivated learning. He captured attention³³ by asking people to listen, making shocking or startling statements, doing miracles, telling stories, asking questions, using visual aids, calling people by name, and even asking for practical help. Jesus stimulated interest through dramatic stories and compelling illustrations, many of which connected directly with the needs, anxieties, and frustrations of the people (Yount 2008:63-64). He deliberately created perplexity and stirred curiosity, often waiting until these had piqued before providing answers. Jesus also helped people become aware of specific needs (deficiencies) in their lives and did not hesitate to address the questions and problems of those who approached him. On the other hand, Jesus also commended people on a regular basis, no doubt knowing that such affirmation tends to build a sense of openness and increase intrinsic motivation.

³³ Interestingly, the very first step in Gagné's nine events of instruction (section 2.3.1.2) involves gaining the learner's attention. Gagné recommended many of the very same tactics used by Jesus to capture attention.

Variety

As a master teacher, Jesus employed a variety of teaching methods, including parables, object lessons, dialogue, questions, comparison, hyperbole, puns, humor, and even poetry (Reed and Prevost 1993:65). Wlodowski (2008:151), who researched motivation in adult learning, recognized the value of variety in teaching and learning saying, “People tend to pay more attention to things that are changing than to things that are unchanging”. As Reed and Prevost (1993:67) noted, Jesus exercised great creativity in his methods, teaching important truths in various, often demanding situations to people from diverse backgrounds. More importantly, Jesus was able to strike an effective balance, explaining a more complete revelation of God’s purposes for humankind, while communicating successfully in the cultural context.

Participation

Jesus emphasized action more than knowledge (Yount 2008:69). ‘Doing’ is an important part of the learning process.³⁴ Zuck (1993:161) remarked that if learning is to take place, there must be activity, whether physical, emotional, or mental. Jesus obviously understood the value of participation and practice. His approach to training was very much ‘on-the-job’; and he increasingly involved his disciples in teaching-learning processes and important ministry experiences as his crucifixion drew near. As Zuck (2002:175) observed, the activities in which the Lord involved the disciples enabled them to live out in practice what they were learning in principle. As James (1:22) reminds us, it was clearly Jesus’ intention that his disciples be doers of the word, not just hearers.

Visualization

A master communicator, Jesus did not restrict his approach to auditory learning, but capitalized on the connection between hearing and sight in the learning

³⁴ Noted adult learning expert Jane Vella (2002:14) considers ‘praxis’, doing with reflection, one the keys to effective learning. Praxis makes new content relevant to a learner, increasing the likelihood of constructed knowing and eventual transfer into the context. See section 2.3.9.1.

process. According to instructional design expert Geri McArdle (2010:65), research indicates that approximately eighty percent of the information people take in is through sight, and only eleven percent through hearing. Thus, for most learning, sight is the primary means for absorbing information. Jesus made extensive use of visual learning aids, greatly enhancing the enjoyment, meaning, and memorability of his messages (Zuck 2002:176). Wilson (1974:115) noted that, in many ways, through his own example, Jesus himself was the ultimate visual aid.

4.3.9.3 A Contrast in Focus and Methods

As Yount (2008:66-72) observed, Jesus' approach to developmental teaching contrasts with many of today's practices. As previously noted, unlike the overwhelming majority of current discipleship and leadership development 'programs', Jesus taught by example. He was observable and accessible, and invested significant amounts of time and effort building relationships with his disciples. Jesus also placed far more emphasis on active learning in an authentic context than on passive learning in a 'school' type environment.³⁵ In addition, rather than focusing on short-term results, Jesus embraced a long-term developmental perspective. Unlike the Pharisees of his day and some theological training today, Jesus majored on the majors and did not get bogged down in unnecessary detail.³⁶

Though Jesus taught large crowds, he focused on training smaller groups. Jesus chose the Twelve to be trained as apostles (Mark 3:15, Luke 6:13); and the

³⁵ Piaget's cognitive constructivism (section 3.3.6.2) emphasized the importance of an 'active' leaning process associated with problem-solving in a real context. Most constructivist approaches to learning share this perspective.

³⁶ Jesus avoided the 'twin sins' of activity-focused teaching and coverage-focused teaching, neither of which answers what Wiggins and McTighe (2005:3) consider to be the key question at the heart of learning — "what is really important?" The 'backward design' approach developed by Wiggins and McTighe (see section 2.3.6) helps designers to identify the essential understandings a learner needs and then design instructional content and processes accordingly.

seventy³⁷ were chosen to go before him to announce his coming (Luke 10:1). However, Jesus intimately focused on Simon Peter, James, and John. These three were privileged to witness the transfiguration, see Jairus' daughter raised from the dead, and be near Jesus in Gethsemane. Jesus most certainly understood that the more intimate the relationship and focused the training, the deeper the transformational impact on the trainee.

4.3.9.4 The Teaching Methods of Jesus

Lecture

Though often frowned upon in today's constructivist circles, lecture was one of the primary instructional methods used by the Lord Jesus. The gospels record at least fifty topics on which Jesus taught (Zuck 2002:79-81). A number of factors made the lectures of Jesus appealing to listeners (Zuck 2002:166-170). He spoke on various topics in various contexts for varying lengths of time. He combined lecture with other methods and frequently used illustrations from everyday life to make his teaching more interesting and effective. Recognizing the importance of readiness and prior learning³⁸, Jesus usually started with what was known and moved to the unknown. He was also careful to address the three realms of human experience — rational, emotional, and behavioral (knowing, feeling, and doing) — making his teaching holistic in nature (Yount 1999:15). Interestingly, he allowed and made full use of interruptions. One of the most important features of Jesus' lectures was their personal relevance to listeners.

Parables

Of all the teaching techniques used by Jesus, the parable is the best known. Much of Jesus' teaching in the gospels is expressed in this form. So memorable are the parables of Jesus that they have left their mark on the English language. As Stein (1994:33) noted, expressions such as 'good Samaritan' (Luke 10:29-37),

³⁷ Some early manuscripts read "seventy-two".

³⁸ As chapters two and three indicate, assessment of readiness to learn and prior learning are fundamental to effective instructional design and adult learning.

'prodigal son' (Luke 15:11-32), 'separating the wheat from the chaff' (Matthew 13:24-30), and 'leaving things to the eleventh hour' (Matthew 20:6) all originate from Jesus' parables.

Giving "concrete expression to abstract principles", parables are stories used to illustrate a central truth (Reed and Prevost 1993:65). Usually fictitious, the parables of Jesus were drawn from life situations quite familiar to the hearers. Many of Jesus' parables were expressed as plausible and rather specific stories and examples, and some were clearly allegorical. Interestingly, the word 'parable' was also applied by the disciples to figures of speech such as metaphors and similitudes³⁹ (Stein 1994:34-35). Examples include Jesus' teaching on defilement in Mark 7:14-23 and the "kingdom of God" passages found in Mark 4:26-34. A powerful teaching tool, parables forced the hearer to reflect in order to understand the central message and often challenged assumptions and underlying values.

Object Lessons

Jesus made frequent use of object lessons, increasing the dramatic impact and memorability of his teachings (Reed and Prevost 1993:65-66). Some of his object lessons were designed to serve as ongoing reminders of the truths he taught. Examples of object lessons include the use of bread and wine to represent the body and blood of Jesus (Matthew 26:26-28), the fig tree that withered (Mark 11:13-21), the Roman coin (Mark 12:13-17), and the washing of the disciples' feet (John 13:1-17).

Dialogue and Discussion

Dialogue features regularly as a teaching/learning tool in the ministry of Jesus (Reed and Prevost 1993:66). Jesus' use of personal, meaningful, directed conversation indicated his concern for people and his desire to help them learn and grow in understanding. For Jesus, dialogue frequently involved questions

³⁹ Stein (1994:35) defined a similitude as a comparison that involves the likening of something, such as the kingdom of God, to typical normal events. Essentially, it is a simile expanded into a picture.

and statements of common interest that challenged faulty assumptions and perspectives, seeking to move the person toward a deeper understanding of truth and a change in thinking (Zuck 1995:170-173). Immediacy and relevance were central to his conversations. Transformative learning⁴⁰ was often his goal. Wisely, Jesus made frequent use of ‘who’ and ‘what’ questions, avoiding those with ‘yes-and-no’ responses. Also noteworthy is the way Jesus adapted his manner of conversation to each individual or group.

Clever Use of Language

Since listeners often delight in speakers who use language in an entertaining and engaging manner, Jesus regularly used figures of speech in his teaching. Metaphor, simile, hyperbole, and even poetry and puns featured in his repertoire. Reed and Prevost (1993:67) described Jesus’ rather witty use language in his criticism of the Pharisees in Matthew 23:24. While the hyperbole is all too evident, one has to consider what was being said in the Aramaic to catch the play on words. “You blind guides! You strain out a gnat (*galma*) and swallow a camel (*gamla*)!” In spite of the seriousness of this passage, one cannot help but believe that such clever use of language brought a chuckle from the nearby crowd and made this incident very memorable.

Experiences

As mentioned previously, people learn by doing. Meaningful activities, assignments, and projects all enhance the learning process (Zuck 1995:174).⁴¹ Jesus regularly involved the disciples in his ministry. They assisted with the feeding of the multitudes (Matthew 14:19-20, 15:36-37), were sent out to preach and heal (Luke 9:1-6), and helped with the preparation for his entry into Jerusalem and the Passover (Matthew 21:1-3 and 26:17-19). Activities such as these enabled the disciples to put into practice what they were learning, better preparing them for what lay ahead (Zuck 1995:175).

⁴⁰ Transformative learning is discussed in section 3.3.8.

⁴¹ Section 5.5.1 examines the critical role of experience in the development of leaders.

4.3.10 The Teaching Ministry of Paul

When Jesus issued the Great Commission in Matthew 28:18-20, he commanded the apostles to make disciples. This disciple-making strategy would include going, baptizing, and teaching. Specifically, the apostles were to teach disciples to observe all that Jesus commanded. As Blomberg (1992:433) noted, “Teaching obedience to all of Jesus’ commands forms the heart of disciple making.... If new converts are not faithfully and lovingly nurtured in the whole counsel of God’s revelation, then the church has disobeyed....” Though the apostles faced many responsibilities and challenges, they placed a priority on teaching God’s word (Acts 6:2). Within a short time, through the working of the Lord, other leaders began to emerge, carrying the same burden to proclaim Jesus and teach his word. Among these was a young man by the name of Saul of Tarsus, who would one day become the most prolific apostle the church has ever known.

After his dramatic conversion, Paul (Saul’s Roman name) quickly emerged as a proclaimer of Christ and a disciple-maker (Acts 9:20-31). Aided by Barnabas, he became acquainted with the leaders in Jerusalem and there proclaimed Christ with such conviction and controversy that the church sent him to Tarsus to maintain peace (Acts 9:28-31). When Barnabas was dispatched to check on what God was doing among the Hellenists in Antioch, he traveled to Tarsus to recruit Paul. In Antioch, working with Barnabas, Paul’s teaching ministry flourished (Acts 11:21-26). When the Holy Spirit led the Antioch elders to set apart Barnabas and Paul for special ministry, Paul’s apostolic ministry was born. From this point, Paul became the central human character in the book of Acts. This man, “once a blasphemer and a persecutor and a violent aggressor” (1 Timothy 1:13), became the most prolific apostle of that era and the author or co-author of as many as thirteen New Testament letters (Reed and Prevost 1993:13). He also influenced the development of many other leaders.

The apostle Paul identified himself as a preacher, an apostle, and a teacher of the Gentiles (1 Timothy 2:7, 2 Timothy 1:11). Somewhat amazed, Zuck (1998:13) noted that, of the several thousand books and articles written about Paul, only a handful focus on his teaching ministry. That Paul placed importance on the ministry of teaching cannot be denied. He specifically required those considered

for eldership to be “apt to teach” (διδακτικός) (1 Timothy 3:2,12), or as Zodhiates (1993) explained, “didactic, able to communicate Christian teaching, apt or skilled in teaching”. He also placed great belief in the transformational power of God’s word. Paul wrote Timothy saying,

All Scripture is inspired by God and profitable for teaching, for reproof, for correction, for training in righteousness; so that the man of God may be adequate, equipped for every good work (2 Timothy 3:16).

Though Paul had many characteristics and unique experiences that would make him difficult to imitate, today’s leaders can learn from his teaching ministry. Zuck (1998:20-23) highlighted several factors that teachers today share with Paul. Like Paul, everyone involved in teaching ministry today came from a sinful background and must continue to grow in Christ, pressing on to lay hold of the reason Jesus has laid hold of us (Philippians 3:12). Perhaps most exciting, the teachers of today share with Paul the same message empowered by the same Holy Spirit! In addition, the various means of communication used by Paul are still available today. Indeed, today’s teachers have access to means of communication never dreamed of in Paul’s day. Lastly, like Paul, teachers of today can understand that this type of ministry is hard work. Dependence upon the grace of God and the guidance and power of the Holy Spirit is essential.

For Ascough and Cotton (2005), Paul stands out as a passionate visionary, who, motivated by compassionate concern, served as an inspirational leader and nurturer of individuals and communities. He was the ultimate transformational leader. Like Jesus, Paul was a gifted ‘paradigm buster’, a teacher of hard-hitting truths centered in union life with Christ. His commitment to relationships, leadership development, teamwork, and networking were noteworthy. Transparent about his own life, Paul was an authentic source of encouragement and affirmation, a model worthy of imitation. Nonetheless, he would not hesitate to confront deception and wrongdoing. As Zuck (1998:63-85) noted, Paul was passionate about God. His whole life was centered in Christ. Committed to prayer, he regularly interceded for churches and individuals alike. A man of uncompromising integrity and humility who spoke truth in love, Paul also

understood the need for cultural and religious sensitivity. As Zuck (1998:81-85) observed, one of Paul's most outstanding characteristics was his genuine love, affection, and appreciation for people, all of which testify to a truly transformed life. Zuck (1998:80) noted that instructors who love their 'students' in a way that students can appreciate communicate with far greater impact.

Throughout his post-conversion life, Paul engaged in significant amounts of preaching and teaching (Zuck 1998:28-32). Whereas his preaching focused on proclaiming Jesus as the Christ, Paul's teaching focused on strengthening believers, instilling knowledge and understanding, and fostering spiritual growth. Spiritual maturity was clearly his ultimate goal in teaching. He understood that God intended to conform believers to the image of Christ (Romans 8:29) and, as such, sought to present every person complete (fully developed, mature) in Christ (Colossians 1:28).

Like Jesus, Paul was a gifted teacher. He utilized lecture, discussions, personal stories, and letters as teaching tools (Zuck 1998:148-154). He captured the attention of listeners, appealed to curiosity, addressed needs and problems, included figures of speech and interesting illustrations, used logical arguments, and challenged people to think. Paul was a master of simile, metaphor, and hypotaxis, and, on occasion, even threw in a bit of sarcasm and humor (Zuck 1998:198-220). In addition, he was mindful of his audience, including rhetorical devices to make his teaching and letters easier to remember (Zuck 1998: 221-242)

Paul taught for extended periods at Antioch, Corinth, Ephesus, and Rome. He taught in synagogues, public places, churches (most of which were in homes), and even in the lecture hall of the school of Tyrannus in Ephesus.

An analysis of Paul's teaching approach holds valuable lessons for those involved in teaching for leadership development. Zuck (1998:150) highlighted the following.

- (1) Know the learner(s) and adapt content accordingly.⁴² As a Jew who was also a Roman citizen, Paul was sensitive in this area. Paul spoke to Jews, Athenians, Romans, and royalty. He was willing and able to adapt to his audience, no doubt assisted by the enablement of the Holy Spirit.
- (2) Promote interaction. Engage in meaningful discussion around the concerns of the learners. The apostle Paul was adept at discussion and debate. The book of Acts records a number of such interactions between Paul and others.
- (3) Make teaching challenging. Paul stimulated people to think. He regularly used concepts, illustrations, and metaphors that piqued interest and provoked people to examine their assumptions. Without mental processing, people do not change.
- (4) Gently confront and correct false concepts (2 Timothy 2:25). Paul instructed Timothy that God's word is profitable for reproof and correction (2 Timothy 3:16). Paul was willing to engage in discussion and debate in order to help people come to correct understanding.
- (5) Move people toward a response. Paul regularly challenged people, urging or persuading them concerning Jesus (Acts 13:43, 17:4, 18:4, 19:8, 26:26-28). In Acts, Luke's use of πείθω — meaning to convince, to persuade, to move, or to affect (Zodhiates 1993) — indicates that Paul sought to evoke a response of some kind (Zuck 1998:150).

Paul's letters also communicated with great affect, so much so that the apostle Peter recognized his letters as scripture (2 Peter 3:16). Zuck (1998:151-152) identified thirty-six different types of instructional elements in the writings of Paul, including admonitions, arguments, analogies, commands, doctrines, exhortations, explanations, goals, illustrations, prophecies, questions, reminders, stories, testimonies, and warnings. Most of Paul's writings follow a characteristic pattern.

⁴² Vella considers a 'learning needs and analysis' to be fundamental to the design of effective teaching (see section 2.3.9.1); and most instructional design models emphasize the importance of an analysis of learners and learning needs before undertaking the design of training and instruction. See section 2.3 for an overview of instructional design models.

The first part of the letter often deals with doctrinal issues, while the second part deals with application.

4.3.11 The Importance of Teaching

Both Jesus and Paul emphasized the preaching and teaching of God's word as central to effective leadership in the early church (Bredfeldt 2006:27,38). In Matthew 28:18-20, Jesus prescribed "teaching them to observe all that I commanded you" as the ultimate process in disciple-making. Paul instructed his protégé Timothy to give attention to reading scripture to the people, as well as to exhortation and teaching (1 Timothy 4:13). As Bredfeldt (2006:38) observed, "The shepherding role carries the responsibility of feeding the flock. Leaders must provide spiritual food and protection for God's people through the clear proclamation of the word of God". So important is this role that Paul included "able to teach" (1 Timothy 3:2) in the qualifications for eldership. Echoing the need for multigenerational leadership development, Paul admonished Timothy to entrust to faithful men what Paul had entrusted to him so that they could teach others also (2 Timothy 2:2). Effective teaching is an intrinsic part of effective leadership development.

4.3.12 Skills Development

From the beginning, Jesus communicated his intention to train the disciples for ministry. "Follow Me, and I will make you become fishers of men" (Mark 1:17). As disciples and apprentices, the Twelve no doubt wanted to be like their rabbi; and that meant doing what their rabbi did. Jesus followed a standard apprenticeship approach in the development of the disciples as 'fishers of men'.⁴³ The disciples accompanied Jesus and watched him in action. They saw and heard him teach. They watched him cast out demons and heal the sick. They observed his compassion for the hurting and his anger at hypocrisy. They observed how he handled conflict and difficult situations. They watched him pray.

⁴³ Jesus' approach to skills development shares characteristics with learning processes found in social learning theory (section 3.3.3) and social constructivism (section 3.3.6.4).

As Coleman (1964:82) noted, Jesus was always building toward the day that his disciples would take over his work. As such, he gradually began to give them responsibility as he ministered. Initially, the disciples helped with practical issues of food and provisions. At the feeding of the multitude, they helped with organization of the crowd, distribution of the food, and the collection of the fragments (Matthew 14:13-21). John 4:2 records that the disciples assisted Jesus by baptizing people. As their training continued, “Jesus summoned His twelve disciples and gave them authority over unclean spirits, to cast them out, and to heal every kind of disease and every kind of sickness” (Matthew 10:1). Then he sent the Twelve out in teams of two instructing them to “go to the lost sheep of the house of Israel” (Matthew 10:6-9). They were to proclaim the coming of the kingdom, heal the sick, raise the dead, cleanse the lepers, and cast out demons. In addition, they were to trust God to provide their needs. Jesus also instructed them about strategic aspects such as ministering where they were welcome and establishing beachheads in the communities they visited (Coleman 1964:85-86). Luke 10:1-23 indicates that Jesus later sent out a larger group on a similar mission. After meeting with these disciples and hearing their success stories, Jesus rejoiced greatly in the Holy Spirit!

Not all of the disciples’ ministry efforts were successful. Jesus once had to come to the aid of his disciples when they could not cast out a demon. Wisely, he used this experience as a teaching opportunity for future encounters (Matthew 17:14-21).

As Jesus gradually involved the disciples in increasingly important ministry roles, the disciples gained valuable experience putting knowledge into practice. They developed ministry skills, learned to rely upon God, and saw him work in power as they obeyed (Krallmann 2002:69).

4.4 Three Important ‘Leadership’ Metaphors

Both Jesus and Paul made extensive use of metaphors to convey an understanding of the roles and responsibilities of biblical leadership. Zuck

(1995:192) described a metaphor as “a comparison in which one thing is said to be, act like, or represent another”. According to Caird (1980:17, 152),

In its simplest form, metaphor is the transfer of a name from its original referent to another: but this is commonly accompanied by a corresponding transference of feeling or attitude, and it is the second part of the process that makes metaphor such a potent influence in the emergence of moral ideas.... Metaphor is a lens: it is as though the speaker were saying, ‘Look through this and see what I have seen, something you would never have noticed without the lens!’

Elliston (1992:24-25) highlighted three important metaphors applied by Jesus to leadership: the servant, the shepherd, and the steward. These metaphorical perspectives on leadership provide a framework for the types of leaders the church needs to develop.

4.4.1 *The Leader as a Servant*

One of the dominant leadership metaphors in the New Testament is that of the servant. In the last twenty years, ‘servant leadership’ has become a buzzword, often discussed but too rarely practiced. The Lord Jesus exemplified servant leadership not only in what he taught, but also in how he lived and led.

In Matthew 20:20-21, at the instigation of her sons James and John (Mark 10:35), Salome, the sister of Mary the mother of Jesus (Wilkins 2004:667), approached Jesus and made a rather bold request for special positions of favor for her sons in the future kingdom. Sometime before this incident, the disciples had been engaging in discussions among themselves about who was the greatest. Needless to say, this request only heightened the already tense atmosphere among the disciples. Recognizing a ‘teachable moment’, Jesus capitalized on this rather awkward situation to speak about true greatness.

You know that the rulers of the Gentiles lord it over them, and their great men exercise authority over them. It is not this way among you, but whoever wishes to become great among you shall be your servant, and whoever wishes to be first among you shall be your

slave; just as the Son of Man did not come to be served, but to serve, and to give His life a ransom for many (Matthew 20:25b-28).

Offering himself as an example, Jesus conveyed to his disciples that greatness in God's kingdom is not found in positions of authority and power, but in serving others.

From the broader context of this story in Mark's gospel (10:32-45), Hutchinson (2009:62-64) identified three key issues Jesus sought to clarify.

- Spiritual authority and leadership come only through the path of sacrifice and suffering (10:38–39).
- Spiritual authority and leadership can be sovereignly granted only by God the Father (10:40).
- Spiritual authority and leadership are demonstrated through servanthood, selflessness, and sacrifice for others (10:41–45).

As Malphurs (2003:41) noted, shortly after this incident, the disciples once again began to argue about who was the greatest among them (Luke 22:24-30), providing Jesus with another opportunity to reinforce the concept of servant leadership. As the disciples gathered to celebrate the Passover, without warning, Jesus rose from the table, laid aside his garments, and picked up a towel to wash the disciples' feet (John 13:3-5). Since this was normally the task of the lowest slave in the household, it no doubt created consternation among the disciples. Having captured the attention of his disciples through this dramatic demonstration, Jesus spoke very directly on attitude in leadership.

So when He had washed their feet, and taken His garments and reclined at the table again, He said to them, "Do you know what I have done to you? You call Me Teacher and Lord; and you are right, for so I am. If I then, the Lord and the Teacher, washed your feet, you also ought to wash one another's feet. For I gave you an example that you also should do as I did to you. Truly, truly, I say to you, a slave is not greater than his master, nor is one who is sent greater than the one who sent him. If you know these things, you are blessed if you do them. (John 13:12-17).

Through this object lesson and the teachable moment it created, Jesus, the Teacher and Lord, demonstrated the essence of leadership in his kingdom. Strikingly, the broader context of this story gives clear insight into the motive that drives this type of leadership. “Jesus, knowing that His hour had come that He would depart out of this world to the Father, having loved His own who were in the world, He loved them to the end” (John 13:1). Jesus loved his disciples. It is love that motivates the true servant leader. Now that the Lord’s time of earthly ministry was at an end, an even greater act of servant leadership was imminent — Jesus would lay down his life, take on the sin of the world, and open the door for humankind to be reconciled to God! Reinforced by this act of even ‘greater love’, Jesus’ demonstration of servant leadership would have a transformational effect on the apostles and the life and ministry of the early church.

From these two passages, Malphurs (2003:34-41) identified four characteristics of servant leaders — a perspective of humility, a willingness to serve, a focus on benefitting others, and a motivation rooted in love. Indeed, as Richards (1975:231) remarked, “the critical concept underlying ‘ministry’ is one of service and support of others....”

Table 4.3: Servant Leadership in Matthew 20:25-28 and John 13:3-17

(adapted from Malphurs 2003:31-43)

Characteristic	Directive	Contrast
Manner of leadership	Humility	Not in arrogance or pride
Essence of leadership	Serving	Not being served
Beneficiaries of leadership	Others	Not self
Motivation of leadership	Love	Not for self-gain

Hutchinson (2009:65-66) commented on the radical demand this leadership perspective made on the disciples of Jesus.

Paradoxically, greatness in Christ’s kingdom contradicts natural human aspirations and cultural standards. James, John, and the other disciples were pursuing models of leadership, greatness, and even service that reflected the value system of their culture.

Anyone would be expected to pursue such positions in both the Jewish and Greco-Roman world because those cultures valued honor and sought above all to avoid dishonor. Jesus was asking His disciples to abandon their way of thinking and to adopt a new value system that would govern His kingdom.

The servant leader model carries serious implications for leadership in the church (Richards 1975:132-134). The servant leader is not over those he or she leads, but among them. The servant leader's task is "to serve others in that which is important to God". Being transformed through God's word and power, the servant leader gives of self to build others as disciples. Rather than seeking to build his or her career, the servant leader is concerned with building the body of Christ. Indeed, the Christian leader is called to serve the way Jesus did, by laying down his or her life for the sheep. The perspective of the servant leader is summed up well in Paul's statement to the Corinthian church: "I will most gladly spend and be expended for your souls" (2 Corinthians 12:15). It is this type of leader that churches must seek to develop.

4.4.2 The Leader as a Steward

As Ryken, Wilhoit, and Logman (1998:59-60) indicated, Jesus and the apostles often used terms such as servant (δῆκονος) and slave/bondman (δοῦλος) as they taught on leadership roles and responsibilities. In many instances, these terms were used to emphasize the authority of the Lord as master. To convey a sense of the responsibility entrusted to Christian leaders, however, Jesus, Paul, and Peter metaphorically used the concept of the household steward or manager (οἰκονόμος).

The steward metaphor is closely related to and derived from the concept of the servant leader. In biblical times, a 'steward' was the household manager of a large estate and usually in charge of slaves and servants as well as financial management (Goetzmann 1971:253-256). In spite of the responsibility and authority associated with this position, most stewards were slaves. As Keller (2006:1) noted, the steward had authority over the estate, but only within the boundaries of the will of the lord of the estate.

As both a ruler and a slave, the “steward” provided a unique and profound metaphor for leadership among God’s people. Jesus applied this metaphor in Luke 12:41-48 (paralleled in Matthew 24:45-51) after a discourse on the importance of being ready for his return. Unsure of who Jesus was addressing, Peter asked if the parable was for the disciples or the larger group. Jesus replied,

Who then is the faithful and sensible steward, whom his master will put in charge of his servants, to give them their rations at the proper time? Blessed is that slave whom his master finds so doing when he comes. Truly I say to you that he will put him in charge of all his possessions. But if that slave says in his heart, “My master will be a long time in coming,” and begins to beat the slaves, both men and women, and to eat and drink and get drunk; the master of that slave will come on a day when he does not expect him and at an hour he does not know, and will cut him in pieces, and assign him a place with the unbelievers. And that slave who knew his master’s will and did not get ready or act in accord with his will, will receive many lashes, but the one who did not know it, and committed deeds worthy of a flogging, will receive but few. From everyone who has been given much, much will be required; and to whom they entrusted much, of him they will ask all the more (Luke 12:41-48).

Based upon the response of Jesus, there can be little doubt that this parable is directed at those entrusted with leadership responsibility. The disciples were to be “faithful and sensible stewards” who take good care of the owner’s servants. Set against the backdrop of the return of Christ, this story serves as a sobering reminder that the steward, though holding a position of authority, is a fellow-servant accountable to the master for the way in which he treats other servants in the household. Contrasted in this story are the faithful and wise steward and the wicked steward. The faithful and wise steward, who is diligent in providing for the rest of the household servants, is promised greater authority and responsibility; while the wicked steward, who abuses his position and mistreats the other servants, faces judgment. The message is clear. Those entrusted with leadership

responsibility must remain faithful and diligent; for they will be held accountable by God for their stewardship (Bock 1996:1177-1186).

The apostle Paul also made use of this metaphor in 1 Corinthians 4:1-2, where he wrote,

Let a man regard us in this manner, as servants (ὑπηρέτης) of Christ, and stewards (οἰκονόμος) of the mysteries of God. In this case, moreover, it is required of stewards that one be found trustworthy.

According to Zodhiates (1993), the noun ὑπηρέτης originally referred to a rower in a boat and, over time, came to be applied to a servant, attendant, or assistant—essentially any subordinate official who sought to accomplish the commands of a superior. As mentioned previously, οἰκονόμος (from οἶκος, a house, and νέμω, to arrange) was originally used of one who managed the domestic affairs of a household, family business, or a minor. Over time, the term οἰκονόμος took on broader usage and was even applied to city officials.

As Clinton (2001:76-77) remarked, “Paul viewed his leadership ministry as something entrusted to him — a leadership stewardship — that he was to use and fulfill”. In this understanding of entrustment, a person views his or her call to leadership and ministry as something given by the Lord and exercised in his interest. Paul tied this sense of stewardship to his calling and destiny. He was set apart by the Lord Jesus himself to proclaim the gospel to the Gentiles; and he understood that he was accountable to God for this stewardship.

In his letter to Titus, Paul explained that the overseer (ἐπίσκοπος) “must be above reproach as God’s steward” (Titus 1:7). God entrusts church leaders with specific responsibilities and expects them to fulfill these responsibilities as those accountable to God (Hebrews 13:17). Applying this metaphor to all God’s people, Peter admonished all who received spiritual gifts of any kind to exercise them in serving one another as good stewards of God’s manifold grace (1 Peter 4:10-11). Spiritual gifts are given by the Holy Spirit primarily for the benefit of others. They are not to be used for selfish or self-exalting purposes, but to glorify God by helping others.

Clinton (1989:58) highlighted three general implications of this stewardship. Leaders must operate in humility and maintain a lifelong learning posture. Secondly, leaders must make certain of ministry tasks and challenges in terms of God's guidance. Finally, leaders must perform all that they do in all aspects of ministry as unto God.

Elliston (1992:24) summarized it well.

Spiritual leaders are entrusted with the message of the gospel, gifts for ministry, and a missiological task or ministry to perform. The commission is seen in terms of a “trust” or a “stewardship.” The leader is seen then as a trustee. Trustees are expected to guard what has been entrusted to them (1 Timothy 6:20). They are expected to employ the trust to the owner's advantage and according to His will.

4.4.3 The Leader as a Shepherd

As Kinnison (2010: 65-68) noted, the shepherd/shepherding metaphor originated in the Old Testament. Shepherds were responsible to oversee, tend, care for, and protect the sheep entrusted to them. Tending involved caring for the weak, lame, and sick. Since sheep could normally eat without assistance (when the environment allowed), the shepherd was responsible to lead the flock to places where food and water were available and safety could be assured. Shepherds moved before, within, and behind the flock, according to the need. Their presence was a comfort to the flock and created a healthy environment for reproduction. Using the staff and weapons such as the sling, the shepherd had a duty to protect the flock from predators and thieves.

Kinnison (2010:71-73) remarked that, though the shepherd motif was applied to Elohim as early as Genesis 48-49, where Jacob blessed his sons and the sons of Joseph, it was especially in the Psalms (23, 80, and 121) that YHWH was visualized as the God who guides, provides for, and protects his people. Over time, the ‘shepherd’ motif was extended to the religious and political rulers of

God's chosen people. Referring to God's appointment of David as an ideal leader, the psalmist wrote,

He also chose David His servant and took him from the sheepfolds;
from the care of the ewes with suckling lambs He brought him to
shepherd Jacob His people, and Israel His inheritance. So he
shepherded them according to the integrity of his heart, and guided
them with his skillful hands (Psalm 78:70-72).

Sadly, few of the kings who followed David demonstrated his shepherding heart, integrity, and skill. The nation's leaders failed miserably in their shepherding roles (Ezekiel 34:1-10, Zechariah 10:3 and 11:4-17) and God himself promised to send the ultimate shepherd (Isaiah 40:11, Micah 5:4) who would restore the nation.

In the New Testament, Jesus identified himself as the 'good shepherd' (John 10:1-6, 11-18). Contrasting himself with hirelings who have no regard for the sheep, Jesus claimed to be the one the sheep trust and obey, the one who lays down his life for the sheep. As the good shepherd, Jesus went after the missing sheep (Matthew 18:12-13; Luke 15:3-7) and stated plainly that his mission was to "seek and to save that which was lost" (Luke 19:10). Thus, Jesus manifested himself as the living expression of YHWH's promised shepherd and messiah (Kinnison 2010:78).

Though Jesus Christ is regarded as the "great shepherd of the flock" (Hebrews 13:10) and the "chief shepherd" (1 Peter 5:4), the term 'shepherd' is also applied to God-appointed leadership in the church. In John 21:15-17, after his resurrection, Jesus challenged the wavering Peter three times to accept responsibility to care for God's people saying, "Tend (βόσκω) my (little) lambs (ἀρνίον)" (21:15), "Shepherd (ποιμαίνω) my (little) sheep (προβάτιον)" (21:16), and "Tend (βόσκω) My sheep (προβάτιον)" (21:17). Zodhiates (1993) noted that the Greek verb βόσκω meant to tend or feed sheep and, in this context, referred metaphorically to teaching God's word as had Jesus. The verb ποιμαίνω, on the other hand, conveyed the broader responsibility of "guiding, guarding, [and] folding ... the flock as well as leading it to nourishment" (Zodhiates 1993). The use of both ἀρνίον and προβάτιον stressed the importance of feeding and caring for young and old alike.

Interestingly, it was this same Peter who, many years later, admonished church leaders (elders) to exercise their shepherding responsibilities in a way worthy of recognition from the Chief Shepherd.

Therefore, I exhort the elders among you, as your fellow elder and witness of the sufferings of Christ, and a partaker also of the glory that is to be revealed, shepherd the flock of God among you, exercising oversight not under compulsion, but voluntarily, according to the will of God; and not for sordid gain, but with eagerness; nor yet as lording it over those allotted to your charge, but proving to be examples to the flock. And when the Chief Shepherd appears, you will receive the unfading crown of glory (1 Peter 5:1-4).

Once again, the Greek verb for 'shepherd' is ποιμαίνω, which entails all the duties of a shepherd. Peter exhorts these elders to exercise oversight because they want to, not because they have to. 'Exercise oversight' is from the verb ἐπισκοπέω, meaning "to look upon, observe, examine the state of affairs of something, look after, oversee" (Zodhiates 1993). Kittel and Friedrich noted that this verb normally conveys a sense of concern for the welfare of others (Kittel, Friedrich, and Bromiley 1985:245). The noun ἐπίσκοπος, usually translated 'overseer' or 'bishop', is derived from this verb. Peter reminded church elders that oversight must be exercised with God-honoring attitudes and motives. Elders are not to exercise domineering leadership, but to lead instead by life example. As church leaders emulate the Chief Shepherd, they can be assured of future recognition and reward.

The shepherd/sheep motif was also used in Paul's farewell to the Ephesian elders in Acts 20:28. Concerned about the ever-present threat of false teachers, Paul admonished these men saying, "Be on guard for yourselves and for all the flock (ποίμνιον), among which the Holy Spirit has made you overseers (ἐπίσκοπος), to shepherd (ποιμαίνω) the church of God which He purchased with His own blood".

In Ephesians 4:11, Paul identified gifted leaders given by the Lord Jesus to the church to equip God's people for ministry. Among these are pastors/shepherds

(ποιμήν), who are linked closely with teachers (διδάσκαλος). Since pastors and teachers are linked in the Greek text by a single definite article, a close association of functions is inferred. Though some scholars (such as Hendricksen 1967:197 and Hodge 1954:226) consider these to reflect a single role (pastor/teacher or teaching pastor), O'Brien (1999:300) prefers to view the shepherd/pastor and the teacher as two types of ministers who operate within a local congregation. The identification of teachers as a separate group in 1 Corinthians 12:28-29 and Galatians 6:6² lends credence to his argument. Thus, it would seem that all shepherds/pastors teach, but not all teachers serve as shepherds/pastors.

The biblical shepherd serves as a very effective metaphor for church leadership. As 'shepherds', church leaders must 'tend' the people of God, "feeding (teaching), nurturing (exhorting, reproving, correcting, comforting), protecting, congregating (maintaining group cohesion), leading or guiding, calling to follow, knowing by name, modeling and leading in hope" (Elliston 1992:24-25). Church leaders are also warned not to practice abusive leadership or to take advantage of God's people for personal gain. They are to shepherd as representatives of the Chief Shepherd!

4.5 The Holy Spirit and Leadership Development

In their well-received book *Spiritual Leadership*, Blackaby and Blackaby (2001:42) stated,

Although childhood experiences, physical strength, failures, successes, and even birth order can impact general leadership abilities, there is an added dimension to the growth of a spiritual leader that is not found in secular leadership development. That dimension is the active work of the Holy Spirit in leaders' lives. Oswald Sanders notes: "There is no such thing as a self-made spiritual leader". Spiritual ends require spiritual means, and spiritual means come only by the Holy Spirit.

Reinforcing this perspective, Elliston (1992:99) highlighted the Holy Spirit's initializing and integrating roles in every part of the leadership development process. From selection to convergence, the Spirit of God works through personal encounter, mature leaders, the people of God, and the surrounding culture and context to facilitate, motivate, and enable growth and reproduction. As Elliston (1992:99) noted, "The Holy Spirit fills the most critical role throughout the whole process".

Though other factors certainly influence emergence, ultimately, God himself develops leaders (Clinton 1988:25). Throughout the Old Testament, God's sovereign hand was all too evident in the development of leaders such as Moses, David, Samuel, and others. In the gospels, Jesus served as the primary teacher, trainer, and mentor for his followers. After His ascension, however, the Holy Spirit quickly emerged as the primary developer of emerging leaders. To better understand the work of the Holy Spirit in the lives of emerging leaders, it behooves us to examine the Spirit's role in the life and ministry of Jesus.

4.5.1 The Holy Spirit in the Life of Jesus

Throughout scripture, the Holy Spirit is the primary 'enabler' of God-appointed leaders. This was also true of the Lord Jesus. It is intriguing to note that, although conceived by the Holy Spirit (Matthew 1:18-20, Luke 1:35), Jesus himself was anointed with the Holy Spirit after his baptism under John (Matthew 3:16, Mark 1:10, Luke 3:22, John 1:32-33). Not only did this enable John to recognize Jesus as the Messiah and the one who baptizes in the Holy Spirit, but it also marked the beginning of Jesus' public ministry and manifestation of power. From that point on, the gospel writers described Jesus as "led by the Spirit" (Matthew 4:1) and "full of the Holy Spirit" (Luke 4:1). Luke noted that Jesus operated "in the power of the Spirit" (Luke 4:14); and Matthew quoted Jesus as saying that he cast out demons by the Spirit (Matthew 12:28). Luke even mentioned that Jesus "rejoiced greatly in the Holy Spirit" (Luke 10:21). Indeed as Anthony (2008:153) remarked, "Jesus conducted his ministry through the Holy Spirit — teaching, discipling, confronting, exorcising demons, and walking with

God — by means of the Spirit's resources and power (Matt. 12:22-29; Luke 4:14-21)".

The Holy Spirit enabled the supernatural ministry of Jesus. Referring to himself at the synagogue in Nazareth, Jesus quoted Isaiah 61:1-2 saying,

The Spirit of the Lord is upon Me, because He anointed Me to preach the gospel to the poor. He has sent Me to proclaim release to the captives, and recovery of sight to the blind, to set free those who are oppressed, to proclaim the favorable year of the Lord (Luke 4:18-19).

That the apostles eventually understood the source of Jesus' power is evident in Peter's statement to the household of Cornelius,

You know of Jesus of Nazareth, how God anointed Him with the Holy Spirit and with power, and how He went about doing good and healing all who were oppressed by the devil, for God was with Him (Acts 10:38).

If the Lord Jesus operated in such dependence upon the Holy Spirit, how much more should leaders today!

4.5.2 Jesus' Teaching on the Holy Spirit

As the time of Jesus' crucifixion, resurrection, and ascension approached, Jesus increasingly spoke of the Holy Spirit's future role in the disciples' lives and ministries. Anthony (2008:154) noted that Jesus foretold the coming of "another Paraclete" (Helper, Comforter, Counselor), the "Spirit of truth", who would be with the disciples forever (John 14:16-17). The Holy Spirit would teach them "all things" and remind them of what Jesus had previously taught (John 14:26). The Spirit would testify concerning Jesus, as would disciples the Spirit enabled (John 15:26-27). Never speaking on his own initiative, the Holy Spirit would also guide the disciples into all truth and inform them of what was to come (John 16:13-15). Jesus stated, "He shall glorify Me; for He shall take of Mine, and shall disclose it

to you” (John 16:14). Jesus also assured the disciples that the Holy Spirit would enable them to face future opposition with confidence.

When they bring you before the synagogues and the rulers and the authorities, do not worry about how or what you are to speak in your defense, or what you are to say; for the Holy Spirit will teach you in that very hour what you ought to say (Luke 12:11-12).

4.5.3 The Holy Spirit and Leadership in the Early Church

Shortly after his resurrection, Jesus commissioned the disciples saying, “As the Father has sent Me, I also send you” (John 20:21). Reminiscent of God breathing life into the first man (Genesis 2:7), Jesus breathed on them and said, “Receive the Holy Spirit”. As the Spirit indwelt Jesus, so the same Spirit would now indwell them. However, Jesus had much more in store for his disciples. Shortly before his ascension, he informed them that he was about to send forth upon them the promise of his Father, and that they were to remain in the city until they were clothed with power from on high (Luke 24:49).

The parallel account in Acts 1:4-8 gives more detail. Perhaps ten days before Pentecost, Jesus gathered his disciples and commanded them to wait in Jerusalem for the promised baptism in the Holy Spirit (Acts 1:4-5). They had already received the indwelling Spirit; now they were to receive his power! As Jesus culminated the discussion, he promised, “You will receive power when the Holy Spirit has come upon you; and you shall be My witnesses both in Jerusalem, and in all Judea and Samaria, and even to the remotest part of the earth” (Acts 1:8). The Greek word for ‘power’ is δύναμις. According to Betz (1976:601-605), δύναμις suggests the inherent capacity to carry something out, often in a spontaneous sense. From Homer on, this word was used of the ability to achieve. In the New Testament, it denotes the power of God, or what might be termed ‘miraculous power’. It is important to note that this power would be received when the Holy Spirit came upon them (in much the same way he came upon Jesus after his baptism). This ‘baptism in the Spirit’ would precede the mission of taking the good news to the ends of the earth.

When the day of Pentecost arrived, the disciples were gathered together in one place. The Holy Spirit came upon them and they immediately began speaking of the mighty deeds of God in the languages of all those present at the feast (Acts 2:1-11). This attracted a large crowd and a transformed Peter stepped forward, proclaiming that they were witnessing the fulfillment of the outpouring of the Holy Spirit prophesied in Joel 2:28-32. Enabled by the Holy Spirit, Peter spoke with great effect, attesting to Jesus as both Lord and Christ, with the result that some 3000 people were added to the church in one day (Acts 2:14-41). As Anthony (2008:155) noted, this was one of the most significant events in world history. Not only was it the fulfillment of the long-awaited outpouring of the Holy Spirit upon God's people, but this event also marked the inauguration of the new covenant, the birth of the church, and the launch of a worldwide mission.

The book of Acts highlights the prominent role of the Holy Spirit among leaders in the early church. Peter, Paul, and others were "filled with the Spirit" when facing challenging situations (see Acts 4:8, 4:31, 13:9, 13:52). In Acts 4:31, after Peter and John were threatened by the religious leaders, the believers prayed and were filled with the Holy Spirit and began to speak God's word with boldness. When conflict about food distribution among widows arose, the apostles asked the people to select "men of good reputation, full of the Spirit and of wisdom" (Acts 6:3). One such man, Stephen, was powerfully used by God to testify concerning Jesus and soon found himself before the council. His Spirit-enabled challenge so convicted and infuriated the religious leaders that he was stoned to death (Acts 6:8-7:60).

On a number of occasions, the Holy Spirit gave specific instructions to assist in the furtherance of God's missional purposes. Philip was directed to the Ethiopian eunuch (Acts 8:29). Peter was instructed to go to the house of Cornelius (Acts 10:19-20). Agabus was directed to prophesy about an impending famine (Acts 11:28). Later, he would warn of Paul's impending arrest by the Jews at Jerusalem (Acts 21:10-11). Church leaders at the Jerusalem council yielded to the Holy Spirit's direction concerning Gentile believers (Acts 15:28). The apostle Paul and his missionary team were guided by the Spirit from destination to destination (Acts 16:6-7).

A thorough reading of the Book of Acts highlights the central leadership role of the Holy Spirit in the early church. The church's leaders clearly demonstrated a profound sensitivity to and dependence upon the Holy Spirit; and the fruit was evident. If churches of tomorrow are going to fulfill their missional and developmental mandates, then leaders will have to move past the relatively unspiritual, utilitarian approaches so common today and learn afresh how to operate in the wisdom, leadership, and power of the Holy Spirit.

4.5.4 The Spirit's Role in the Selection and Appointment of Leaders

In addition to leading and empowering the early church, the Holy Spirit was involved in the selection and appointment of church leaders. In Acts 13:1-4, the Spirit spoke to the leadership team at the Antioch church saying, "Set apart for Me Barnabas and Saul for the work to which I have called them". After the leadership team fasted and prayed, they laid hands upon these two men, and they departed for Cyprus, "being sent out by the Holy Spirit".

As one who had himself been set apart by the Holy Spirit, the apostle Paul recognized and acknowledged the role of the Spirit in leadership selection. In his farewell address to the Ephesian elders (Acts 20:17-38), Paul passionately pled with these men, entreating them to "be on guard for yourselves and for all the flock, among which the Holy Spirit has made you overseers (ἐπίσκοπος), to shepherd (ποιμαίνω) the church of God which He purchased with His own blood" (Acts 20:28). Appointed by the Spirit, they were responsible to lead effectively as shepherds entrusted with the stewardship of God's flock.

4.5.5 The Holy Spirit in the Writings of Paul

Zuck (1998:20-21) noted the significant role the Holy Spirit played in the life and writings of Paul. Paul openly confessed that his message came with the Holy Spirit's power (1 Corinthians 2:4, Romans 15:18-19, 1 Thessalonians 1:5), and that it is the Spirit who reveals all that God has for his people (1 Corinthians 2:9-12). Speaking from a platform of personal experience (Acts 9:17; 13:9), Paul exhorted believers to be continually filled with (controlled by) the Spirit

(Ephesians 5:18). In addition, Paul wrote the Corinthians on the central role of the Spirit in the distribution and operation of spiritual gifts for ministry (I Corinthians 12-14). Paul himself was the focus of a Spirit-directed prophetic word delivered by Agabus (Acts 21:10-11) and later received prophetic insight about the future through the Holy Spirit (1 Timothy 4:1). The apostle Paul also highlighted the vital role the Spirit plays in spiritual battle. The Ephesians were instructed to take up the sword of the Spirit, which is God's word, and to pray at all times in the Spirit, interceding for others (Ephesians 6:17-18). Paul noted that, even in our weakness, the Spirit intercedes for us (Romans 8:26-27). So important is the Spirit's role in the vitality of the church that Paul exhorted the Thessalonians, "Do not quench the Spirit" (1 Thessalonians 5:19), a challenge that could easily be echoed today.

As both Jesus and Paul taught and demonstrated, the Holy Spirit plays a central role in the life of the Christian leader. Ever increasing Christ-likeness is essential for leadership credibility. It is not enough for emerging leaders to operate on giftedness or talent alone; for godly leadership is built upon character (Malphurs 2003:56). As Anthony (2008:156) noted, the Spirit of God continues to work powerfully in true Christians (and Christian leaders) over a lifetime, progressively transforming them more and more into the image of Jesus Christ.

Indeed, the Holy Spirit is particularly responsible for sanctification, the ongoing process by which Christians break more and more with sin and become more and more like Christ (Anthony 2008:156).

Barrick (2010:180) remarked that the initial positional sanctification believers receive in Christ demands progressive sanctification — "the demonstration of an outward and progressive holiness in the life of the saint". When people receive Christ and experience regeneration (the new birth), both the word of God (the incorruptible seed of 1 Peter 1:23) and the Holy Spirit (John 3:5-8, Titus 3:5) are key to the process. In progressive sanctification, the same is true. The Holy Spirit uses God's word to facilitate an inner transformation that becomes evident in outward behavior. Though critical for every believer, this is especially important for emerging leaders!

Acknowledging the Holy Spirit as the source of victory over sin, Paul instructed the Galatians to “walk in the Spirit” (Galatians 5:16-25). In doing so, the character of Christ would be evident in their lives. Similarly, to the Romans Paul spoke of a victorious life with the “mind set on the Spirit”, putting to death the deeds of the body, and being led by the Spirit as grown children of God (Romans 8:5-16).

Concerning this ongoing role of sanctification, the apostle Paul wrote,

Now the Lord is the Spirit, and where the Spirit of the Lord is, there is liberty. But we all, with unveiled face, beholding as in a mirror the glory of the Lord, are being transformed into the same image from glory to glory, just as from the Lord, the Spirit (2 Corinthians 3:18).

A marvelous term, ‘transformed’ is from μεταμορφώω, which conveys the idea of change from one form to another (Liefeld 1976:861-864). The etymological source of the English term ‘metamorphosis’, this image-rich word is also applied to the outcome of the renewal of the mind (Romans 12:2) and the transfiguration of Jesus (Matthew 17:12, Mark 9:2). Due to the importance of transformation in the emerging leaders’ life, this will be examined in a later section of this chapter.

4.5.6 The Holy Spirit in Teaching and Learning

Both leaders and emerging leaders alike must rely on the Holy Spirit’s enablement in the teaching and learning process. Yount (2008:75) stated plainly that Christian teaching and learning apart from the Holy Spirit are meaningless. The Holy Spirit is himself a teacher and, for the church, *the* teacher of truth (Anthony 2008:159). In John 14:26, Jesus told his disciples that when the Spirit came, he would teach them all things and bring to remembrance all that Jesus had said. Second, the Holy Spirit is actively involved in the supernatural transformation of learners and leaders alike through the teaching-learning process (Yount 2008:76-77). God’s Spirit facilitates this process of growth and change by motivating and opening the understanding of the learner, on the one hand, and enabling and empowering the teacher on the other. In 1 Corinthians 2:12-13, the apostle Paul wrote,

Now we have received, not the spirit of the world, but the Spirit who is from God, so that we may know the things freely given to us by God, which things we also speak, not in words taught by human wisdom, but in those taught by the Spirit, combining spiritual thoughts with spiritual words.

As the 'Spirit of truth', the Holy Spirit teaches biblical truth, guiding and nurturing receptive learners and developing them more and more into the image of Christ (Anthony 2008:159; Yount 2008:77).

Dickason (1991:121) commented,

The Holy Spirit is the sovereign, most wise, and ultimate teacher of spiritual truth. He makes God's truth relevant to the persons involved and enables application that causes life and growth. Our teaching and learning efforts are in vain unless we cooperate with the Holy Spirit.

The Holy Spirit as 'teacher' and dispenser of gifts blesses certain members of the body of Christ with a teaching gift. As Yount (2008:83) noted, the spiritual gift of teaching is mentioned in Romans 12:7 and 1 Corinthians 12:28. In Ephesians 4:11, the teacher is mentioned together with the pastor (shepherd) as a gifted individual given to the church. The Holy Spirit uses gifted teachers to equip, prepare, and train God's people for ministry in order to build up the body of Christ (Yount 2008:83). In the development of emerging leaders, church leaders must depend upon the Holy Spirit for wisdom and enablement and make use of gifted individuals in the body of Christ.

4.5.7 The Development of Giftedness

The development of giftedness is essential for effectiveness in ministry. As such, leadership development 'programs' must facilitate the emergence of spiritual gifts and the development of talents and skills in emerging leaders. Leaders possess three types of giftedness: natural talents, learned skills, and spiritual gifts (Clinton 1989:8). Natural talents are inherent and can be developed. Skills can be learned or enhanced to increase ministry effectiveness. 'Spiritual gifts', however,

are distributed by the Holy Spirit as the Spirit wills (1 Corinthians 12:11). Clinton (1989:365) defined a spiritual gift as “a unique capacity for channeling a Holy Spirit led ministry in and through the life of a believer”. Most people involved in Christian leadership are multi-gifted. Wagner (1979:41) labeled the set of gifts in which a leader normally operates a ‘gift mix’.

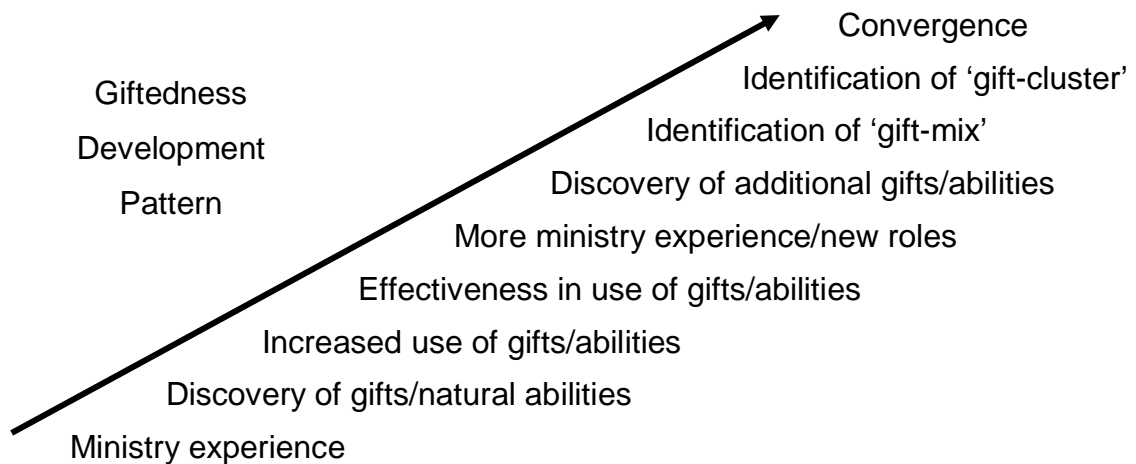
Through his research on giftedness development in emerging leaders, Clinton (1989:165) was able to discern a rather typical “discovery process of identifying, adding to, and building upon one’s natural abilities, acquired skills, and spiritual gifts”. Though there are most certainly variations, the giftedness discovery process generally evolves from an early emphasis on natural abilities and acquired skills to a focus on spiritual gifts and supplemental skills that enhance ministry effectiveness.

As Clinton (1989:365) noted, spiritual gifts are often discovered through early ministry experiences and tend to develop through increased use. This is one reason it is so important for emerging leaders to develop in an authentic ministry context and for established leaders to provide emerging leaders with real ministry opportunities. As gifts emerge in the context of authentic ministry, the realization of increased ministry effectiveness gives impetus to the development of the gift, and possibly the discovery and development of other gifts. New ministry experiences or roles can also stimulate the release or discovery of other gifts.

Over time, the emerging leader begins to identify and operate in a God-given ‘gift mix’. This gift mix generally features a cluster of harmonious spiritual gifts centered around a dominant ministry gift. This gift mix correlates with and gives direction to the leader’s ministry. At the same time, the inner drive to achieve ministry competence will motivate the leader to develop natural talents further and to acquire additional skills. As leaders mature, they tend to develop a ‘giftedness set’. Made up of natural abilities, acquired skills, and spiritual gifts, this giftedness set tends to define the leaders’ stewardship potential and capacity to influence (Clinton 1989:13). Because it is vital for effective ministry, church-based leadership development initiatives need to teach emerging leaders about the various forms of giftedness and provide opportunities for their development under the supervision of more mature and experienced leaders.

Figure 4.1: Giftedness Development Pattern

(adapted from Clinton 1989:365)



4.5.8 Spiritual Gifts

There has been considerable debate on the subject of spiritual gifts; and a number of perspectives have been advanced. It is not within the parameters of this project to examine this issue. Nonetheless, this section is predicated upon the assumption that the Holy Spirit is still actively at work in and through God's people.

Jesus himself gives gifted leaders to the church (Ephesians 4:11); but the special ministry abilities these leaders exercise in order to fulfill their ministry responsibilities in the body of Christ are given by the Holy Spirit (1 Corinthians 12:4-11). However, it is not just recognized leaders who are to operate in spiritual gifts. The apostle Peter stated that all of God's people have been gifted in some way.

As each one has received a special gift, employ it in serving one another as good stewards of the manifold grace of God. Whoever speaks, is to do so as one who is speaking the utterances of God; whoever serves is to do so as one who is serving by the strength which God supplies; so that in all things God may be glorified through Jesus Christ (1 Peter 4:10).

In this passage, Peter identified two types of gifts — speaking gifts and serving gifts — both of which are supernaturally enabled. These gifts are given to individuals to enable them to serve (or minister to) others. The exercise of spiritual gifts involves stewardship; for these gifts are a means of administering God's grace. Spiritual gifts are to be exercised in such a way that God is glorified. They are not indicators of maturity or status and should never be regarded as such by those who exercise them.

As Anthony (2008:157) noted, the Spirit sovereignly assigns gifts to believers, including teaching, leading, faith, serving, mercy, and others. The gifts are intended for the building up and strengthening of the church; and they are to be exercised for the 'common good' (1 Corinthians 12:7). In this way, all gifted believers exercise some form of 'leadership' in the body of Christ.

Paul lists a number of spiritual gifts in 1 Corinthians 12 and a number of gift-based ministry roles in Romans 12:3-8. There have been attempts to classify and define these various gifts, but that discussion is beyond the scope of this project. Though both of these passages list various spiritual gifts and ministry roles, the broader context is on attitude and the profitable use of spiritual gifts in the body of Christ.

As Paul indicated, the Holy Spirit is the source of spiritual gifts; and these gifts are distributed as the Spirit wills (1 Corinthians 12:4-11). Gifts are given to various individuals so that they can serve the Lord Jesus Christ and build up his body, all under the aegis of the Father (Walvoord and Zuck 1983:533). All spiritual gifts are important; and all are needed in the body of Christ. Since these special enablements are given as a divine favor, there is no cause for pride in the possession or exercising of a spiritual gift (Fisher 1975:195).

In Paul's interaction with Timothy, we see both the value the apostle placed on his protégé's gifting and a means by which the development and practice of gifted ministry can be encouraged. So important was Timothy's gifting that Paul wrote him saying, "Do not neglect the spiritual gift within you, which was bestowed on you through prophetic utterance with the laying on of hands by the presbytery" (1 Timothy 4:14). In spite of the recognition and approval of the eldership, Timothy

seems to have struggled with timidity. As such, Paul echoed this admonition in his second letter, reminding Timothy that he himself had laid hands on him. “For this reason I remind you to kindle afresh the gift of God which is in you through the laying on of my hands. For God has not given us a spirit of timidity, but of power and love and discipline” (2 Timothy 1:6). Paul was not shy to admonish leaders who were not living up to their potential. Concerning an emerging leader in Colossae, he wrote, “Say to Archippus, ‘Take heed to the ministry which you have received in the Lord, that you may fulfill it’” (Colossians 4:17). Encouragement and admonition from respected leaders can stimulate emerging leaders to exercise their ministry role more effectively and fulfill their responsibilities in the Lord.

The Holy Spirit plays a critical role in the church of Jesus Christ. To be effective in accomplishing God’s purposes, leaders need to be led and empowered by the Holy Spirit. To encourage growth in this area among emerging leaders, mature leaders must model life in the Spirit, teach from scripture on the Holy Spirit, and mentor emerging leaders as they learn to operate in the Spirit. In addition, church leaders must create an environment in which the Holy Spirit is free to work in and through the body of Christ. Since spiritual gifts are a primary means through which God’s grace is administered, emerging leaders must be encouraged to develop and apply their giftedness in a way which builds up the body of Christ and honors God.

The role of the Holy Spirit is critical to effective leadership and leadership development. Churches would be foolish to undertake the development of spiritual leaders in the limitations of human wisdom and power. As Blackaby and Blackaby (2001:245) concluded,

Ultimately, spiritual leadership comes as a result of the working of the Holy Spirit. It is the Holy Spirit who reveals God’s will to people. It is the Holy Spirit who equips people to lead others. It is the Holy Spirit who guides leaders and authenticates their leadership before people. It is, therefore, essential that leaders cultivate a deeply personal and vibrant relationship with God as they strive to become the kind of leader God wants them to become.

4.6 Toward Biblical Transformation

One of the most important developmental processes for emerging leaders is that of biblical 'transformation'. The Center for Christian Leadership (2004:11) at Dallas Theological Seminary described transformation as

the process by which God forms Christ's character in believers by the ministry of the Spirit, in the context of community, and in accordance with biblical standards. The process involves the transformation of the whole person in thoughts, behaviors, and styles of relating with God and others. It results in a life of service to others and witness for Christ.

Reggie McNeal (2000:x) noted with regret that most Christian leadership development efforts today focus excessively on the 'how to' of leadership and ministry and neglect the more essential aspects of the heart. With an increasingly utilitarian focus on outward success, training and equipping processes tend to emphasize the mechanical/technical aspects of ministry, but pay insufficient attention to the formational needs of spiritual leaders. In too many cases, functionalism has replaced formation.

Clinton's (1988:25) leadership emergence theory states that God develops leaders over a lifetime. Development is a function of 'processing' (the events and people God uses to impress important lessons on the emerging leader), time, and responsiveness. Processing is transformational in nature. God works throughout a leader's life to deepen character and to mature ministry. The growth of a leader's character and relationship with God overflows into his or her ministry, enhancing credibility and spiritual authority (Clinton 1988:154-155). Since "effective spiritual ministry flows out of being..., God is concerned with our being" (Clinton 1988:13). Growth in 'being' increases effectiveness in 'doing'. Though ministry and leadership skills are important, the formation of character is foundational to the process of Christian leadership development. Any church seeking to develop Christian leaders must be careful to cooperate fully with the Holy Spirit in the character development process.

4.6.1 The Call to Transformation

In Romans 8:28-29, the apostle Paul described one of God's great purposes for his children. As those "called according to his purpose", God's people are marked out for the special purpose of being "conformed to the pattern, the model, or the image of his Son", a process of transformation that takes place over a lifetime (Walvoord and Zuck 1983:474, Douglas and Comfort 1998). As Paul shifted his focus in Romans 12 from the doctrinal to the practical, he issued a profound challenge designed to help facilitate this process.

I urge you, brethren, by the mercies of God, to present your bodies a living and holy sacrifice, acceptable to God, which is your spiritual service of worship. And do not be conformed to this world, but be transformed by the renewing of your mind, so that you may prove what the will of God is, that which is good and acceptable and perfect. (Romans 12:1-2).

Not only are the people of God to offer their bodies freely as a lifelong sacrifice in the service of God, they are to refuse to be conformed to the surrounding culture, undergoing instead a process of transformation. The word 'conformed' is from συσχηματίζω and carries the idea of outwardly conforming to a pattern which is not necessarily a reflection of what is within; whereas 'transformed' comes from μεταμορφόομαι and speaks of "the act of a person changing his outward expression from that he has to ... an expression which comes from and is representative of his inner being" (Wuest 1955:206-207). "Be transformed" is present passive imperative and conveys the idea of "keep on being transformed" (Walvoord and Zuck 1983:487). This ongoing transformation results from the "renewing of the mind". The word 'renewing' is from ἀνακαίνωσις, which conveys not only the idea of renewal but renovation as well, "a complete change for the better" (Thayer and Smith 1999). As Walvoord and Zuck (1983:487) noted, the 'mind' (νοῦς) is the key to this change. As the control center of attitudes, thoughts, feelings, and actions, it must undergo continual renewing or 'renovation'. As such, instead of allowing themselves to be pressed into the world's mold, God's people are to submit to a process of 'inside-out' change that enables them to discern and practice God's will. If such a process is vital for

every Christian, how much more important is this for those being developed for leadership in the body of Christ!

4.6.2 Factors that Contribute to Transformation

As Richards (1975:22) observed, scripture indicates that transformation, the “experience and expression” of new life in Christ, is progressive. Spiritual leaders do not suddenly mature and become like Christ the moment they are ‘born again’. A lasting change in attitude and behavior requires a change in thinking and core values.⁴⁴ As root beliefs and core values change and become increasingly aligned with the truth of God’s word, so perception, discernment, thinking, and decision-making change.

Paul’s teaching in 2 Corinthians 3:17-18 and Ephesians 4:22-24 give us some additional insight into the factors involved in transformation.

Now the Lord is the Spirit, and where the Spirit of the Lord is, there is liberty. But we all, with unveiled face, beholding as in a mirror the glory of the Lord, are being transformed into the same image from glory to glory, just as from the Lord, the Spirit (2 Corinthians 3:17-18).

The Holy Spirit is at work in every believer’s life transforming the individual into the image of Christ. In 1 Corinthians 2:10-12, Paul stated that we have received the Spirit from God so that we may know the things freely given to us by God. Because of this, we can have and operate in the mind of Christ (1 Corinthians 2:16).

Believers and, in particular, emerging leaders are active contributors to their own transformation. As Clinton (1989:359) suggested, response to God’s processing directly affects a leader’s emergence. The failure to respond to the working of the Holy Spirit in a cooperative way retards the process of transformation. In light of this, perhaps the most important contribution an emerging leader can make to

⁴⁴ The essence of transformative learning. See section 3.3.8.

his or her transformation is simple cooperation. If emerging leaders allow the Holy Spirit to expose and address unbiblical values, faulty perspectives, deception, sin, and emotional wounds, then transformation can occur. In transformative learning,⁴⁵ there must be the willingness to question assumptions and beliefs and to embrace perspectives that are more in line with reality (in this case, the truth of God's word). The Holy Spirit uses a number of elements to advance this process, including trials, scripture, prayer, and other people (Walvoord and Zuck 1983:487). Church leaders have a responsibility to discern the working of the Spirit and to work together with God in the facilitation of this vital process.

The practical day-to-day mindset of believers is critical to the process. Paul urged the Colossians (3:2-3), "Set your mind on the things above, not on the things that are on earth. For you have died and your life is hidden with Christ in God." To the Romans (8:6) he wrote, "The mind set on the flesh is death, but the mind set on the Spirit is life and peace".

In Ephesians 4:11-16, Paul stressed the importance of growing up into full maturity in Christ. After describing the plight of unsaved Gentiles, Paul challenged God's people not to think and live like those who do not know God, but rather to

lay aside the old self, which is being corrupted in accordance with the lusts of deceit, and ... be renewed in the spirit of your mind, and put on the new self, which in the likeness of God has been created in righteousness and holiness of the truth (Ephesians 4:22-24).

O'Brien (1999:329) noted with interest that Paul used two aorist infinitives to describe the putting off of the old self and the putting on of the new. These actions are depicted as a complete whole. In contrast, Paul's use of the present passive infinitive in reference to the renewal of the mind indicates that this is an ongoing process.

⁴⁵ Transformative learning is discussed in section 3.3.8.

Another key factor in growth and development (and indeed the renewal of the mind) is God's word. The apostle Peter admonished believers to "grow in the grace and knowledge of our Lord and Savior Jesus Christ" (2 Peter 3:18). In his first letter, Peter urged new believers to "long for the pure milk of the word, so that by it you may grow in respect to salvation" (1 Peter 2:2). Jesus himself taught his disciples, "If you continue in My word, then you are truly disciples of Mine; and you will know the truth, and the truth will make you free" (John 8:31-32). Paul reminded Timothy, "All Scripture is inspired by God and profitable for teaching, for reproof, for correction, for training in righteousness; so that the man of God may be adequate, equipped for every good work" (2 Timothy 3:16). For leadership development processes to be effective, they must be centered in God's word.

Transformation not only involves the Holy Spirit, a willing learner, and the word of God, it also involves the community of believers (especially Christian leaders and disciple-makers). An examination of the relationship between Jesus and the Twelve, coupled together with contemporary research, moved Ogden (2003:154) to identify "intimate, accountable relationship" as a foundational element for transformational development within the context of discipleship. According to Ogden (2003:153-174), a transformational environment is characterized by ever-increasing levels of trust and the transparency this brings. Trust is built as people walk together through life's situations, affirming and encouraging one another, listening to one another, edifying each other, confessing their faults and struggles, and supporting one another in prayer. Church leaders who undertake leadership development initiatives must consider the important dynamic of a spiritual learning community. When coupled with the study and application of the truth of God's word, this openness leads to accelerated spiritual growth, character development, and preparation for service.

4.6.3 Willard's Perspective on Transformation

According to Dallas Willard (2002:22), spiritual formation for God's people refers to a Spirit-driven process through which the inner world of the believer becomes like the inner world of Jesus Christ. It involves the "processes through which

people are inwardly transformed in such a way that the personality and deeds of Jesus Christ naturally flow out from them” (Willard 2006). Spiritual formation could and should be the process by which those who are Jesus’ apprentices or disciples come easily to “do all things whatsoever I have commanded you.” Though it may seem chaotic at times, spiritual formation is an orderly process which requires the willing cooperation of the developing leader, in much the same way that Jesus expected the Twelve to submit to his discipleship process (Willard 2002:10).

Willard’s (2002:84-85) understanding of personal transformation is based on what he calls the ‘VIM’ model. VIM stands for vision, intention, and means. According to this model, transformation occurs when a desirable state of being is envisioned, an intention to realize this vision is actuated, and means are applied to fulfill the intention, producing the desired state of being.

The vision that underlies this process of transformation is a vision of Kingdom life — “life now and forever in the range of God’s effective will”, life that partakes in the divine nature and participates together with God in accomplishing his purposes — the kind of life Jesus modeled (Willard 2002:86-87). Jesus lived this Kingdom life, and through the Holy Spirit, he now makes it possible for others to live it as well. Followers demonstrate intention to live in the Kingdom by intending to obey the example and teachings of Christ. It is not a matter of intellectual assent or mere knowledge. Intention must be brought to fruition by a decision to follow through on the intention (Willard 2002:88). The vision and the solid intention to obey Christ naturally lead to the seeking and application of means to that end. As Willard noted (2002:89), no follower of Jesus is left to pursue this on his own. Valuable and helpful resources are available in the example of Jesus, the teaching and promises of scripture, the community of believers, and the Holy Spirit. The simple and straightforward aim of this ‘inside-out’ process is to bring every element of one’s being into harmony with God’s will (Willard 2002:93).

This process of transformation moves an emerging leader from operating according to the culturally (and carnally) defined ‘impulsive will’ to the ‘reflective will’, which considers thoughts and actions in the light of God’s word, to the

‘embodied will’, where one is so aligned with the will of God that one’s automatic responses are a mirror reflection of God’s heart (Willard 2006).

Spiritual formation in Christ would, then, ideally result in a person whose reflective will for good, fully informed and possessed by Christ, has settled into their body in its social context to such an extent that their natural responses were always to think and feel and do as Christ himself would (Willard 2006).

4.6.4 Implications for Church-based Training and Development

Though the Holy Spirit is the initiator in transformation, both the emerging leader and those around him or her play an important role in the process. Transformational growth is essentially synergistic. Kettenring (2008:108-109) noted that for the inner life to be changed “one must intentionally engage in actions that effectively address issues of heart (i.e. will and spirit) and mind (i.e. thoughts and emotions)”.

Willard (2002:235) emphasized that if church leaders are serious about this type of spiritual formation, then it must become the primary goal of the church. Leaders who want to stimulate a hunger for transformation must seek to model a transformed life. Emerging leaders must be able to see ‘Kingdom life’ portrayed. If it cannot be portrayed, then it must at least be envisioned and proclaimed as a mutual goal for the whole congregation. In addition, church leaders, trainers, and/or disciplers must facilitate relevant exposure to and engagement with God’s word, especially in areas of deficiency, with the support of other believers or leaders. Accountable relationships serve to facilitate growth. This can be accomplished through effective teaching in small groups or a learning community, assignments with reflective exercises, mentoring, unique spiritual encounters, and guided personal study.

Willard (2002:240-251) concluded that effective transformation in the context of the local church requires three key elements.

- Making disciples (apprentices) of Jesus who learn not only what he taught but, equally as important, how to live it. As in the gospels, the very essence of discipleship requires the giving up of one's life to Jesus.
- Immersing these apprentices at all levels of growth in the Trinitarian presence, thus moving them out of a performance mentality into an authentic understanding of the fatherhood of God, the all-sufficiency of Christ, and enablement of the Spirit.
- Intending and arranging for the inner transformation of disciples. The will must be moved by spiritual insight into biblical truth and reality. This happens as the Holy Spirit works through God's word and people. In cooperation with the Spirit, churches must organize for spiritual formation, providing opportunities for engagement and growth.

As Clinton (1988:199) intimated, when God calls people into Christian ministry, it is his desire to develop them to their full potential in Christ. Emerging leaders are responsible to submit to God's developmental processes; and other leaders are responsible to discern what God is doing and help facilitate the process as the Spirit leads.

The emerging Christian leader progresses in sanctification through the ministry of the Holy Spirit and through attention to the teaching of scripture (Barrick 2010:179) . One cannot ignore the important role the community of believers plays in this process. However, in the end, emerging leaders themselves hold the key. By the grace of God, they must believe and live out what they have received in Christ (Barrick 2010:179).

4.7 Selection

Clinton (1989:69) recognized leadership selection as a major function and responsibility of biblical leadership. Indeed, "effective leaders view leadership selection and development as a priority function" (Clinton 2001:132). As Clinton observed, ultimately, God himself is responsible for the emergence of leaders; but leaders in the body of Christ are responsible to be sensitive to others with leadership potential and to work with the Holy Spirit to promote their

development. This proactive approach to leadership development was characteristic in the ministries of Jesus Christ and the apostle Paul.

Selection is a critical part of the leadership development process. Significantly, God himself initiates the selection process, sovereignly preparing and stirring an individual to aspire to leadership. Observant and spiritually sensitive leaders recognize and affirm what God is doing in such individuals and work together with the Holy Spirit to facilitate the emerging leader's development (Clinton 2001:132-133). The selection and development process is threefold, involving God, the called individual, and other leaders.

Churches and organizations today often frustrate the leadership development process. Whether through ignorance or by design, a restrictive, overly controlled and/or highly structured environment makes little room for new leaders to emerge. In addition, with emphasis often placed on running programs instead of growing people, processes of biblical discipleship and equipping are thwarted. This problem is compounded by common hiring practices. When looking for new leaders, instead of seeking to grow their own, many churches and organizations pursue secular hiring practices, looking for those 'best qualified' for the job. Sadly, because emphasis is often placed upon charisma and competence, issues of character are often belied.

4.7.1 The Selection of the Twelve

From the beginning, it was Jesus' intent to select and train a group of people who would assume leadership of the fledgling church after he ascended. As Bruce (1971:1) noted, the twelve disciples selected by Jesus were to be his witnesses in the world after he departed. It would be their responsibility to give a faithful account of Jesus' words and deeds, an accurate image of His character, and a true reflection of his heart and mission.

The most detailed description of Jesus' selection of the Twelve is found in Luke 6:12-16.

It was at this time that He went off to the mountain to pray, and He spent the whole night in prayer to God. And when day came, He

called His disciples to Him and chose twelve of them, whom He also named as apostles: Simon, whom He also named Peter, and Andrew his brother; and James and John; and Philip and Bartholomew; and Matthew and Thomas; James the son of Alphaeus, and Simon who was called the Zealot; Judas the son of James, and Judas Iscariot, who became a traitor.

Mark 3:13-19 described this process accordingly.

And He went up on the mountain and summoned those whom He Himself wanted, and they came to Him. And He appointed twelve, so that they would be with Him and that He could send them out to preach, and to have authority to cast out the demons. And He appointed the twelve: Simon (to whom He gave the name Peter), and James, the son of Zebedee, and John the brother of James (to them He gave the name Boanerges, which means, "Sons of Thunder"); and Andrew, and Philip, and Bartholomew, and Matthew, and Thomas, and James the son of Alphaeus, and Thaddaeus, and Simon the Zealot; and Judas Iscariot, who betrayed Him.

In the days before this event, Jesus had come under increasing criticism from the Pharisees and the scribes for what they deemed to be Sabbath violations. There can be little doubt that Jesus discerned the long-term outcome of this conflict and was moved to seek the Father's counsel in prayer.

When Jesus selected the Twelve, he chose them from among the larger group of committed followers. A number of those chosen had received prior invitations to follow and had gradually devoted more and more time to accompanying Jesus.

Referencing Bruce (1971:11), Ogden (2003:61-63) explained that the selection process described in Luke 6:12-16 and Mark 3:13-19 was actually the third stage in an extended recruiting and selection process, preceded by 'come and see' and 'follow me' admonitions some time earlier. The initial 'seeking' stage is described in the first chapter of John's gospel and does not seem to be reported by the other gospel writers. Through John the Baptist (John 1:36-38), Andrew and an

unnamed disciple (possibly John) were introduced to Jesus, who invited them to spend the day with him to 'check him out'. These men were looking for the Messiah. Apparently convinced, Andrew then found his brother Simon (Peter), announcing "We have found the Messiah" (John 1:41). Jesus met Simon and nicknamed him Cephas (Peter). Shortly thereafter, Jesus found Philip and issued a straightforward invitation, "Follow me" (John 1:43). Philip, in turn, found Nathanael who, upon meeting Jesus was amazed at his supernatural insight, blurting "You are the Son of God; you are the King of Israel" (John 1:49). Thus, within a couple of days, Jesus had a small group of followers who joined him at the wedding in Cana.

Over time, the number of disciples grew and Jesus strengthened his call for commitment.

Now as Jesus was walking by the Sea of Galilee, He saw two brothers, Simon who was called Peter, and Andrew his brother, casting a net into the sea; for they were fishermen. And He said to them, "Follow Me, and I will make you fishers of men. Immediately they left their nets and followed Him. Going on from there He saw two other brothers, James the son of Zebedee, and John his brother, in the boat with Zebedee their father, mending their nets; and He called them. Immediately they left the boat and their father, and followed Him (Matthew 4:18-20).

The invitation extended to Simon Peter, Andrew, James and John provided a much more definite sense of calling. Not only were they to follow him, they were to undergo training for a new vocation — catching people instead of fish. From this point on, these disciples spent the overwhelming majority of their time with Jesus, traveling with him wherever he went.

Once Jesus discerned the hostile intent of the religious leaders, he spent a full night in prayer and selected the twelve disciples who were to be groomed for future leadership. Bruce (1971:29-30) recognized Jesus' selection of the Twelve as an important landmark, dividing his ministry into two distinct phases. He further noted that the selected disciples were to be far more than intimate traveling companions or servants to Jesus.

They were to be ... students of Christian doctrine, and occasional fellow-laborers in the work of the kingdom, and eventually Christ's chosen trained agents for propagating the faith after He Himself had left the earth. From the time of their being chosen, indeed, the twelve entered on a regular apprenticeship for the great office of apostleship, in the course of which they were to learn, in the privacy of an intimate daily fellowship with their Master, what they should be, do, believe, and teach, as His witnesses and ambassadors to the world. Henceforth the training of these men was to be a constant and prominent part of Christ's personal work (Bruce 1971:29-30).

Jesus chose the Twelve from among the larger group of followers who had accompanied him faithfully and demonstrated a high level of commitment. So important was this selection process that Jesus spent an entire night in communing with the Father on the mountain (Luke 6:12). His choices were bathed in prayer!

Coleman (1964:23) emphasized that Jesus did not select men on the basis of educational background. Indeed, Acts 4:13 tells us that the Jewish leaders recognized the apostles as "uneducated" and "untrained". In other words, they had not been through the traditional rabbinical schools. Instead, Jesus chose a group of men who represented a rather typical cross-section of Jewish society. These men were far from perfect. As Coleman (1964:23) and Webber (2008a:106) noted, the Twelve were characterized by misconceptions, ignorance, impulsive behavior, prejudice, and egotism. So why did Jesus choose these particular men over others? Webber suggested that Jesus was looking for men of character (John 1:47) with a spiritual passion (Mark 1:18-20) and strong, long-term commitment (Matthew 19:27). Perhaps Jesus chose these particular individuals because they demonstrated an authentic yearning for God and were faithful, available, submissive, and teachable. The criteria are never specified. The one factor that stands out more than anything is that Jesus spent the entire night alone in prayer; and this was the basis of his decision.

Like Ogden, Webber (2008a:107) noted distinct phases in the emergence of the Twelve. Initially, the disciples believed in Jesus as the Messiah, spending time with him as they had opportunity. However, after being called to higher level of commitment, they left their previous occupations to follow Jesus on a full-time basis as part of his core group of disciples. Finally, Jesus selected the Twelve out of the larger group to become apprentices. This selection came after enough time together for Jesus to know these disciples. Most importantly, his decision was made in consultation with the Father.

Reflecting on this, Webber (2008a:105) lamented the fact that, unlike Jesus and Paul, too many churches and organizations expend great effort and time endeavoring to train people (usually volunteers) to become the right kind of leaders instead of seeking and selecting the right kind of people to train as leaders. Both Jesus and Paul personally selected those who became part of their intimate learning community. One could not simply 'volunteer' to join the handpicked groups of Jesus and Paul.

4.7.2 Qualifications for Church Leadership

In his first known letter to Timothy, the apostle Paul commended those who aspired to leadership responsibility in the church of Jesus Christ. In New Testament times, such an undertaking carried tremendous risks.

Though the qualifications of the Twelve are subject to debate, the apostle Paul left no doubts about the qualities that should characterize elders/overseers in the early church. In letters to Timothy (1 Timothy 3:1-13) and Titus (1:5-9), Paul included clear guidelines for the selection of church leaders. Interestingly, the emphasis in these passages is not on skills, abilities, and spiritual gifts, but rather on qualities such as morals and ethics, attitudes, motives, healthy relationships, and positive habits, all of which influence reputation in and outside the church (Getz 2001:195). Indeed, most of the qualifications have to do with character and behavior, especially the ability to exercise self-control under pressure (Fernando 1985:57).

To Timothy, Paul wrote,

It is a trustworthy statement: if any man aspires to the office of overseer, it is a fine work he desires to do. An overseer, then, must be above reproach, the husband of one wife, temperate, prudent, respectable, hospitable, able to teach, not addicted to wine or pugnacious, but gentle, peaceable, free from the love of money. He must be one who manages his own household well, keeping his children under control with all dignity (but if a man does not know how to manage his own household, how will he take care of the church of God?), and not a new convert, so that he will not become conceited and fall into the condemnation incurred by the devil. And he must have a good reputation with those outside the church, so that he will not fall into reproach and the snare of the devil (1 Timothy 3:1-7).

After leaving Titus in Crete to set the church in order and appoint elders in the various churches, Paul wrote him a letter with a series of instructions. Concerned about false teachers and prophets, he included a list of characteristics to aid his co-worker in the selection and appointment of quality elders/overseers. Once again, it seems that Paul's main concern was that overseers be "above reproach". However, elders also had to be able to teach and apply God's word.

For this reason I left you in Crete, that you would set in order what remains and appoint elders in every city as I directed you, namely, if any man is above reproach, the husband of one wife, having children who believe, not accused of dissipation or rebellion. For the overseer must be above reproach as God's steward, not self-willed, not quick-tempered, not addicted to wine, not pugnacious, not fond of sordid gain, but hospitable, loving what is good, sensible, just, devout, self-controlled, holding fast the faithful word which is in accordance with the teaching, so that he will be able both to exhort in sound doctrine and to refute those who contradict (Titus 1:5-9).

These two key passages are of great interest. Clinton (2001:20) noted that they most likely follow a list idiom, with the first item on the list — "above reproach" — being expounded by subsequent items. It is also important to note that Paul used

Table 4.4: Qualifications for Overseers

Verse(s)	Qualification	Explanation
1 Tim. 3:2	above reproach	Not merely unaccusable but unaccused, free from any legal charge (Zodhiates 1993).
Titus 1:6		One who has nothing an adversary could seize upon to base a charge (Zodhiates 1993).
Titus 1:7	above reproach as God's steward	As one who acts on behalf of God and is accountable to him, there must be no grounds for accusation.
1 Tim. 3:2	the husband of one wife	A "one-woman man". Getz (2001) considered this an issue of moral purity. Walvoord and Zuck (1983:736) noted that most commentators agree that this phrase prohibits polygamy and promiscuity, while others hold that this also prohibits any who have been divorced and remarried from becoming overseers, since such represents a failure in the home.
Titus 1:6		Walvoord and Zuck (1983:762) suggested that this means an elder should have only been married once; but Clinton (2001:20) believes Paul's concern relates to loyalty and is not focused on the issues of polygamy or divorce and remarriage.
Titus 1:6	having children who believe, not accused of dissipation or rebellion	To bring order in the church, one should have order in the home. 1 Timothy 3:5 provides explanation. "If a man does not know how to manage his own household, how will he take care of the church of God?"
1 Tim. 3:4	manages his own household well, keeping his children under control with all dignity	
Titus 1:7	not self-willed	Not one who is pleased with himself while despising or disregarding others; not one who "maintains his own opinion or asserts his own rights but is reckless of the rights, feelings, and interests of others" (Zodhiates 1993).
1 Tim. 3:2	temperate	Used metaphorically, meaning sober-minded, watchful, circumspect (Zodhiates 1993). Walvoord and Zuck (1983:737) like "well-balanced". Getz (2003:97) noted that such a person is clear-thinking, focused, stable, and steadfast.
1 Tim. 3:2	prudent	Greek σώφρων - of sound mind.
Titus 1:8	sensible	

Chapter 4: Leadership Development in the New Testament

1 Tim. 3:2	respectable	Virtue not only in propriety of dress and demeanor, but of inner life, uttering and expressing itself outwardly (Zodhiates 1993).
1 Tim. 3:2 Titus 1:8	hospitable	φιλόξενος – literally “loving strangers” or “fond of guests”.
1 Tim. 3:3 Titus 1:7	not addicted to wine	The word-picture is that of an individual who always has a bottle (or wineskin) on the table and so signifies addiction (Zodhiates 1993).
1 Tim. 3:3 Titus 1:7	not pugnacious	Not a “striker”. Getz (2003:98) sees this as applying to those who quickly lash out physically or verbally in uncontrolled anger.
Titus 1:7	not quick-tempered	Not inclined to anger or allowing passions to get out of control.
Titus 1:8	self-controlled	Having power over or mastery of oneself.
1 Tim. 3:3	gentle	Forbearing, lenient, yielding, making room for others.
1 Tim. 3:3	peaceable	Not disposed to fighting, contention, or quarrels.
1 Tim. 3:3	free from the love of money	Greek ἀφιλάργυρος — not fond of money, not covetous.
Titus 1:7	not fond of sordid gain	Not a person who is so eager to gain that he will degrade his moral character (Zodhiates 1993).
Titus 1:8	loving what is good	A lover of (all that is) good, speaking of men or things (Philippians 4:8, 9)
Titus 1:8	devout	Holy, righteous, unpolluted with wickedness, right as conformed to God and his laws (Zodhiates 1993).
1 Tim. 3:6	not a new convert	An overseer must not be a ‘neophyte’ (from Greek νεόφυτος – new plant) lest the rapid advancement in leadership result in pride and the same type of judgment the devil experienced (Walvoord and Zuck 1983:737).
1 Tim. 3:2	able to teach	To qualify as an overseer, a person must be able to handle God’s word accurately and convey it to others.

Titus 1:9	holding fast the faithful word which is in accordance with the teaching, so that he will be able both to exhort in sound doctrine and to refute those who contradict	As Walvoord and Zuck (1983:762-763) noted, overseers must not only meet moral standards, they must also be able to apply God's word effectively. They must hold fast the word "as it has been taught" (emphasized in the Greek text), exhort/encourage others by teaching the true word, and refute those who speak against it. 'Exhort' is from παρακαλέω and means to call upon someone to do something, to exhort or admonish. 'Refute' is from ἐλέγχω, meaning to expose, convict, reprove. Zodhiates (1993) adds "to prove one in the wrong and thus to shame him".
1 Tim. 3:7	good reputation with those outside the church	An important asset, since leaders are to represent Jesus in the church and broader community.

the terms 'elder' (πρεσβύτερος) and 'overseer' (ἐπίσκοπος) interchangeably in these passages.

As Getz (2001:195) observed, Paul made it very clear to both Timothy and Titus that only people who demonstrated maturity and Christ-like character were to be appointed to church leadership. In addition, elders/overseers had to be spiritually mature and gifted enough to teach God's word and to refute false teachers. Getz (2001:196) noted that Paul had good reason to place priority on character. As was happening in Ephesus and Crete, gifted people who lack strength of character can lead people astray and use their influence for selfish gain.

The very nature of Paul's two lists indicate the importance of spiritual formation and character development in ministry leadership. To produce quality leaders, leader development initiatives must give prayerful consideration to the development of processes that facilitate true biblical transformation.

4.8 Considerations for Church-based Training

By design, the local church has a God-given capacity and responsibility to engage in whole-life leadership development (Forman, Jones, and Miller 2004:25). To be effective, however, the church must understand what kind of leaders it is called to develop. Forman et al. (2004:62-63) highlighted several key result areas. Emerging leaders need to become wise leaders with a sound

understanding of scripture and the world around them. In addition, they must be Christ-like in character and compassion, and skilled in ministry and mission. Because of its unique nature, the church provides the ideal environment to help emerging leaders develop the godly character, strong theological worldview, and ministry skills necessary for effective leadership in the body of Christ.

4.8.1 Four Types of Training

Malphurs and Mancini (2004:152-156) indicated that four types of training normally feature in leadership development: content-driven, experience-driven, mentor-driven, and learner-driven. All of these were evident in the developmental strategies of both Jesus and Paul.

Content-driven training focuses on the transfer of knowledge. Though knowledge is most certainly important, a failure to integrate knowledge into a person's system of root beliefs and values makes it non-transformational.

According to Kouzes and Pozner (1987:285), experience provides the best opportunity for learning at leadership level. As might be expected, 'hands-on' experience was characteristic of the training style of Jesus. Practical in nature, experience-driven learning tends to enhance the integration of knowledge and skills. Moreover, because on-the-job training takes place in an authentic context, reinforcement, feedback, and social factors enhance the learning process.

Mentor-driven training occurs when emerging leaders work closely and intentionally with a mentor or coach. This process normally involves instruction, modeling, observation, and evaluation. As discussed previously, both Jesus and Paul applied similar approaches with great effect.

In learner-driven training, the emerging leader takes responsibility for his or her own growth. This type of self-directed training is characteristic of highly motivated emerging leaders who, because of a challenge, experience, or influential model, seek to grow in character, knowledge, skills, and emotional maturity. The apostle Paul himself undertook self-directed learning when he slipped away to Arabia for an extended period to meet with the Lord (Galatians 1:17).

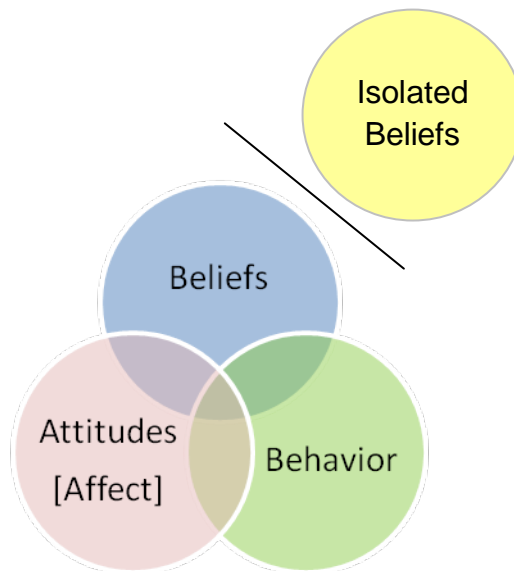
4.8.2 Perspectives from Christian Education

Richards (1975:60-117) identified five important aspects of Christian education that can be applied to church-based leadership training: a whole-person focus, a discipling purpose, a method that flows from modeling, an interpersonal dimension, and an “overflowing outcome”.

An effective approach to Christian leadership development requires a balanced, whole-person focus that addresses beliefs, behavior, and attitudes (affect) (Richards 1975:61-63). Neglect of any one of these aspects can hinder the effect of transformation in people’s lives. An approach to teaching and training that is not holistic often results in the isolation of ‘taught beliefs’ from ‘operating beliefs’, resulting in attitudes and behavior inconsistent with a biblical worldview (see Figure 4.2). Richards (1975:66) asserted that, if we desire to impact the whole person, the context in which teaching and learning occur must be authentic. Real life situations produce the greatest opportunities for change.

Figure 4.2: The Danger of Isolated Beliefs

(adapted from Richards 1975:63)



The church of Jesus Christ is also entrusted with a discipling purpose (Richards 1975:70). God is at work shaping people into the image of Christ (Romans 8:29, 2 Corinthians 3:18); and discipleship is to help facilitate this process. Many churches ‘teach the Bible’, believing that this constitutes effective discipleship.

However, this overly cognitive, non-integrated approach often leads to 'isolated beliefs' (Figure 4.2) and, consequently, a lack of transformation.

Effective discipleship moves past the single-factor theory of determinism (behaviorism), the two-factor theory of transactionalism, and three-factor transactional/structural (social-cognitive) theory to a four-factor theory rooted in a biblical worldview (Richards 1975:72-76). As Richards (1975:72-76) noted, four-factor theory acknowledges that:

- humans are active beings who interact with their environment in a transactional manner and attempt to integrate data in such a way that it makes sense and provides guidance for future interaction.
- humans are structured in a way that limits how environmental data is perceived and processed.
- the world around us is structured and can only be manipulated to a certain extent (limiting the number of viable worldviews).
- the full essence of 'reality' is actually revealed by God.

This perspective affirms that there is an absolute standard by which constructs of reality can be judged. "Only by committing ourselves to God's revelation and through keeping His words will we experience Truth, and ... find the freedom to be who we are" (Richards 1975:75).

Effective discipleship obviously involves engagement with truth; but truth experienced and socially reinforced is of far greater affect. Jesus discipled in a real world environment and in the context of a community. Jesus also lived what he taught. His real life example linked what he taught to how it must be lived. But the key to Jesus' effectiveness lies not in modeling from a distance, but from his purposeful proximity (Chole 2001)!

As Richards (1975:84-85) noted, modeling and instruction prove most effective when there is frequent, long-term, relationally meaningful contact with the model in a variety of settings that expose the model's inner state and demonstrate consistency between values and behavior. When these conditions exist, the

model's conceptual explanations and lifestyle instructions become realities to be experienced rather than mere concepts to be believed.

All of these factors create important learning dynamics usually missing in an artificial classroom environment. True transformational learning, learning that makes us more like Jesus Christ, requires going beyond humanistic learning strategies. Certainly, cognitive, social, and experiential elements all feature in the learning process, but effective discipleship (and the transformation it brings) is ultimately a supernatural process, led and empowered by God's Holy Spirit.

4.8.3 A Final Overview of Jesus' Strategy

In his classic book *The Master Plan of Evangelism* (1964), Robert Coleman outlined the various principles and practices used by Jesus to develop a team to take the gospel to the world. Significantly, Jesus ordered his entire time on earth in accordance with the purposes of the Father. In obedience to the Father, he selected and developed a group of men who would "bear witness to his life and carry on his work after he returned to the Father" (Coleman 1964:21).

The selection process used by Jesus provides important insights. From among those who were already following him, the Lord selected men who were willing to follow and willing to learn, men who were looking for the coming of God's kingdom. His chosen disciples represented a cross-section of Jewish society. It is important to note that Jesus did not make choices on the basis of status, wealth, education, or competence. Jesus' leadership selection choices were made in consultation with the Father. His decisions were bathed in prayer. As the prophet Samuel learned, we can easily be fooled by appearance and apparent competency; but God looks on the heart (1 Samuel 16:7). God himself must be consulted in all such decision-making processes.

As the earthly ministry of Jesus progressed, he focused more and more on the development of his handpicked team. His concentration on the Twelve illustrates an important training principle. To lead the many, you must invest in the few. The smaller and more concentrated the group, the greater the opportunity for effective instruction (Coleman 1964:26-27). For those inclined to question this strategy,

Coleman(1964:31) was quick to point out that Jesus was not trying to please crowds, but to usher in a kingdom. To spread the good news and launch the church after his impending crucifixion and resurrection, it was essential to spend quality time investing in the development of those who would lead this future movement.

Jesus followed a logical but divinely directed process to develop his disciples into leaders. From the beginning, he purposed to train them for ministry. An essential part of his strategy, Jesus prayerfully selected his team of disciples to be *with him*. Because they were constantly together, Jesus was able to build intimate relationship with his team and to model what they were to become and do. He engaged the disciples in an effective long-term relational learning process, imparting his ethos, teaching them what the Father gave him, maturing their character, and developing their ministry skills, all in an authentic, missional context. As they grew, Jesus entrusted them with greater responsibility, eventually sending them out in teams of two to minister in his name. Maximizing the learning experience, he listened to their reports, providing them with affirming feedback and correction. After his death and resurrection, and before his ascension, Jesus commissioned those he had trained to carry on with the mission, representing him, proclaiming the gospel, and making disciples. With the coming of the Holy Spirit in power, these early church leaders began to implement Jesus' strategy. So powerful was their impact that they became known as those who unsettled the world (Acts 17:6).

4.9 Conclusion

As Forman et al. (2004:44-45) noted, both the Lord Jesus and the apostle Paul practiced a simple and straightforward approach to leadership development — quality investment in a few handpicked emerging leaders who, in turn, continued the process by investing in others. Using a very basic mentoring/apprenticeship approach, Jesus and Paul were successful in raising up reproducing leaders — building character, teaching sound doctrine, and developing competence — all in the context of active ministry while in pursuit of a God-given mission. In this they were not alone; for the Holy Spirit worked in them, through them, and with them

to enable them to accomplish the Father's purposes. The instructions of Jesus in his post-resurrection appearances make it clear that Jesus intended this model of training and development to be replicated. The Master said, "Follow me!" If local churches are to raise up quality leaders, and if the church in Africa is ever to address its ongoing leadership deficit, then we must look, listen, learn, and obey.

Chapter Five

Models, Strategies, and Insights

5.1 Overview

In an effort to identify helpful practices that can be applied to the design of transformational leadership development processes in the South African church, previous chapters examined instructional design theory, adult learning theory, and leadership development in the New Testament. Shifting the focus, this chapter considers various leadership development models, strategies, and insights, all with a view toward informing the design of church-based leadership development initiatives. Section 5.2 briefly examines the problems associated with the traditional schooling model and perspectives on leadership development offered by Dr. J. Robert Clinton, the Be-Know-Do model of the U.S. Army, and church-based training advocate Jeff Reed. Section 5.3 gives an overview of church-based leadership training strategies developed by three international organizations: BILD International, the Centers of Church-based Training, and LeaderSource Strategic Global Alliance. Each organization is unique in its approach to church-based training and level of intervention. Moving to the South African context, section 5.4 examines models of leadership development developed by two growing cell-based churches, Little Falls Christian Centre in Roodepoort and Maranatha Community Church in Kempton Park, both of which have been successful in facilitating leader emergence through an intentional and well-developed growth path. Though relatively few churches in South Africa have given thought to the intentional development of leaders, these two churches are

most certainly exceptions. Finally, section 5.5 considers select evidence-based models, principles, and practices in organizational leadership development that could prove helpful in the design of church-based leadership training. This section includes contributions from Regent University's Center for Creative Leadership, Jay Conger (senior research scientist at the Center for Effective Organizations at the University of Southern California), and others.

5.2 Perspectives on the Formation of Church Leaders

The last three centuries witnessed the rise of the scholastic paradigm for clergy formation, exacerbating an already evident shift in Christian leadership development away from the local church and ministry context, away from life-on-life discipleship, and away from a holistic focus toward a compartmentalized formal education essentially devoid of authentic context and developmental balance (West 2003:116). Though strong on cognitive development, the traditional scholastic model tends to fall short in affective and experiential development. Leaders and churches alike have been frustrated by the weaknesses associated with this model.

With the relatively recent increase in nondenominational churches and churches using leader-intensive small group ministry models, church-based leadership training has begun to emerge as a viable alternative to formal schooling. As one of the pioneers of the church-based training movement, Jeff Reed (1992) was instrumental in laying down many of the foundational principles upon which this paradigm is built.

5.2.1 *The Scholastic Model*

Though initially a Western phenomenon, the scholastic paradigm spread into the two-thirds world (including Africa) with the modern mission movement and rapid expansion of Christianity. In spite of a certain amount of dissatisfaction with the results of formal theological education, and though Spirit-driven winds of change are blowing around the world, the traditional scholastic model involving seminary or Bible school remains the dominant paradigm for ministerial formation among

Protestant churches in most of Africa (Mwangi and DeKlerk 2011:1). Yet, as West (2000:133) conceded, leadership formation is somewhat compromised when based primarily upon cognitive theological processes devoid of community and missional contexts.

Al Mohler, president of Southern Baptist Theological Seminary, recently served on a Gospel Coalition panel facilitating discussion on the training and development of the next generation of pastors and Christian leaders. According to Mohler (2011),

Generation after generation of the Christian church has had to develop the ways it trains pastors. The seminary in the American experience grew out of the effort to emulate other forms of professional education. And in one sense, that's the downfall of the entire experiment. You had debates going back to the nineteenth century as to whether the ministry is a profession and should we have professional schools alongside the others. What you have with the emergence of the modern seminary is a school that is intended to train pastors for the church alongside the medical school, dental school..., and all the rest. That works educationally, but it doesn't work for the church.

Mohler (2011) argued that an emerging leader who has the opportunity to learn and serve in ministry alongside an established pastor has a great advantage over one who seeks to be equipped for ministry through seminary. While acknowledging that seminaries are adept at the transfer of cognitive information, he noted that the dynamics which exist when pastors train pastors in the local church are far more important and fundamental. "The local church needs to train what only the local church can do. Pastors are the most effective trainers and educators of pastors" (Mohler 2011). Recognizing that more and more churches are taking responsibility to raise up their own leaders, he suggested that seminaries must redefine their role. Instead of seeking to train leaders, they must be willing to embrace a serving role, assisting churches to train their leaders.

In Africa, the drawbacks of the scholastic model extend far beyond its detachment from context and ministry. By its very nature, this model is plagued

by its exclusiveness. Few are the emerging or existing church leaders who can afford to invest so much time and money in programs that require them to withdraw from ministry or employment for extended periods for studies that may not directly benefit their church or ministry. Factors such as cost, time, disruption of life and ministry, residency and/or class requirements, and a generally theoretical focus motivate one to question the expediency of this model as a primary approach to ministerial formation in the African context.

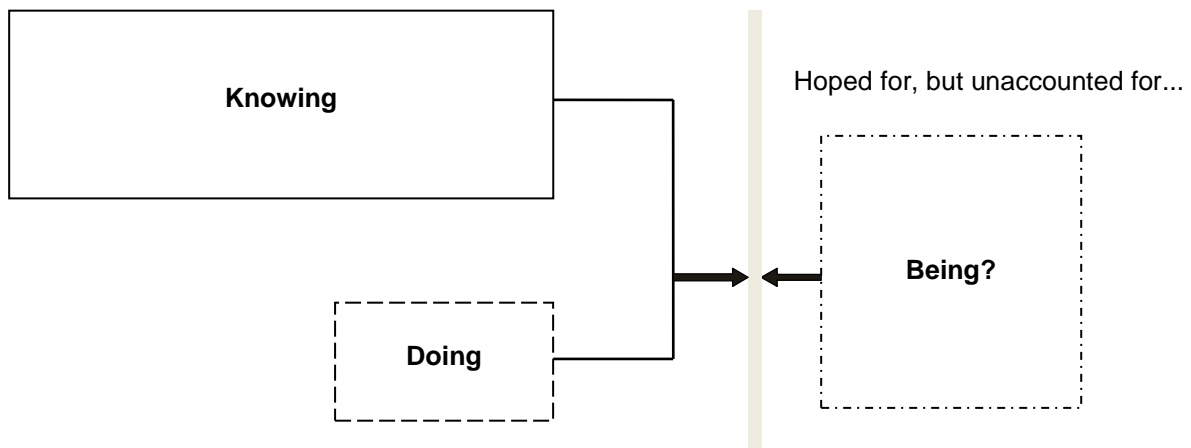
As a product of the modern Western professional educational paradigm, the scholastic model seems inextricably linked to academic images and concepts such as classrooms, professors, textbooks, theories, exams, grades, fees, and accreditation (Reed 2001:2-3), little of which has anything to do with leadership development processes as portrayed in scripture. While there is most certainly value in cognitive learning, and while seminaries and Bible colleges play a vital role in research and theology, the general lack of emphasis on the affective and experiential realms in the scholastic model can result in imbalanced and impractical learning, with 'knowing' emphasized over 'doing' and 'being'. As a result of this imbalance, emerging leaders often return to sending churches, *if* they return, full of head knowledge, yet lacking the spiritual maturity, wisdom, skills, experience, and credibility necessary to lead or minister effectively.

The relatively recent upsurge in distance learning programs in South Africa helps to address some of these concerns. Emerging leaders have access to academic theological learning without having to leave their current ministry context and community. However, unless the curriculum deliberately links learning to the emerging leader's sense of calling, the local community of faith, the ministry context, mature leaders who can mentor emerging leaders, and experiences that enhance the development of character and skills, the learning experience may lack relevance, balance, and transformational power. Nonetheless, with internet access readily available in urban and areas, distance learning options can easily be built in to a blended learning process for local church leaders. A more innovative solution, the Antioch School (see section 5.2.1) has designed and implemented a church-based leadership development model in which an accredited theological program has been fully integrated with local church

leadership development processes in order to provide balanced and transformational learning for emerging leaders in the context of their local church and community. This model represents a possible way forward in the South African context.

Figure 5.1: The Traditional Scholastic Model

(adapted from Holland 1978:99, Mwangi and DeKlerk 2011:2)



5.2.2 Clinton's Developmental Approach

Rather than utilizing a traditional schooling model based on the transmission of information, the 'banking model' as Freire (1972) called it, Clinton (1984:14) suggested the need to adopt a more balanced developmental approach to growing leaders. Sadly, because of its overtly academic emphasis, the traditional schooling model is often less than effective in facilitating spiritual formation. Yet, as Clinton (1988:13) stated, "Effective ministry flows out of being, and God is concerned with our being". In Clinton's developmental model, learning is about growth of the whole person rather than the mere acquisition of knowledge, with the ultimate objective being maximum development in Christ. "Wholistic" in nature, the developmental model recognizes the dynamic tension that exists among the cognitive, affective, and skill-related learning domains and emphasizes the importance of balanced development in the three realms of 'being', 'knowing', and 'doing' (Clinton 1984:14).

Unlike the traditional schooling model, which tends to be bound to the classroom, learning in the developmental model is tied to real life experience (Clinton 1984:14). Quite versatile in nature, the developmental model can include

elements of formal, non-formal, and informal learning. However, instead of depending primarily upon 'expert lecturers', developmental learning models are better served by facilitators of learning, who also see themselves as learners.⁴⁶

The development model contrasts sharply with the traditional schooling model. Instead of relying excessively upon classroom-based lectures, a variety of learning methods characterize the developmental approach (Clinton 1984:14). Modeling, mentoring, apprenticing, work assignments, experience, guided devotions, lectures, articles, active learning, discussion, group work, and reflection all contribute to the process. Rather than passively receiving information, emerging leaders are active participants in the learning process. In contrast to the schooling model, emphasis is placed on the learner and learning, rather than on the teacher and content. As in biblical models of leadership development, relationship and community play a central role in the learning process. For the developmental model to be effective, balance must be struck between community-based and individualized development (Clinton 1984:88). As Clinton (1984:86) emphasized, the developmental model is concerned with that which best develops the emerging leader. Inevitably, a well-developed learning process will include whatever is most appropriate for the learner(s) in the specific context.

Clinton (1984:41) adapted Holland's (1978:8) 'two-track' analogy to aid in planning and evaluating multifaceted leadership development processes (see Figure 5.2). Using the analogy of railroad tracks, this model features four key elements of the learning process — the parallel processes of input and in-ministry experience superimposed over alternating processes of dynamic reflection and spiritual formation — all of which contribute toward 'wholistic' growth in 'being', 'knowing', and 'doing'.

Recognizing the integrated nature of content, values, and skills, 'input' includes cognitive, affective, and experiential elements. 'In-ministry experience' refers to

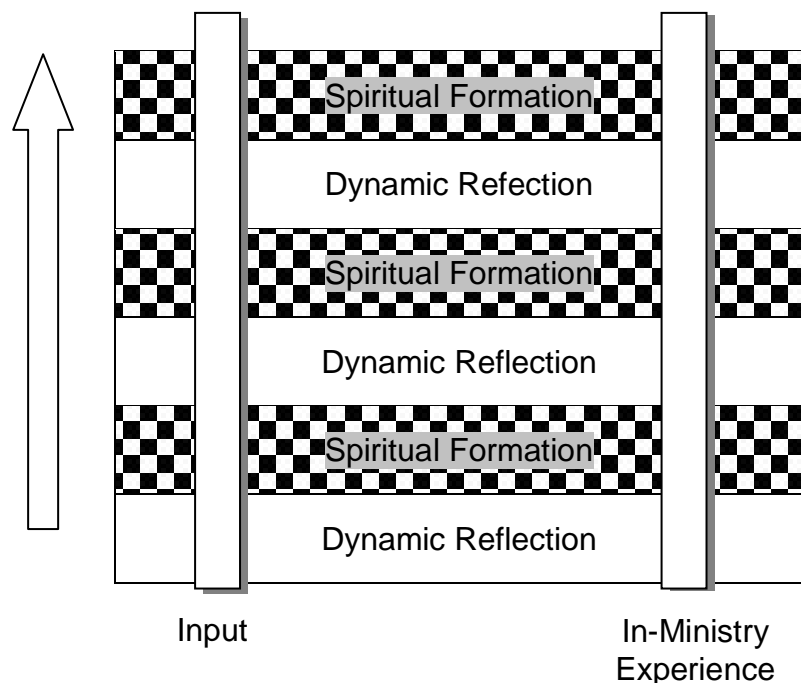
⁴⁶ Interestingly, Jane Vella

any contextual experience or application of input that contributes to the development of leadership skills, spiritual gifts, or any other type of learning.

A two-fold interactive thinking process, ‘dynamic reflection’ helps “to correlate input ideas relevantly to experience and spiritual formation” and assists the emerging leader to “draw out from experience ideas which influence input and spiritual formation” (Clinton 1984:48). Through dynamic reflection, the learner discovers relationships between concepts received through input and life experience, enhancing spiritual formation and impacting future life experience. On the other hand, it also stimulates discovery of learning from life experience, giving perspective on input (Clinton 1984:48). Clinton regards dynamic reflection as a key integrating factor in the learning process.

Figure 5.2: Clinton’s Adapted Version of Holland’s Two Track Analogy

(Clinton 1984:41)



The intended outcome of input, in-ministry experience, and dynamic reflection is ‘spiritual formation’, which Clinton (1984:41-42) defines as the development a person experiences as he or she grows in relationship with God, increasingly demonstrates godly character in daily life and relationships, and experiences more of God’s presence and power in productive ministry. In short, spiritual formation is being conformed to the image of Christ (Romans 8:29).

5.2.3 The Be-Know-Do Model

Clinton's developmental model shares much in common with the 'Be, Know, Do' model of the U.S. Army. The Army defined leadership as "influencing people by providing purpose, direction, and motivation while operating to accomplish the mission and improving the organization" (FM 22-100 1999:1-4). As Webber (2008c) noted, the Army recognized that leaders influence others through their character, competence, and actions. Hence, effective leader development must focus on character and values (being), competencies and capacities (knowing), and decisions and actions (doing) (Webber 2008c, Campbell and Dardis 2004:26). As such, "leader development becomes synonymous with 'whole person' development" (Campbell and Dardis 2004:26); or, as the Army put it, "Becoming a leader involves developing all aspects of yourself" (FM 22-100 1999: 1-6).

Webber (2008c) agreed that the Be-Know-Do model has specific advantages over the poorly conceptualized and designed leader development processes so often characteristic of local churches. Significantly, this model describes a "clear, systematic goal" for leader development, making it possible to design specific learning processes and to evaluate learning progress. Moreover, this developmental goal is holistic in nature, emphasizing the development of the whole person, with a strong emphasis on character. Beyond this, the model includes many of the processes by which emerging leaders are built: modeling, mentoring, hands-on experiences, job assignments, systematic feedback and evaluation, and self-reflection with evaluation. Significantly, various levels of leadership are acknowledged, with the specific needs of each informing the design of their respective developmental processes.

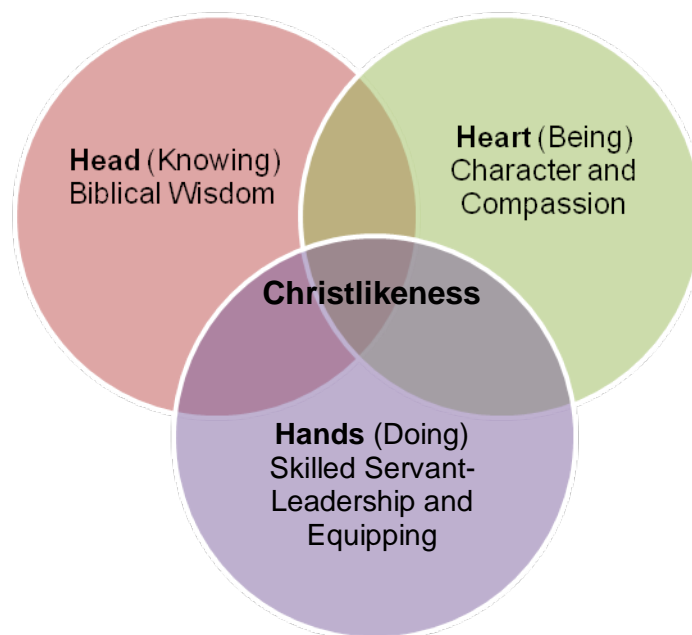
While the Be-Know-Do model is superior to the academic approach of the scholastic model, it has shortcomings when applied to Christian leadership development (Webber 2008c). Christ and his purposes are at the center of the Christian leader's being; and this influences every aspect of life. Moreover, the Christian leader develops and leads in community. In contrast, and rather surprisingly, the U.S. Army's model is rooted in a worldview that esteems self-sufficiency and individualism (Webber 2008c). As improbable as it may seem,

the concept of community and formation in community are not central in the Be-Know-Do model. Webber (2008c) also believes the model to be weak in developing original thinkers and visionary leaders.

In spite of the weaknesses of the Army model, the concepts of 'being', 'knowing', and 'doing' do represent the three learning domains and encapsulate the idea of balanced, holistic development. To be effective, church-based training approaches must recognize the importance of holistic development and build in processes that promote learning in all three domains.

Figure 5.3: The CCBT Head, Heart, Hands Model

(adapted from Forman et al. 2004:63)



Another example of a be-know-do model, the Centers of Church-based Training use a head (knowing), heart (being), and hands (doing) analogy to describe a holistic developmental process that produces “wise leaders who are sound in their knowledge of God’s Word and his world, strong in character and compassion, and skillful in ministry and mission” (Forman et al. 2004:62-64). The ultimate goal of this multi-domain process is a “Christlike servant-leader” (Forman et al. 2004:62). The CCBT model is examined in greater detail in section 5.3.2.

5.2.4 Reed's Perspectives on Ministry Formation

Known for his *Paradigm Papers* (1992-1997), BILD International founder Jeff Reed is a pioneer in the church-based training movement. Having recognized the shortcomings of the traditional scholastic model of ministry formation, Reed proposed a radical shift in the center of Christian leadership development from the seminary/Bible college back to the local church, and a shift in the role of seminaries and Bible colleges from centers of training to resource centers for the church. Patterned on the “way of Christ and the apostles”, Reed (2001) proposed a church-based training model characterized by the following.

- context-based training
- development in community
- mastery of the Scriptures
- balanced development of character, practical wisdom, and ministry skills
- mentoring to encourage and assess progress
- growth through assigned responsibilities
- competency-based assessment

Ultimately missional in nature, Reed's (2001:9) church-based model has as its objective not the development of ministry professionals, but “the planting, establishing, and multiplying of churches”.

As Reed (2001:11) pointed out, changing from an “institutionally driven, formal educational paradigm to an ecclesologically driven, non-formal paradigm” has far-reaching implications. To achieve the required levels of competence, churches would need to develop serious ordered learning processes and programs for their emerging leaders (Reed 2001:12). (This is one area in which seminary support would be extremely helpful). As one might expect, the educational methodology would need to be transitioned from transmission of information to real life, problem-posing. Generally, teaching would no longer be done by university professors. Instead, learning would be facilitated by “gifted and biblically qualified church leaders who are in the process of planting, establishing, and multiplying churches”, who serve in the context of the community life of the local church (Reed 2001:11). Changes in curricula would also be necessary. The

agenda would be informed by the “natural categories of Scripture and the cultural context of the church” (Reed 2001:11). Preparedness for ministry would no longer be based on academic criteria. Instead of a grading system, some sort of holistic portfolio system would be utilized to assess character development, ministry competence, and practical wisdom. In addition, the process of recognition and approval would move away from a focus on the granting of degrees. Instead, once an emerging leader is judged to possess the character and competencies required for ministry, recognition would come through the laying on of hands by local church leaders.

Though an attractive concept, the challenges associated with such a shift in thinking and practice could be substantial. Nonetheless, what was once merely a ‘vision’ for a return to ministerial formation in the local church has now become a reality in certain contexts. Reed’s organization, BILD International, and a number of other organizations and churches have successfully developed models of church-based leadership development that exemplify the criteria above. Several of these innovative models are examined in the following section.

5.3 International Models of Church-based Leadership Development

This section examines the strategies and models of three prominent international ministries committed to church-based training: BILD International (and the Antioch School), the Centers of Church-Based Training, and LeaderSource Strategic Global Alliance. Though all three are church-based in their approach, they vary significantly in strategy. The analysis of each model is descriptive; and no attempt is made at evaluation.

5.3.1 *BILD International/Antioch School*

Founded by Jeff Reed in 1986, BILD International is a pioneer and leader in church-based theological education. Birthed out of a 1970s equipping course at a local church in the USA, BILD has grown into an international ministry providing

church-based equipping strategies and resources for all stages of development from discipleship and leadership development right through to the doctoral level.

At present, BILD International works formally with church networks and associations in about thirty countries, assisting them to develop church-based theological education paths and resources to address their church leadership and church planting needs. BILD's mission is "to train networks of leaders, grassroots to national, in the way of Christ and His Apostles, in partnership with CPMs (church planting movements) in each of the nine major civilizations" (BILD 2012a). Having expanded beyond its original focus on theological training, the vision of BILD is

to see well established church-planting movements in each of the nine major civilizations, led by leaders, fully trained in 'the way of Christ and His Apostles', who are designing and implementing effective strategies for civilization-wide progress of the gospel (BILD 2012a).

With its emphasis on training, BILD's 2011 brochure 'Disciple to Doctor' defines the vision as "to catalyze a seismic shift from formal theological education to church-based leadership development worldwide" and the mission as "to partner with church planting movements around the globe, to train disciples and leaders using methods established in the New Testament."

5.3.1.1 BILD's Approach

The expression, "the way of Christ and the Apostles"⁴⁷, is central to BILD's vision, mission, and goals. BILD strongly believes that the way in which Jesus taught his disciples and Paul trained his 'spiritual sons' is still the preferred method of developing leaders today (BILD 2011:5).

BILD's ministry philosophy is built on two main principles (BILD 2012a).

⁴⁷ According to Reed (2001:8), the expression 'the way of Christ and the Apostles' is borrowed from twentieth century missionary and writer Roland Allen, who coined this phrase while contesting Western missionary models used in India.

- (1) “The Church is at the center of God’s redemptive work during this age, and God has revealed an administration for the Church (Ephesians 2:11–3:12).”
- (2) “Every aspect of Christian ministry (evangelism, discipleship, missions, theological education, theology, etc.) needs to find its identity and purpose in building up the Church” and must “align itself with the revealed administration”.

BILD (2010:4-8) has extrapolated these foundational principles into a global ministry philosophy called “the way of Christ and his apostles”. This paradigm involves four perspectives: Paul’s ministry cycle, Paul’s letters as establishing tools, the Didache (the teaching of Christ as delivered to the apostles), and the Paul and Timothy model. In Acts 13:1–14:28, Paul’s strategy was to evangelize key urban centers, establish local churches, and entrust these churches to the oversight of ‘faithful men’ (2 Timothy 2:2). Once his purpose in a community was accomplished, Paul would move on to another location, leaving the church to spread the gospel in the surrounding region. Paul often followed up by sending representatives and, on occasion, letters to strengthen the churches or to address problems. The shifting focus from Paul’s early to late letters influenced BILD’s philosophy (BILD 2010:5). Initially, Paul was concerned with the clarification and defense of the gospel. Later letters, such as Ephesians and Colossians, focused more on God’s plan and purpose for the Church. Finally, Paul’s pastoral letters emphasized the development of strong leaders and families within the local church. In particular, the Didache’s focus on establishing believers and families in Christ and Paul’s long-term investment in Timothy influenced the development of BILD’s philosophy (BILD 2010:6).

BILD’s ministry philosophy is summed up in the following statements (BILD 2011:5).

- “The center of God’s purpose for this age resides in the Church” (Ephesians 3:2-11).
- “Building God’s Church and his Kingdom became Christ’s purpose; and multiplication of churches continues as his strategy” (Matthew 16:13-19).

- “The apostles delivered the truth, and the world should see evidence of this truth in all churches” (2 Timothy 1:13-14; Jude 3).
- “The perpetual command to take the gospel to the world continues undiminished” (Matthew 28:19-20; Luke 24:44-49; Acts 1:8; 1 Timothy 3:14-15).
- “Character, skills and academics taught in apprenticeship-type training yield the deepest, longest-lasting impact” (Titus 1:5-9; 1 Timothy 1:18-19).
- “Urban centers act as the key to evangelizing the world (as seen throughout the New Testament).”
- “The church-planting method modeled by the apostle Paul remains valid today” (Acts 13:1–14:28).

BILD’s (2011:6) leadership training development approach is rooted in three key concepts.

- (1) BILD’s process is non-formal, combining the informal, in-service, in depth manner in which Jesus trained the Twelve with the best of contemporary western schooling.
- (2) BILD programs are church-based, taught in churches for churches by church leaders.
- (3) Basing assessments on the development of practical ministry skills, godly character, and deep biblical understanding, BILD’s training is competency-based.

BILD is involved in a number of initiatives and operates at several levels. At present, their primary initiatives involve international church planting partnerships. BILD’s long-term goal is to facilitate the training of 10,000,000 leaders worldwide in “the way of Christ and His Apostles” through partnerships with church planting movements in the nine major civilizations, with a special focus on India, China, and Southeast Asia. As part of this initiative, BILD is working toward the establishment of integrated systems for training leaders from grassroots to national level in church-based, non-formal programs around the world (BILD 2012a).

5.3.1.2 The Antioch School of Church Planting and Leadership Development

BILD's North American initiative is directly linked to their innovative Antioch School of Church Planting and Leadership Development, "a church-based, competency-based school for assisting church leaders in training future leaders in the context of their churches" (BILD 2010:3).

According to Stephen Kemp (2012), the academic dean of the Antioch School,

The Antioch School is "a school without the schooling paradigm...." Antioch comes first in our name because the endeavor is firmly rooted in the Antioch tradition of church-based theological education and the spontaneous expansion of the gospel.... The central context of student development in Antioch School programs is the work of the Holy Spirit in local churches, church networks, and church-planting movements. Learning occurs in-service and in the context of genuine communities of faith with wise leaders. The quality of degrees is assured by rigorous competency assessment. We recognize academic credentials for what they are but not as a replacement for church credentials....

The mission of the Antioch School is "to support church-based theological education by providing academic degree programs utilizing in-service leadership development for ministry in church-based contexts" (Antioch School 2012).

Antioch's vision is

to support the tremendous spontaneous expansion of the Church in the twenty-first century through theological education done in the context of church ministry, which maintains high levels of achievement in character, skills, and knowledge (Antioch School 2012).

Accredited by the Distance Education and Training Council in the USA, the Antioch School offers church-based programs ranging from certificate to doctoral level in ministry and theology. Each of these is grounded in BILD's philosophy of church-based education.

All Antioch School programs share common objectives (Antioch School 2012):

- “Comprehensive development in character, skills, and knowledge for effective ministry.”
- “Life development and lifelong learning orientation.”
- “Recognition of and participation in the centrality of the local church in the plan of God.”
- “Ability to master biblical content, benefit from significant contributions of scholars, and build strategic models of ministry accordingly.”

What makes Antioch’s approach unique is that training and development occur in the context of the local church under the supervision of local church leaders; but the course resources and assessment tools, as well as the certification of trainers, are provided by Antioch. This relieves local churches of the burden of developing curricula and designing learning processes. Since learning takes place within the context of the local church and community, local church leaders drive and oversee the program, guiding the development of emerging leaders in a way that supports the vision and values of the local church. The combination of a well-designed curriculum with the intimate involvement of church leaders in the process significantly enhances the effectiveness of developmental process.

According to Kemp (2012), the Antioch School process for church-based leadership development is unique in both its curricular and contextual designs. Programs are integrated in terms of character development, ministry skills, and knowledge. A strong emphasis is placed on character and spiritual formation. Most programs start with an entire term focusing on solely on life and ministry development. Antioch’s programs are also integrated into a comprehensive training system, providing an academic version of BILD’s upper level training programs for leaders at all levels (grassroots to national). Built into the learning process is the development of others. No one is just a ‘student’; all are involved in the training of other less experienced leaders.

Kemp (2012) noted that the contextual design of the Antioch School differs from other accredited distance learning options. The Antioch School does not purport to train church leaders. Rather, it provides resources for church leaders to train others and to be trained. In addition, the Antioch School is not organized around typical ‘academic units’. Instead, all training is intentionally integrated into the

normal relational, contextual church structures and programs, as part of the ongoing life and ministry of the church. The training focuses on emerging leaders growing and operating in the normal context of community life. The Antioch School seeks to come alongside churches and church networks, to further their missional purposes, and to operate under the authority of their leaders.

Antioch's approach to assessment is also unusual. Relying on a number of tools supplied to churches, the school validates the comprehensive competency assessments undertaken by the leaders supervising those in training. Assessments consider character development, understanding of and obedience to biblical teaching, ministry giftedness, team involvement, ministry assignments, and feedback from mentors and supervisors (Antioch School 2012). A well-designed portfolio assessment system serves the dual purposes of keeping the developmental assessment in the context of the local church while enabling academic quality control by the Antioch School. The quality of the training processes and sophistication of the portfolio system earned accreditation for the Antioch School (Kemp 2012).

While the overall cost of this program could be prohibitive for many churches in South Africa, the design merits attention. Collaborating with the local church, Antioch provides high quality, theologically sound, practical learning resources, a clearly defined developmental pathway in line with local church values and vision, certification and training for the church leaders who oversee the process, and the tools required to assess competencies. Local churches benefit in that they are provided with a well-conceived and academically recognized developmental process, church leaders oversee and guide the process, and emerging leaders remain in the church and develop in a community and ministry context.

5.3.1.3 The BILD Learning Process

BILD (2010:8) uses the term 'curriculum' to refer to its entire learning process, described by the organization as "a unique learning system based on the way of Christ and His Apostles". BILD's approach focuses on contextual learning (in-ministry training including modeling and mentoring), relevant content (biblical mastery, character development, and ministry skills), and meaningful assessment

(character qualifications and essential capabilities). The learning system features three vital facets: the '5 Level' program, well-designed courses, and a portfolio system. The '5 Level' program is an ordered, non-formal, in-service training system that guides development from a basic level all the way to doctoral level and caters for all levels of leadership — grassroots to national. BILD's (2012b) courses, in particular *The Leadership Series* (25 courses) and *The First Principles Series* (13 courses), help leaders at all five levels to master the scriptures. A well-developed mentoring and portfolio system supports in-service learning and the assessment of personal and ministry development.

BILD's courses use a proprietary learning process, which involves biblical passages, theological readings, community dialogue, personal reflection, and projects (BILD 2012b). Labeled the Consistent Study Process (CSP), this process seeks to take participants through the following stages in order to facilitate engagement and learning.

- (1) Study the Scriptures — Participants read a scripture passage, answer basic questions about the passage, and summarize its core teaching.
- (2) Consult the Scholars — Participants read and reflect on scholarly commentary and key quotes relating to the passage in question, recording their insights.
- (3) Think Through the Issues — Participants reflect on issues, engage in Socratic discussions in small groups, and record final thoughts.
- (4) Apply the Principles — At this stage, participants reflect on the first three steps and design an application (or project).
- (5) Reshaping Our Lives — This is the integration stage. Participants reflect on the entire process, reconsidering assumptions, values, attitudes, and actions with a view toward developing a more accurate worldview.

BILD's system involves serious ordered learning that combines formal and informal elements (BILD 2010:8). Whether utilizing the non-formal, non-accredited process or the accredited process developed by the Antioch School, all of BILD's processes are designed to be led by church leaders in the context of the local church. In addition, BILD's courses are competency-based, focusing on

“ministry skills, character development, life in community, and biblical understanding through rigorous use of outcomes assessment” (Antioch 2010:4).

Using sequenced modules, the Antioch School’s accredited programs develop five to ten competencies per program. BILD’s learning courses are supported by notebooks that contain “Socratic discussion guides, project guides and models, personal project guidance, lifelong learning guidance, and sets of theological readings” (Antioch 2010:6). The pedagogical format seeks to ask the “right questions in the right environments with the right people using the right resources” (Antioch 2010:6). In order to provide a healthy perspective, accompanying theological readers feature articles and chapters from over three hundred authors. All modules are dialogue and project based, and done in community and in-service. Issues and projects are adapted as needed based upon cultural setting.

An intrinsic part of the development process is the Personal Development Plan (PDP), an integrative, proactive tool designed to assist emerging leaders in the development and monitoring of their lifelong learning strategies. The PDP enables learners to rise above the self-imposed life management limitations through the design of a comprehensive development plan. The PDP includes the following worksheets.

- Your Purpose — Creating a Basic World View Statement
- Your Story — Life Development Time Line
- Your Abilities — Evaluating Your Abilities and Skills
- Your Roles and Responsibilities — Framing My Identity
- Your Education, Finances, and Life Work — Envisioning the Long Term
- Your Discipline and Determinations — Life Development Strategic Life Plan
- Your Source of Wisdom — Decade Mentor System

As West (2003:141) noted, BILD’s approach essentially seeks to “re-center the local church and all its people in missional enterprise”. Indeed, interviews with churches participating in BILD’s church-based training processes indicate that the purpose and programming of the whole church gradually undergoes change, with

the development of church members becoming a central purpose in the life and ministry of the church. Nonetheless, even with many success stories, Reed acknowledged that, due to organizational culture, problems with implementation, or a lack of readiness, some churches are unable to adapt to BILD's approach (West 2003:141).

5.3.1.4 An Overview of Antioch School Courses

The Leadership Series

The Leadership Series is designed to help local church leaders, missionaries, and pastors develop leaders to strengthen and expand the church worldwide (BILD 2012b).

Series 1 is comprised of fifteen courses, four of which are considered foundational. These courses are designed to help train emerging leaders to be part of a leadership/ministry team that is single-minded in its ministry vision and philosophy. Out of this team would come long-term local church leaders and/or church planters. Series I consists of the following courses.

- Acts: Keys to the Establishment and Expansion of the First Century Church
- Pauline Epistles: Strategies for Establishing Churches
- Understanding the Essentials of Sound Doctrine
- Leaders and the Early Church
- Preaching, Teaching, and Worship in the Early Church
- Shepherding, Counseling, and the Early Church
- The Family and the Early Church
- Evangelism and the Early Church
- Habits of the Heart
- Character of a Leader
- Ministry Priorities and Personal Management
- Ministry Perspectives: Conflicts Without, Fears Within
- Interpreting the Word I: Principles and Procedures
- Interpreting the Word II: Linguistics, Languages, and Study Aids

- Covenants, Unity of Scripture, and Biblical Worldview

Series 2 includes ten courses designed to provide further training for ‘pastor-teachers’ and other gifted leaders (as described in Ephesians 4:11) who are entrusted with either local church responsibility or ministry responsibility beyond the local church level. The courses in this series are divided into three groups, each focused on developing a biblical theology from the scriptures and applying that theology in culture.

- Toward a Theology in Culture
- Old Testament Theology: The Law
- Old Testament Theology: The Former Prophets
- Old Testament Theology: The Latter Prophets
- Old Testament Theology: The Writings
- New Testament Theology: Luke-Acts and the Pauline Epistles
- New Testament Theology: 1 and 2 Peter, James, Jude, and Hebrews
- New Testament Theology: The Gospels of Matthew and Mark
- New Testament Theology: John; 1, 2, 3 John; and Revelation
- Pathways to Constructing Theology in Civilization

Accredited programs of the Antioch School of Church Planting and Leadership Development include the following.

- Certificate of Ministry
- Certificate of Theology
- Bachelor of Ministry
- Bachelor of Theology
- Master of Ministry
- Master of Theology
- Doctor of Ministry in Global Church-Based Theological Education
- Doctor of Ministry in Theology in Culture

5.3.2. Centers of Church-based Training (CCBT)

Headquartered in McKinney, Texas in the USA, the Centers of Church Based Training exist to assist local churches to develop

all believers to maturity and many to leadership in the local church, under the authority of local church leadership, with other churches, through an apprenticeship, on-the-job approach, for Christ's mission of multiplying churches worldwide to God's glory (CCBT 2011; Forman, Jones, and Miller 2004:54).

Founded by Gene Getz, Bruce Miller, and Jeff Jones, CCBT seeks to encourage churches to fulfill their biblically defined equipping role by helping leaders understand and grasp the biblical mandate for development and training in the local church. CCBT fulfills this role by assisting churches to develop intentional developmental paths for discipleship and leadership emergence and providing well-designed resources to enable these processes (CCBT 2011).

5.3.2.1 CCBT's Perspective on Church-based Training

From CCBT's perspective, church-based training has a number of important characteristics (CCBT 2011). By its very nature, church-based training is embedded in the life and ministry of the local church, the local church being the visible manifestation of the body of Christ (also called the family of God and the temple of the Holy Spirit). This training occurs in a non-formal, life-on-life, in-service manner and takes place under the authority and supervision of local church leaders, who are accountable before God to facilitate the maturation of God's people and the development of Christlike leaders. Unlike the classroom-based 'training' so often associated with the typical Bible institute, church-based people development "occurs in and through the real-life, ongoing ministry activities of a local church", featuring "life-on-life mentoring in the context of authentic community" (CCBT 2010).

Fundamental to the church-based leadership development process is an understanding of its underlying purpose and end goal. Ultimately, the purpose of leadership development goes beyond the local church. As in the earthly ministry

of Jesus, leadership development is missional in nature. Churches are to raise up leaders in order to multiply the local church worldwide with a view toward taking the gospel to the whole world (CCBT 2010). Leadership development, indeed people development at any level, brings glory to God by enabling the fulfillment of his purposes and plans through prepared vessels through which the Holy Spirit can work.

CCBT sees the local church as the optimum context for leadership development. According to Miller (2010a), the uniqueness of church-based training lies in its seamless integration into the life of the church. Leadership development is to be part of what the church does, as is evidenced in the life and ministry of Jesus and the Book of Acts.

An intrinsic part of the church-based training philosophy is the importance of partnering with other churches to enhance the leadership development process (CCBT 2010a). Few are the churches that have all the resources necessary to develop mature and balanced leaders.

According to Forman et al. (2004:62-64), once churches accept the biblical mandate for leadership development, it is important that they understand and clarify the type of leaders they need to develop. Employing a 'head, heart, hands' analogy, they suggest that churches seek to produce "wise leaders who are sound in their knowledge of God's Word and his world, strong in character and compassion, and skillful in ministry and mission" (Forman et al. 2004:62). Effective leadership development strategies facilitate more than knowledge of God and the Bible; they promote the development of biblical wisdom as well. Because "leadership is influence" (Sanders 1994:27)⁴⁸, emerging leaders must also be encouraged to develop Christlike character in every area. Paul admonished his protégé Timothy,

Discipline yourself for the purpose of godliness; for bodily discipline is only of little profit, but godliness is profitable for all things, since it

⁴⁸ Though popularized by John Maxwell, this brief definition of leadership is originally attributed to Oswald Sanders in his classic book *Spiritual Leadership*, first published in 1967.

holds promise for the present life and also for the life to come. It is a trustworthy statement deserving full acceptance. For it is for this we labor and strive ... (1 Timothy 4:7-10).

As Ephesians 4:11-12 indicates, emerging leaders must also grow to become servants whose ministry focus is not self-advancement but the equipping of others.

In addition to clarifying the type of leaders they wish to develop, churches must provide a “rich context in which whole-life development can take place” (Forman et al. 2004:65). Forman acknowledges the central role of the Holy Spirit in developing leaders, but stresses the essential facilitative role churches play by providing “an interlocking framework (rather than a formula) to optimize the development” of the emerging leaders in whom God is at work (Forman et al. 2004:65).

5.3.2.2 CCBT's Whole-Life Learning Approach

CCBT advocates a ‘whole-life’ approach to leadership development that features three integrated strategic components: well-designed courses, community, and mentoring relationships (Forman et al. 2004:65). Selection of the course material and learning process is important if the end goal is wise, godly, skilled leaders. Courses that encourage theological reflection in a problem-solving capacity tend to cultivate biblical wisdom (Forman et al. 2004:65). Designed with this goal in mind, the CCBT *Church Leadership Series* develops the emerging leader through “an ordered learning process of scripture, biblical principles, projects, discussion questions and wisdom from current biblical scholars” (CCBT 2010). However, before perusing the *Church Leadership Series*, it is important to understand CCBT’s learning process.

5.3.2.3 The W.I.S.D.O.M. Learning Process

Developed by Bruce Miller out of practical experience and research on learning design (Forman et al. 2004:73), the six step W.I.S.D.O.M. learning process undergirds the overwhelming majority of CCBT discipleship and leadership

development courses (Miller 2011:2). Recognizing the great need for mature church leaders and the central role educational design plays in producing outcomes, Miller sought both to define the type of leaders churches need and to design a process that would produce such leaders (Forman et al. 2004:73). Having identified the need for leaders with biblical wisdom, compassionate and caring hearts, and specific relational and ministry skills, Miller designed a holistic process to facilitate development in all three of these areas. Based upon “biblical truth, ancient wisdom, and contemporary research” (Miller 2011:3), the W.I.S.D.O.M. learning process is designed to develop biblical wisdom, enhance problem solving (a fundamental feature of CCBT’s training methodology), refine character, and promote the development of important skills. Miller readily admits that this process cannot be applied successfully to learning that is primarily knowledge-based or practical (Forman et al. 2004:75); nor can this process stand alone. Miller (in Forman et al. 2004:76) noted that a comprehensive learning process must also include elements such as mentoring, reflective experiences, and participation in community. When applied properly, the wisdom-based process has yielded excellent results in a number of local churches around the world.

The W.I.S.D.O.M. process is built around six fundamental processes, each related to a specific question (Miller 2011:4).

- “Work the issue.” Understand the problem. What is at stake here?
- “Investigate scripture: What does God say?”
- “Seek counsel: What do wise people say?”
- “Develop your response: What do I think?”
- Openly discuss the issue with others. What do we think together? Test your personal conclusions and work toward consensus.
- “Move to action.” Take steps to address the issue. What will I/we do?

Working or grasping the issue involves identifying and exploring a problem, then expressing it as simply and clearly as possible (Forman et al. 2004:76-77). Once the issue is clarified, scripture is consulted (Forman et al. 2004:78-79). In this and in all other stages, sensitivity to the Holy Spirit is essential. After consulting scripture, it is helpful to seek the counsel of godly people who have expertise

regarding the issue of concern. This can be facilitated through live discussions, DVD presentations, the use of articles and books, and online searches (Forman et al. 2004:79). Once scripture and other relevant sources are consulted, an initial response is formulated. This response can take many forms, from prayer to brainstorming options. Wisdom can be enhanced by testing the initial response in the broader community of faith. Discussion among more mature and experienced people, especially with insight from the Holy Spirit, can affirm, challenge, or sharpen responses. Together, leaders indwelt by the Spirit of truth enjoy a synergism that produces biblical wisdom (Forman et al. 2004:80-81). Once tested and refined, biblically informed and Spirit-directed responses are put into practice and applied to the context.

The design of Miller's W.I.S.D.O.M. learning process is based upon on certain aspects of adult learning theory, in particular problem-based learning⁴⁹ (Forman et al. 2004:193-199). Barrows defined problem-based learning as "learning that results from the process of working towards the understanding of a resolution of a problem", where "the problem is encountered first in the learning process" (Barrows and Tamblyn 1980:1). Barrows and Kelson (1993) viewed problem-based learning as both a curriculum and a process. A problem-based curriculum includes carefully designed problems that require critical knowledge acquisition, an ability to solve problems, self-directed learning strategies, and cooperative learning skills. The process parallels the problem-solving realities of daily life and business.

The W.I.S.D.O.M. based learning approach also accommodates postmodern learning perspectives. It recognizes that situations are not always 'black-and-white' and encourages the use of dialog in the development of biblical wisdom. Miller likens this to Aristotle's concept of *phronesis*, the ability to exercise ethical, practical judgment (Forman et al. 2004:196-197). Miller (Forman et al. 2004:197)

⁴⁹ Problem-based learning is generally considered a constructivist approach to learning. Rather than passively receiving information, learners work with new information in a meaningful way and 'construct' knowledge, resulting in a deeper level of understanding and greater application to context.

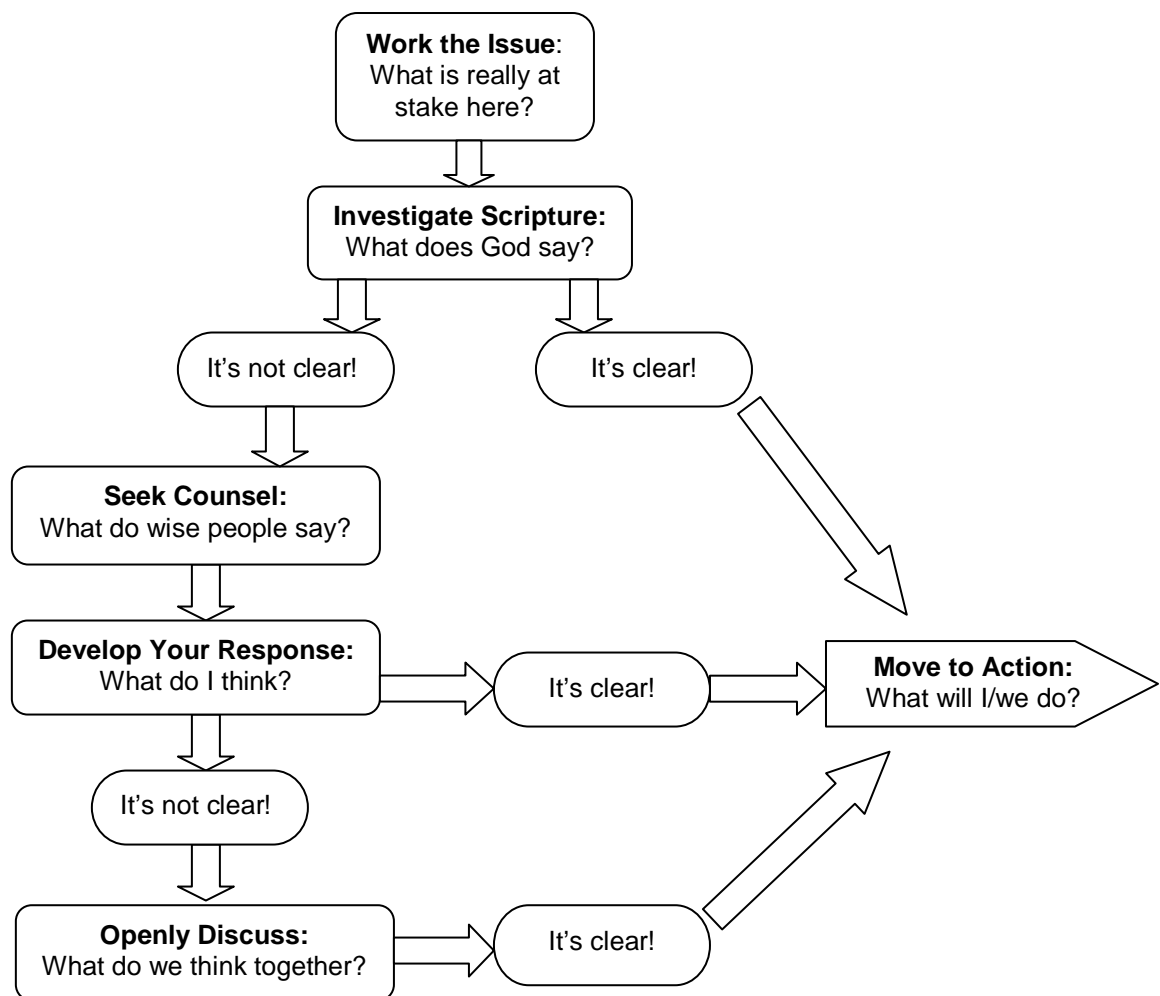
believes this process leads to better theology, with theology not just viewed as something we know, but as something we do.

To theologize is to think biblically and comprehensively about an issue.... Good theology is not only solidly founded on God's Word; it is also developed in the context of the church.... The best theology is done in community with other believers, pursuing Christ's mission to advance God's kingdom (Forman et al. 2004:197).

Miller (Forman et al. 2004:198-199) also cited Jesus' extensive use of engaging dialogue and discussion to support his W.I.S.D.O.M. based learning approach.

Figure 5.4: Flow Chart of the W.I.S.D.O.M. Learning Process

(adapted from Miller 2011:7)



5.3.2.4 *The Church Leadership Series*

Originally developed in 1996 and most recently updated in 2005, CCBT's *Church Leadership Series* targets existing and emerging leaders in the local church. Comprised of four courses (*The Word*, *The Leader*, *The Church*, and *The Mission*), the series utilizes Miller's W.I.S.D.O.M. approach and is designed to equip leaders in "the lifelong pursuit of biblical wisdom" (CCBT 2012) by exposing them to important issues in each of the four designated areas. Best applied in a small group or cohort setting, the *Church Leadership Series* features a rigorous learning process. Though developed as an integrated series, individual workbooks within each course can also be utilized for specific areas of interest.

The Word "encourages church leaders to think worthily of God, His Word, and His world through a study of the basic doctrines of the Christian faith" (CCBT 2010). This course seeks to help leaders clarify their theological beliefs in respect to core orthodox Christian doctrines with a view toward personal transformation and lifelong learning. The text *Bible Doctrine* (Grudem, Grudem and Purswell 1999) is required reading.

The Word consists of the following issues.

Part One: Who God Is — His Word and His Nature

- Issue One: Theology — Why Should Church Leaders Study Theology?
- Issue Two: The Word — Why is the Bible our Final Authority?
- Issue Three: God's Attributes — How Can We Know God More Accurately and Intimately?
- Issue Four: The Trinity — How Can We Understand the Triunity of God?
- Issue Five: The Son of God — Why do We Need to be Clear on the Person of Christ?
- Issue Six: Holy Spirit — What is the Spirit's Role in Our Day?

Part Two: What God Does — His Creation and Redemption

- Issue Seven: Humanity — What are the Effects of "The Fall"?
- Issue Eight: Salvation — Why is God's Salvation so Great?

- Issue Nine: The Church — Why Should We Love God's New Community?
- Issue Ten: Sanctification — How Can We be Holy in a Sinful World?
- Issue Eleven: Angels and Satan — How Should We Relate to God's Agents and Opponents?
- Issue Twelve: God's Future Plans — What Do You Believe About the End Times?

The Leader explores foundational aspects of church leadership with a view toward the development of Christlike servant leadership (CCBT 2010). From a biblical perspective, participants examine topics such as the essence of leadership, authority, teamwork, mentoring, delegation, and equipping emerging leaders. A heavy emphasis is placed upon the role of character in biblical leadership.

Part One: Essence — What is the Nature of Church Leadership?:

- Issue One: The Essence of Leadership — What Does Church Leadership Involve?
- Issue Two: Spirituality — How Can Church Leaders Maintain Authentic Spirituality?
- Issue Three: Character, Part One: Maturity — How Can Leaders Develop Mature Christlike Character?
- Issue Four: Character, Part Two: Credibility — How Can Church Leaders Ensure They are Above Reproach?
- Issue Five: Authority — How Can a Church Leader Be a Servant Yet Have Authority?
- Issue Six: Teamwork — Why Does a Church Leader Need to be a Team Player?

Part Two: Role — What is the Work of Church Leadership?:

- Issue Seven: Shepherding, Part One — How do Church Leaders Care for the Flock?

- Issue Eight: Shepherding, Part Two — How Should Church Leaders Protect the Flock?
- Issue Nine: Leading, Part One — How Can Church Leaders Develop a Compelling Vision?
- Issue Ten: Leading, Part Two — How Should Church Leaders Manage the Vision?
- Issue Eleven: Equipping, Part One — How Can Church Leaders Equip the Next Generation?
- Issue Twelve: Equipping, Part Two — How Can Church Leaders Bring all People to Maturity?

Exploring the Church as the body of Jesus Christ, the family of God, and the temple of the Holy Spirit, *The Church* helps leaders to develop convictions about the balance and focus of local church activity with regard to its biblical mandate. This course examines biblical perspectives on the nature, mission, ministry, and maturity of Christ's Church (CCBT 2010).

Primer: The Church — How do You Tell the Difference Between Functions and Forms?

Part One: What the Church is to Be

- Issue One: Glory — Why is the Church so Special to God?
- Issue Two: Purpose — What is the Significance of the Church in God's Overall Plan?
- Issue Three: Identity — What on Earth is the Church?
- Issue Four: Body — How Can Church Members Complement Each Other?
- Issue Five: Family — How Can You Build Relationships in Your Church?
- Issue Six: Leaders — What are Church Leaders to Be and Do?

Part Two: What the Church is to Do

- Issue Seven: Worship — How Can We Avoid "Worship Wars"?
- Issue Eight: Discipline — How Do We Maintain Purity in the Church?

- Issue Nine: Culture — How Can Churches Reach Out to the World and Not Become Part of the Culture?
- Issue Ten: Finances — How Should Churches Manage Money?
- Issue Eleven: Evaluation — What Does a Good Church Look Like?
- Issue Twelve: Bride of Christ — How Can Your Church Improve?

Centering on a biblical theology of mission, *The Mission* encourages leaders “to design an intentional mission strategy for present and future mission involvement for your church or ministry team while assessing their own personal commitment” (CCBT 2010).

Part One: A Biblical Theology of Mission

- Issue One: God’s Reign — What is God’s Overall Plan?
- Issue Two: Christ’s Mission — What Did Christ Do to Accomplish God’s Plan?
- Issue Three: Church’s Mission — What is the Church’s Role in God’s Plan?
- Issue Four: Local Church Mission — What is the Local Church’s Part in God’s Overall Plan?
- Issue Five: Modeling Mission — How Did Paul Model What Mission Should Be?
- Issue Six: Mission Statement — How Can You Develop a Mission Statement for Your Church or Ministry Team?

Part Two: A Local Strategy for Mission

- Issue Seven: Prayer and Mission — What is the Relationship Between Prayer and the Church’s Mission?
- Issue Eight: Evangelism and Mission — How Can We Overcome Barriers to Share the Good News?
- Issue Nine: The Poor — What is the Relationship Between Evangelism and Social Concern?
- Issue Ten: Church Planting — What is the Place of Church Planting in the Overall Mission of the Church?

- Issue Eleven: Cross-Cultural Missions — How Can Churches Reach People Across Cultural Boundaries?
- Issue Twelve: Mission Strategy — How Can We Develop a Biblical and Comprehensive Strategy of Mission?

CCBT also features a course call the *Life Development Planner*. Compiled by Jones and Forman (2002), this tool helps existing and emerging leaders to develop a better understanding of God's purposes in the world and how they are to participate in the fulfillment of those purposes. Utilizing scripture, reflection, self-discovery tools, practical exercises, group discussion, and J. Robert Clinton's ministry time-line tool (1988:39-56), this highly interactive course enables the leaders to construct a 'Life Development Plan' to provide strategic perspective and direction for life and ministry. To provide the necessary insight for the plan, participants construct a life purpose statement, complete a 'divine design' inventory, construct a life and ministry time-line, and conduct a self-analysis on knowledge of scripture, character, and ministry skills. Ultimately, the purpose of this course is to assist the church to develop intentional strategic growth pathways for discipleship and leadership development.

These resources are available through the CCBT website at <http://ccbt.org>.

5.3.2.5 *The Role of Community*

Forman et al. (2004:66-67) asserted that learning occurs best in the context of community. Bickford and Wright (2006:4.2) concur: "Research on learning theory, how the brain works, collaborative learning, and student engagement has taught us that people learn best in community".

As Bruce (1971) so eloquently portrayed, Jesus utilized a community setting to train the Twelve. Forman et al. (2004:89) noted that, from a biblical perspective, the church is "God's called-out-people-in-community". Forman et al. (2004:67, 92) stressed the importance of modeling this type of community for emerging leaders and using team gatherings and study groups for more than decision-making or study. These group environments provide a platform for admonition, edification, and accountability in an atmosphere governed by Christlike love.

5.3.2.6 The Role of Mentoring

In addition to wisdom-based courses and learning in community, the CCBT also emphasizes the value of mentoring. From their perspective, Christian mentoring is a “purposeful spiritual friendship to encourage growth in both the mentor and the protégé” (Forman et al. 2004:67). Mentoring, according to Forman et al. (2004:100-111), entails intentional and purposeful life-on-life apprenticeship expressed in five important roles: identification of potential leaders, serving as an example worthy of imitation, providing instruction as a teacher, involvement as a coach in ministry and mission, and releasing emerging leaders into ministry as part of a broader team. This type of relational investment is both biblical and essential. Rather than forcing artificial relationships, church leaders need to value and model intentional spiritual friendships, including ‘fathering’ and ‘mothering’, and provide an atmosphere conducive to the development of such relationships.

In summary, well-designed courses, community, and mentoring are all part of an effective, whole-life process of leadership development. These three elements are not to be viewed independently, but rather a part of an integrated process. Properly designed courses provide great opportunities for the development of authentic community and meaningful mentoring relationships (Forman et al. 2004:68). Mentoring begins to occur naturally as community develops. Through this process, gaps in knowledge, character, and ministry skills begin to become evident and provide excellent opportunities for growth and development.

5.3.3 LeaderSource SGA

Founded by Malcolm Webber, LeaderSource Strategic Global Alliance is a Christian leadership development organization that seeks to strengthen and expand the church worldwide, especially in poor or ‘closed’ countries, by building healthy spiritual leaders (LeaderSource SGA 2011). In addition to serving as president of LeaderSource SGA, Webber holds a Ph.D. in organizational leadership from Regent University, serves as a senior pastor, and has authored over thirty books. The purpose of LeaderSource SGA is “to catalyze indigenous movements of healthy leader development and care, and thereby accelerate

church planting and disciple-making around the world — especially in regions of fast church growth” (Leadersource SGA 2011) .

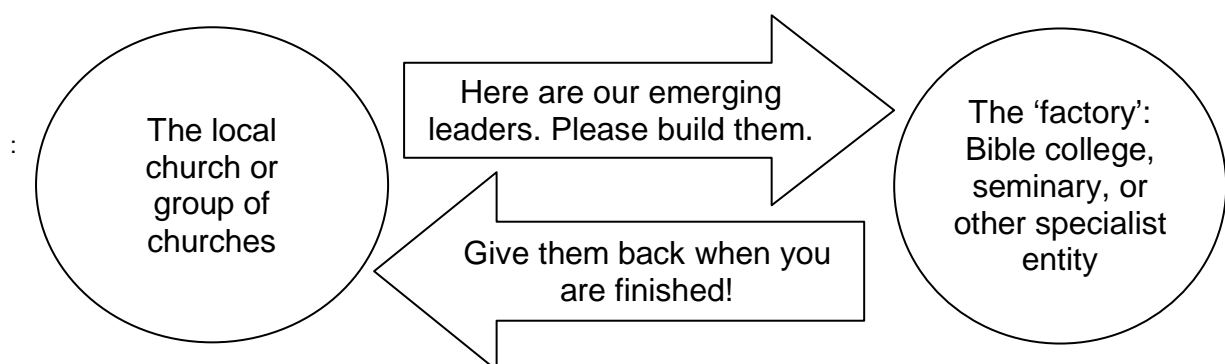
According to Webber (2008a:6), building leaders was a central purpose in the earthly ministry of Jesus and the New Testament church. Today, leadership development remains a core responsibility of church leaders. Though, ultimately, God himself develops leaders, leaders cooperate with God to build other leaders as part of God’s plan (Webber 2008a:30). ‘Builder’ leaders help emerging leaders to understand the past working of God in their lives, recognize and respond to God’s present dealings in the context of their immediate life and ministry, and prepare for God’s future work in and through their lives and ministries (Webber 2008a:31-32). Leader development processes assist the emerging leader to understand God’s intentions and cooperate with his transformational dealings.

5.3.3.1 Approaches to Leadership Development

Webber (2008a:40-42) noted that there are three prominent approaches to leadership develop within churches. In the traditional approach to building leaders, the local church sends or releases emerging leaders to a Bible college or seminary (the ‘factory’ as he calls it).

Figure 5.5: The Traditional Approach to Training Church Leaders

(Webber 2008a:41)



This ‘factory’ mentality has serious shortcomings (Webber 2008a:41-42). Academic institutions are generally expensive and usually only accept a limited number of applicants from any particular church. In many cases, students are

removed from the very life and context so vital to their development. Making matters worse, these emerging leaders often do not return to the sending church. Complicating the situation further, this factory mentality also tends to absolve the local church of the ongoing responsibility of helping their emerging leaders to mature.

This 'factory' scenario also results in confusion about what actually qualifies people for ministry. Many churches look for degreed individuals, when character and capability are what is most important. According to Webber (2008a:42), this central factory mentality has done much to undermine local church leader development, reducing both the number and quality of leaders produced and negatively impacting the spiritual and social dynamics of the church. Moreover, making a degree or diploma the central qualifying factor for ministry leadership exacerbates the already problematic clergy-laity divide so common in today's churches.

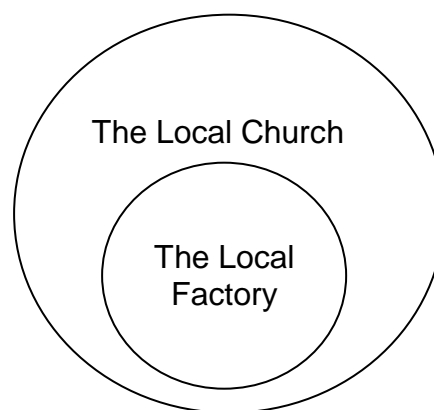
Advocating a shift in emphasis, Webber (2008a:42-43) stressed that the local church (or network of churches) provides the best context for leadership development. Instead of focusing on an institutionalized, knowledge-based approach isolated from a ministry context, leadership development within a local church provides an experiential, contextual, whole-life approach that is both more accessible to the broad range of church leaders and more effective in developing actual ministry capabilities.

A more effective approach to developing leaders might be for churches to move the factory back home, to establish their own internal Bible and ministry school (2008a:43). This still provides a role for advanced learning, often in partnership with Bible colleges and seminaries, but maintains the context so essential to effective development. A 'local factory' is able to integrate the church's essential beliefs, values, and vision into the developmental process. In addition, significant relationships are maintained, as is accountability. These factors increase the likelihood of emerging leaders continuing with the church once this developmental period comes to an end.

Webber (2008a:44) noted, however, that there are shortcomings to this model as well. It is all too possible that, in the 'local factory' scenario, the local church may not be personally and vitally involved in the building process. It is not enough to 'relocate' the seminary to the local church. If the training process remains primarily academic and theoretical, or if the local church cannot provide the necessary resources and teachers/facilitators, the quality of this process will be compromised. In addition, if the focus remains on attaining a diploma or degree, the clergy-laity caste system is likely to be reinforced.

Figure 5.6 The Local Factory in the Local Church

(Webber 2008a:44)



5.3.3.2 *The Learning Community*

Webber (2008a:45-46) favors a third, more integrated approach in which leader development is facilitated within a "learning community"⁵⁰ connected "immersively

⁵⁰ The concept of learning in community is a common theme. Csinos (2010:45-62) observed that the learning community formed by Jesus shared characteristics with the concept of *situated learning* suggested by Lave and Wenger (1991:15). Situated learning proposes that learning best takes place in a "participation framework" as part of a community of practice. Situated learning occurs as a person joins a community and increasingly participates in the beliefs and practices of that community (Csinos 2010:46). Wenger et al. (2002:4) refer to "groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an on-going basis" as *communities of practice*. In addition, Vygotsky's *social constructivism* suggests that knowledge and understanding(s) are "constructed when individuals engage socially in talk and activity about shared problems or tasks" (Driver,

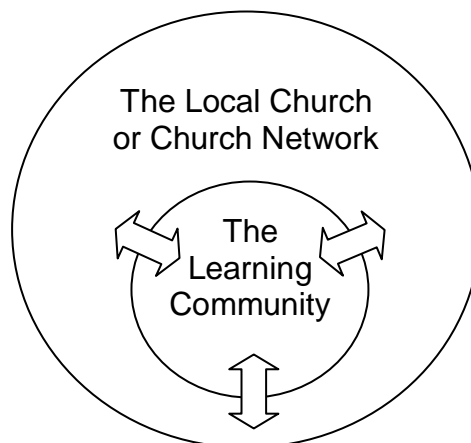
and pervasively” to the local church community. Foundational to Webber’s ConneXions model, such a learning community ensures that leader development is fully integrated into the life and ministry of a local church (or network of churches). Leaders in this community help build emerging leaders; and emerging leaders learn to lead in this community. Not only is this model ‘church-based’, it is ‘church-integrated’.

A healthy church community is one in which every member functions properly (Webber 2008a:52-53). Paul described such a church community in his letter to the Ephesians.

We are to grow up in all aspects into Him who is the head, even Christ, from whom the whole body, being fitted and held together by what every joint supplies, according to the proper working of each individual part, causes the growth of the body for the building up of itself in love (Ephesians 4:15-16).

Figure 5.7: The Local Church Learning Community

(Webber 2008a:45)



In the healthy church community, each member is connected to the head and is growing toward maturity in Christ. In addition, each member is ‘working’, operating in his or her God-given gifting and capacity as the Holy Spirit leads,

Asoko, Leach, Scott and, Mortimer 1994:7). See sections 3.3.6.4. and 4.3.6.2.

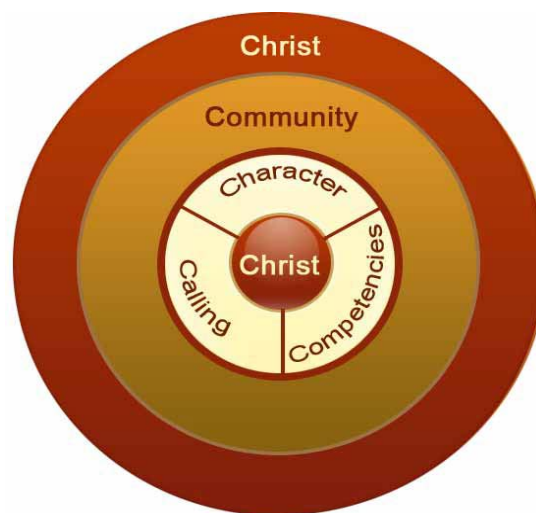
building up one another in Christ, thus causing the growth of the body (Webber 2008a:53).

A healthy church is one in which every member grows, serves, and builds others.... And all three must come from ... the indwelling life of Christ in each believer's life ... as he or she grows, serves and builds (Webber 2008a:54).

Webber (2008a:54) stressed that church-integrated leader development requires the creation of a culture of leader development characterized by shared beliefs and values matched by supportive attitudes and actions. Nurturing and sustaining a culture of 'people building' in the local church will, in Webber's opinion, enable the broader Church to make inroads in addressing its leadership deficit, especially in the developing world.

Figure 5.8: The '5C' Model of a Healthy Leader

(Webber 2011)



5.3.3.3 '5C' Leadership

Developed by Webber (2008a:21), the ConneXions model focuses on the development of healthy leaders in the context of the local church. An important feature of Webber's ConneXions model is the '5C' leadership model. This model essentially represents the 'developmental goal' in the Webber model. Holistic in

perspective, the '5C' leadership model highlights five key characteristics of a healthy Christian leader.

- Christ — The leader knows Christ and has a healthy spiritual life. Jesus Christ is the center of the leader's being; and he or she represents Jesus accurately and fully to the world.
- Community — The leader is formed and lives within a supportive and accountable community.
- Character — The leader has integrity.
- Calling — The leader understands and embraces God's purpose and represents it with credibility, clarity, and passion.
- Competencies — The leader is equipped with gifts, skills, and knowledge needed to lead people in the accomplishment of this purpose.

In this model, Christ Jesus and the community form the context in which the leader's capacities (character, calling, and competencies) are developed and exercised. However, not only does Christ provide the context of development, he is also the center of the leader's life and the source of life in the community.

5.3.3.4 Dynamics of Transformation

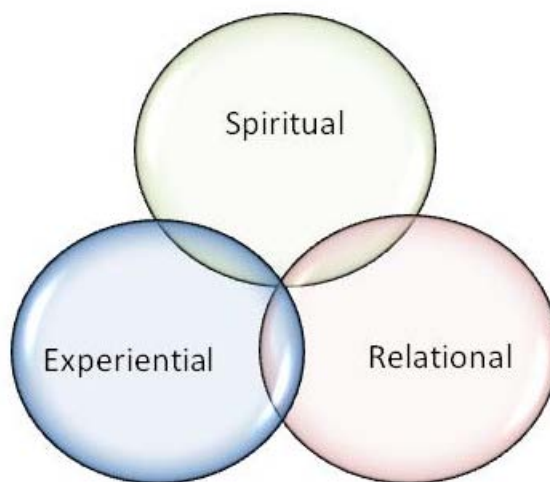
The ultimate goal in the ConneXions model is "the holistic transformation of the Christian leader into the mature image of Jesus Christ" (Webber 2011). Sadly, most leadership training efforts focus on content, but underemphasize the *process* of development, which includes context as well as content. Though content (curriculum) is certainly an important part of leadership development, process is essential for transformation (Webber 2008a:9).

In Webber's (2008a:9-10) perspective, the essence of Jesus' method of leadership development is found in Mark 3:14-15: "And He appointed twelve, so that they would be with Him and that He could send them out to preach, and to have authority to cast out the demons." Jesus did not just teach his disciples; he created a transformational context, a learning environment characterized by authentic spirituality, relational intimacy and accountability, and experiential learning. It was against the backdrop of this multifaceted, transformational

context that Jesus provided the content for their development — the transformational word of God.

Figure 5.9: Elements of a Transformational Context

(Webber 2008a:9-10)



In order to facilitate the holistic transformation of emerging Christian leaders into the image of Christ, church leaders must seek to create a church-integrated design for leader development that seamlessly merges context and content into “one united collage of transformation” (Webber 2008a:12). As Webber (2009:9) noted, there is no single ‘correct’ way to design church-based training processes. Many methods have been developed, some of which are spontaneous, intuitive, and relatively simple, and others that are systematic, methodical, and complex. According to Webber, the key is integrating and utilizing the elements that facilitate transformation.

Combining the elements of content and context gives us the four essential dynamics of transformation in the development of Christian leaders (Webber 2008a:9-10).

- Spiritual - the transforming power of the Holy Spirit
- Relational - the transforming power of relationships
- Experiential - the transforming power of life experiences
- Instructional - the transforming power of the word of God

Webber noted that far too many leader development approaches, while acknowledging the need to build the whole person, endeavor to achieve this goal through primarily academic (cognitive) processes, perhaps with a few peripheral activities tacked on (Webber 2008a:14). This is rarely effective. To be transformational, leader development models should include all four dynamics integrated into an intentional, holistic design that seeks to produce emerging leaders who are Christlike in character, established in the understanding and application of God's word, and equipped with the ministry skills needed to exercise leadership among God's people (Webber 2008a:14).

5.3.3.6 Elements of Effective Leader Development

The end goal of a church-based training process is the development of healthy, reproducing Christian leaders. As such, the development process begins with a clear definition of a healthy leader (Webber 2008a:208). Developing healthy spiritual leaders requires a holistic process that includes spiritual, relational, experiential, and instructional aspects. Indeed, according to Webber (2008a:13), the best leader development occurs through church-integrated designs that are built around these four transformational dynamics. As a spiritual process, the building of leaders occurs in submission to and cooperation with the Holy Spirit. God himself ultimately directs this process; so it must be saturated in prayer (Webber 2008a:29, 34-37). As a relational process, leader building occurs within the context of dynamic relationships between emerging leaders and mature leaders, in teams, and through interaction with other emerging leaders and believers in the community.⁵¹ It is important to understand that leaders build leaders, and that leaders can only be built a few at a time. An experiential process, leader development occurs in the context and challenges of real life and ministry. Jesus utilized an 'in-service' training model for a very good reason. Challenging assignments, learning on the job, and trials all enhance the developmental process. Leader development also requires effective instruction. God's Word must be taught in a way that is relevant, practical, engaging, and

⁵¹ Ogden (2003:154) identified "intimate, accountable relationship" as a foundational element for transformational development.

appropriate to the learner and context. The production of critical thinkers and effective leaders requires emerging leaders to be active learners, not just passive receivers of information (Webber 2008a:163). As did the Lord Jesus, those who seek to develop emerging leaders need to give prayerful and careful consideration to the best ways to achieve the desired developmental results. Instead of ‘filling the bucket’ (as Webber calls it), builders need to work with the Holy Spirit to create experiences that result in transformative learning.⁵²

Finally, leader development is most effective when intentional (Webber 2008a:14). Responsibility for the development of leaders must be shared among the builders, community, and emerging leaders themselves. Builders provide emerging leaders with learning opportunities, modeling, mentoring, and assigned responsibilities. The community promotes growth through supportive relationships, the provision of resources, prayer, and even conflict and correction. Since growth is not automatic, the emerging leader must be committed to the process.

Balanced growth requires exposure to a number of different leaders and learning experiences over time. An emerging leader needs to undergo a mixture of learning experiences both as an individual and as part of a team. It is in teams that some of the best learning occurs (Webber 2008a:194-200). Both individual and team learning experiences should move from simple to complex, as Jesus modeled (Webber 2008a:200).

Leader development is a long-term process and must be adapted to facilitate God’s unique purposes for each emerging leader. Too many leader development initiatives adopt a short-term perspective and endeavor to build ‘up’ before building ‘deep’. A solid foundation requires a breadth of authentic learning that

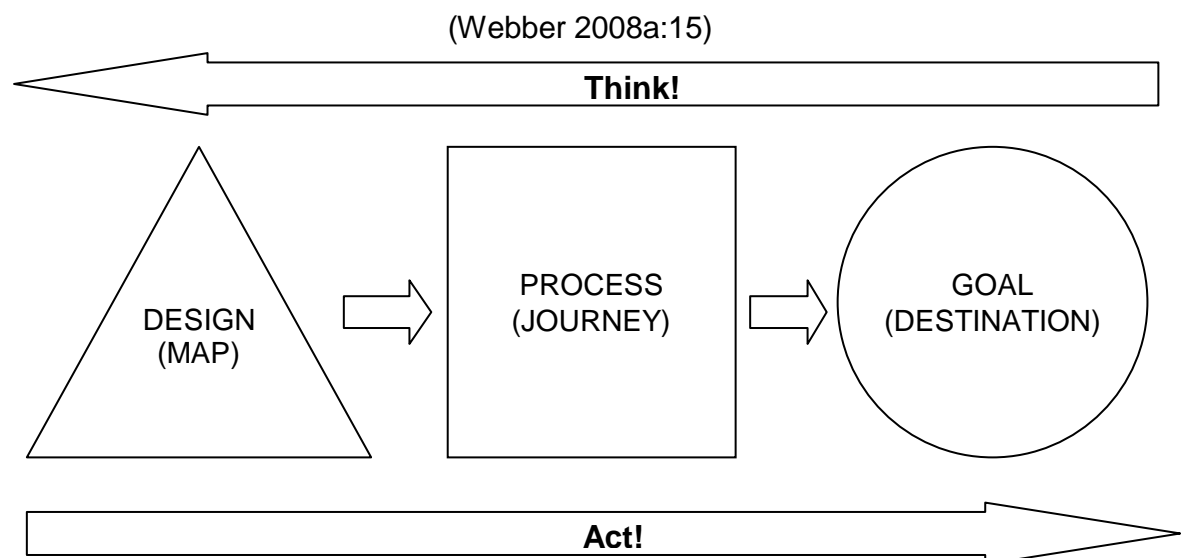
⁵² Cranton (2006:vi) described transformative learning as “a process by which previously assimilated assumptions, beliefs, values, and perspectives are questioned and thereby become more open, permeable, and better justified.” As O’Sullivan et al. (2002:11) explained, transformative learning involves “a shift of consciousness that dramatically and permanently alters our way of being in the world”, including “our understanding of ourselves and our self-locations....” It affects worldview and changes the way people perceive reality. See section 3.3.8.

penetrates deep into the heart. Only once the foundation is solid can the building be safely built (Webber 2008:183-187).

5.3.3.7 Design in the ConneXions Model

The ConneXions model provides a strong platform for the design of holistic, transformational church-integrated leadership training and development for emerging leaders. Webber's (2008:17) design process includes three essential components: the goal, the process, and the design. The goal is expressed in a clear definition of a healthy Christian leader (the '5C' leader). The process includes the four transformational dynamics through which the goal is achieved. The design entails the 'curriculum' or planned learning design associated with the process.

Figure 5:10: Components of the ConneXions Design Model



The design can be compared to a blueprint for a building or a map that guides a traveler to his destination. According Webber (2008:17), too many churches and ministry organizations give too little thought to design, instead stringing together a number of unrelated courses, sessions, or books in the hope that holistic development will occur.

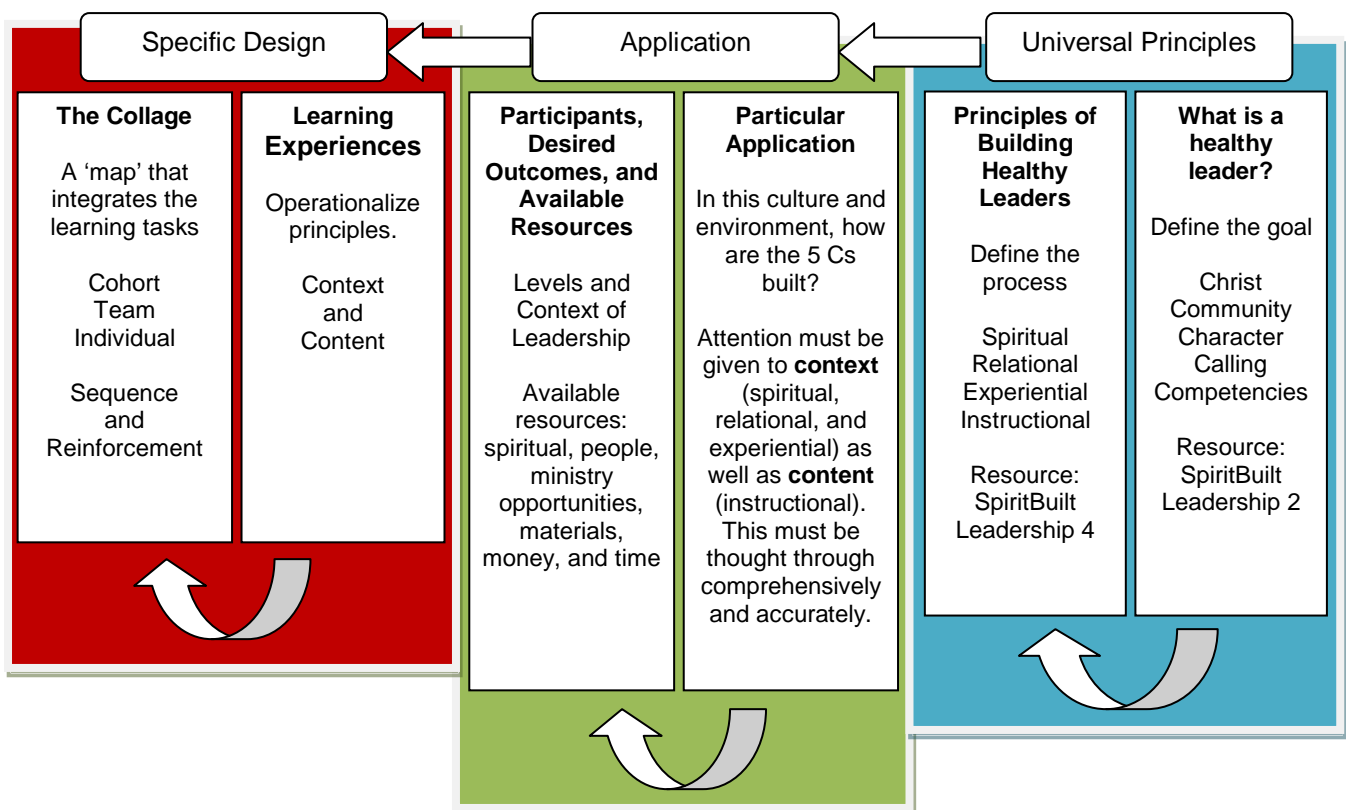
Webber's (2008a:207-211) model provides a simple strategy for designing a leadership development process. Using the '5C' model, the design process

begins with the end in mind⁵³ — healthy, effective leaders who know God experientially, were formed and live in community, demonstrate integrity, know the purpose of God for the church and their lives, and have the gifts, skills, and knowledge needed to lead people in the accomplishment of God's purpose. Once the objective is clearly defined, designers must identify the biblical principles and processes that facilitate the formation of such leaders.⁵⁴ These are found in the four dynamics of transformation — spiritual, relational, experiential, and instructional.

When all four dynamics are strongly present in a design, spiritual life is nurtured, relational capacities are strengthened, character is developed, calling is clarified, and deep leadership capacities are built (Webber 2008a:209).

Figure 5:11: The LeaderSource SGA Model for Process Design

(adapted from Webber 2008a:207)



⁵³ Similar to the backward design approach of Wiggins and McTighe in section 2.3.6.

⁵⁴ Webber's process obviously draws from some of the instructional design models featured in chapter 2.

As the design process moves into the application stage, designers must consider both the uniqueness of the context and the uniqueness of the emerging leaders (Webber 2008a:215-218). They must seek to answer the question, “In our context and with these individuals, how can biblical principles of leadership development be applied to build ‘5C’ leaders?” To attain the desired outcomes, attention must be paid to the participants’ backgrounds and levels of experience, as well as to the context of present and future leadership. In addition, the availability of resources, personnel, and ministry opportunities must be considered.

Once enough time and thought has been invested in the application phase, the specific design can be built. Learning experiences must be created that operationalize all that has been defined (Webber 2008a:218). Learning experiences should be diverse, intentional in their focus on the five ‘C’s, and inclusive of all four dimensions of transformation.

In the final stage, a design ‘collage’ is created. This collage serves as a ‘map’ that defines how emerging leaders move through the various learning experiences, both as individuals and a part of a learning community (Webber 2008a:219), toward the developmental goal (a ‘5C’ leader). Sequence is important. Learning experiences should be arranged in such a way that each one builds on previous learning and prepares emerging leaders for future experiences.⁵⁵ Learning should be reinforced as necessary. The design process must not be rushed; and it must be saturated in prayer!

5.3.3.8 A LeaderSource Case Study

The following case study (LeaderSource 2009) was compiled after successful application of the LeaderSource model in a Chinese context. In 2006, after frustration with poor results from other training options, a Chinese ‘house church’ network leader, who cannot be named for security reasons, decided to experiment with the ConneXions model. After running three consecutive one-

⁵⁵ Vella highlighted the importance of sequence and reinforcement in her twelve principles of effective adult learning. See section 2.3.9.1.

year training programs for emerging leaders, the pastor reported a significant increase in personal growth and transformation, not only among the participants, but also in their churches as well. A follow-up study indicated that eighty percent of the participants in these three leadership development courses were involved in local church ministry at the time of the study. An unexpected benefit from the implementation of ConneXions training was the large percentage of more mature leaders who curtailed other activities outside the church in order to assist with this developmental process. In addition, as a direct result of the transformational impact of the ConneXions training, many non-participating church members increased their commitment to ministry service. The transformational impact of the training schools also brought a release of finances in support of the training from the people in the church.

As part of the developmental process, the ConneXions model involves the appointment of mentors and intercessors for each emerging leader. The regular meetings between the increasingly enthusiastic learners and their mentors and intercessors had a very positive effect on both the course participants and their more mature counterparts.

Perhaps most meaningful, the obvious change in the lives of the initial ConneXions participants and the subsequent blessings they brought to their churches motivated an increasing number of young people with leadership potential to enroll in the ConneXions leader development process.

In a follow-up study (LeaderSource 2009), another Chinese pastor sent one group of potential leaders to the ConneXions course and another group to a national Bible school. The outcome was telling. Of the twelve potential leaders who attended the Bible school, only two went into ministry. In contrast, of the seventeen potential leaders who participated in the year-long ConneXions course, fourteen are in active church ministry. According to this Chinese church leader,

Today, the majority of our coworkers' teams are ConneXions graduates. They shoulder most of the ministry responsibilities in the church — teaching, doing pastoral work, and traveling among all

our house churches. The church relies heavily on these young graduates, and they are doing a great job (LeaderSource 2009).

Table 5.1: Contrast in Traditional and LeaderSource SGA Approaches

(Webber 2008a:204-205)

Traditional Schooling	LeaderSource ‘Collage’
Teacher-oriented	Learner-oriented
Time-bound	Flexible
Sequential	Dynamic
Classroom	Field-based
Teaching lectures	Teaching, mentoring, coaching
Textbooks/manuals	Experiential
Predetermined	Continually redefined
‘Safe’	Volatile

5.3.3.9 Helpful Courses and Tools

LeaderSource SGA offers the following courses to equip church leaders in the design of church-based leadership development processes.

- What Leaders Do
- Building Healthy Leaders
- Discover ConneXions
- Leader Development by Evaluation
- Designing a Collage
- Doing Design
- Advanced Design
- Bringing Theology Back to Life
- Building Healthy Youth Leaders

The organization also provides a helpful set of free online evaluation tools on their website⁵⁶. These instruments help to evaluate spiritual, personal, relational, leadership/ organizational competencies.

Competencies Toward God

- Discipline, Dealings, Dependency (21 questions / about 4 minutes)

Personal Competencies

- Unhealthy Thought Patterns (99 questions / about 17 minutes)
- Servant Leader Inventory (30 questions / about 5 minutes)

Competencies toward Others

- Listening Effectiveness Inventory (22 questions / about 4 minutes)

Organizational Competencies

- Healthy Follower Inventory A (20 questions / about 4 minutes)
- Healthy Follower Inventory B (11 questions / about 2 minutes)
- Leader Manager (1) Direction (15 questions / about 3 minutes)
- Leader Manager (2) Alignment (15 questions / about 3 minutes)
- Leader Manager (3) Achievement (15 questions / about 3 minutes)
- Leader Manager (4) Personal Qualities (15 questions / about 3 minutes)

LeaderSource also provides additional online resources such as Leadership Letters (<http://www.leadershipletters.com/>) and Leaderpedia.com.

5.4 Local Church Models of Leadership Development

This section examines proprietary leadership development models forged by two South African megachurches. Both of these churches have multifaceted ministries, employ a small group discipleship strategy, and have experienced

⁵⁶ <http://www.leadersource.org/resources/instruments/instruments.php>

strong numerical growth over the past fifteen years. As evidence of their fruitfulness, the entire pastoral team at both churches is ‘homegrown’.

5.4.1 Maranatha Community Church

Located in Kempton Park, South Africa, Maranatha Community Church is a nondenominational megachurch with a Sunday attendance of approximately 4500 people. Founded in 1907 as a small interdenominational Sunday school for English-speaking children, Maranatha has grown over its one hundred year history into a large church with a multifaceted ministry. Forty years of leadership under former senior pastor Deryck Stone saw the church undergo several key transformations, all of which enhanced the church’s ministry and stimulated growth. Most significant for the purposes of this project was the transition to the cell church model in 1996. With helpful input provided by Dr. Ralph Neighbor Jr. and Lawrence Khong (senior pastor of Faith Community Baptist Church in Singapore), Maranatha underwent a transformation in ministry philosophy, vision, and structure, completely redefining the ministry strategy of the church.

In spite of the large Sunday attendance, Maranatha claims to be a “church of small groups” (Maranatha 2012). At present, 175 formal groups meet each week in homes throughout the area. There are also a large number of informal gatherings for fellowship, mutual edification, mentoring, and accountability. Small groups are associated with one of nine specific congregations. Six are based upon geographic region, and three are based upon age. Each congregation is pastored by one or more full-time couples who, in turn, supervise a team of carefully selected ‘shepherds’, each responsible to oversee four or five home groups. Home groups are facilitated by trained leaders and follow weekly guidelines developed by the pastoral staff. According to the church website, involvement in these weekly small groups enables participation in the “life of the church” (Maranatha 2012).

Maranatha expresses its purpose as “to love and to worship God passionately, to influence people to know and love Him, and to build each other up to achieve our life’s purpose” (Maranatha 2011:3). The church’s ministry entails three Sunday celebrations in which people are inspired to worship God passionately and to

respond to the practical ministry of God's word, midweek small groups in which people can build each other up in Christ and enjoy accountable relationships, a dedicated training center to mature and equip members for ministry, an effective ministry to young people and children, a center to provide biblical counseling for members and the community, and intentional outreach into the community, nation, continent, and world, all with a view toward making disciples and equipping people for ministry, or supporting other ministries that do.

5.4.1.1 Leadership Training at Maranatha

Maranatha's transition to the cell church model in 1996 created an urgent need for cell leaders and, thus, cell leader training. Early courses simply utilized materials developed by Neighbour and Khong. However, over time the courses were modified to fit Maranatha's vision and context. As the church grew, so did the need for trained leaders at all levels in the church. In 2000, to help address this need, the eldership established a dedicated training department. In addition to updating cell leader and shepherd training, pastors developed a two-year equipping course for potential church leaders called MTT (Maranatha Theological Training) (Olivier 2012). Utilizing lecture, group discussions, and group projects, MTT consists of two yearlong courses, one on the Bible and the other on doctrine, discipleship, leadership, and ministry. Assessment is based on exams and group exercises that test the ability of participants to work with the content. A 'recognition of prior learning' agreement has been struck with South African Theological Seminary, providing those who successfully complete MTT with substantial credit toward a bachelor's degree in theology. In 2002, Maranatha also launched its yearlong Progressive Pastoring course to assist leaders at other churches with the transition to the cell church model.

Maranatha's courses are regularly evaluated; and cell leader training, shepherd training, MTT, and Progressive Pastoring have all been modified over the years. Under the new senior pastor, Leonard Stone, the church has continued to evaluate and expand its ministry focus and leadership development processes. Maranatha's training department continues to address these needs by updating and adding courses on a regular basis (Maranatha 2011:27-29).

5.4.1.2 Maranatha's Development Path

Embracing the call of Jesus to make disciples, Maranatha starts the developmental process when people join the church. Becoming a church member requires participation in a weekend event called 'Joining God's People' (Maranatha 2011). This special gathering allows for vision-casting by pastors, bonding among pastors and new members, and integration into the church's small groups and equipping processes. New members are also taught about salvation, baptism, stewardship, a life of praise and worship, and common traps in a Christian's life. In addition, they are introduced to training courses and opportunities for involvement in the ministry of the church. According to Pastor Michael Olivier (2012), approximately eighty-five percent of those who participate in this introductory course are successfully integrated into small groups. New members are also urged to participate in two foundational courses within the first year — 'Living in the Spirit' and 'Reading God's Word'.

Maranatha has several avenues through which giftedness and leadership can emerge. The most fruitful source of leaders for the church is the small group ministry. Interestingly, every member of the church's current pastoral team emerged in this manner (Olivier 2012).

A well-defined developmental path exists for leaders who emerge through small group ministry. Potential cell leaders are identified by small group leaders or area shepherds and full-time congregational pastors who visit home groups on a regular basis. After consultation among the group leader, area shepherd, and congregational pastor, small group participants with a passion for God, a passion for people, an upright testimony, a desire to lead, and appropriate giftedness are selected for focused mentoring by the area shepherd. Potential leaders who show extraordinary promise may be selected for the congregational pastor's special 'invite and invest' mentoring process (Stone 2012). Emerging leaders are then urged to participate in a number of the church's equipping courses. All members are encouraged to participate in basic courses such as 'Reading God's Word', 'Living in the Spirit', 'Evangelism and Discipleship', and 'Hearing God'; but, unless they already demonstrate the equivalent competencies, this is essential for those who seek to be involved at leadership level (Olivier 2012).

According to Olivier (2012), when the initial courses have been completed and consensus is reached among the cell leader, shepherd, and congregational pastor, the potential leader is asked to consider becoming an assistant (trainee) small group leader and invited to complete phase one of the cell leaders training. During or after this course, this person is appointed as an assistant small group leader. The assistant is mentored by the cell leader and participates in shepherd's meetings. As the group grows and plants a new home group, or if the existing leader steps down, the assistant becomes the group leader. At this stage, the new group leader undergoes the second phase of training. Should this leader demonstrate genuine commitment, Christlike character, biblical wisdom, a pastor's heart, fruitfulness in ministry, and leadership ability, the congregational pastor may consider asking the small group leader to take on a 'shepherding' role. Shepherds oversee four to five small groups and report directly to the congregational pastor(s). Shepherds undergo training in the biblical responsibilities of leaders, small group supervision, and the selection and mentoring of emerging leaders (Olivier 2012).

When the need arises for an additional full-time pastor, primary consideration is given to shepherds who demonstrate a pastoral call upon their lives (Stone 2012). After a prayerful assessment process that considers character, spiritual maturity, life circumstances, giftedness, past performance, and sense of calling, a shepherd may be appointed for a three-year probationary period as a trainee pastor working under the supervision of a congregational pastor. Trainee pastors complete the two-year MTT program and participate with the full-time pastoral team in ongoing training. During this period, trainees are welcome to participate in elders' meetings and the pastors' weekly small group; but many continue part-time in their secular jobs until their full-time appointment. Trainees also become part of an accountability group made up of several pastors.

At the end of the three-year probationary period, trainees are prayerfully assessed by the senior pastor and steering team (Olivier 2012). Those who have successfully completed MTT and have demonstrated the commitment, character, collaboration, capacity, competence, and sense of calling necessary for pastoral ministry, are appointed to a full-time position in the leadership team, depending

upon their gifting. Should the steering team be uncomfortable with the prospect of appointing a trainee, he or she is released to consider other ministry options.

There are obvious advantages and disadvantages to Maranatha's primary development process. On the positive side, the process is relational, experiential, and context-based. Emphasis is placed on the development of character and ministry competence. A balanced approach, it includes elements that are informal, non-formal, and formal (accredited). Risk to the church is minimal and the process is very cost effective.

Unfortunately, Maranatha's approach also has limitations. The system is primarily designed to facilitate the development of pastors; and those with a non-pastoral calling or gifting may be disadvantaged. However, as the church diversifies, more non-pastoral leadership roles are being created. In addition, because the developmental path is largely internal, emerging leaders who are not exposed to other churches and perspectives may end up with a limited spiritual worldview. Moreover, leaders who choose not to pursue further studies at South African Theological Seminary or another accredited institution may find their options limited if they choose to leave the church and seek ministry opportunities elsewhere.

There are other opportunities to grow into leadership at Maranatha. In 2012, Maranatha launched an intern ministry program for young leaders. Known as MST (Maranatha Service Team), this program provides the opportunity for handpicked young adults to receive special ministry training while engaging in church, school, and community ministries. MST members participate in MTT, specialty courses at Hatfield Christian Church, and life coaching assessments. Other opportunities for service, training, and development are found in the church's ministry team, children's ministry, youth ministry, counseling center, community outreach teams, and 'Christ the Only Hope' church at Modderbee prison.

Figure 5.12: Maranatha's Leader Development Flowchart

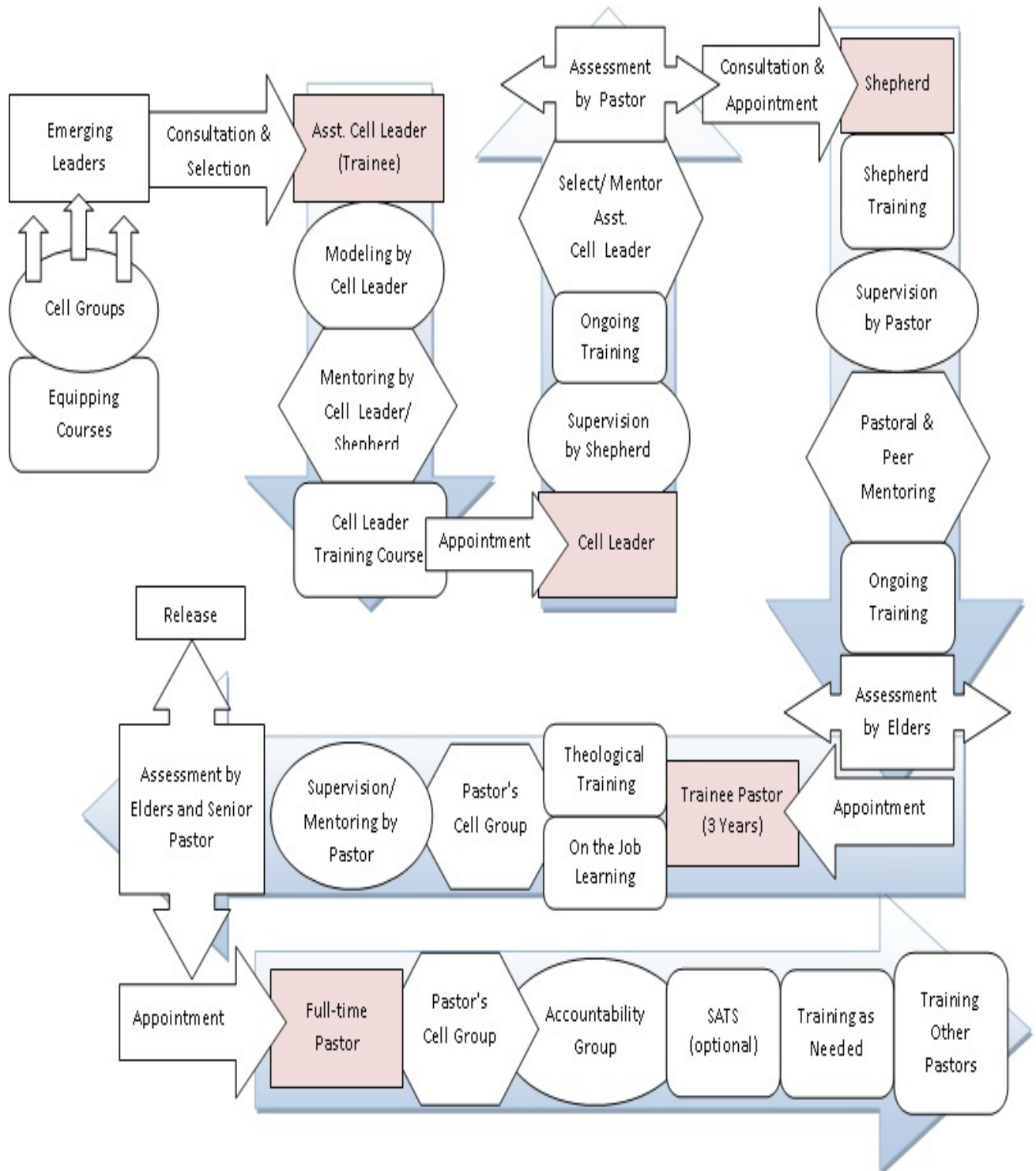


Table 5:2: Maranatha Training Courses

Basic Equipping (New Members)	Joining God's People	Foundational course for new church members
	Living in the Spirit	Practical course on the Spirit-led life and spiritual gifts
	Reading God's Word	Practical guideline to personal study and application of God's word
Discipleship Courses	Didache	In depth study of scripture with a view toward personal transformation and application to context
	Hearing God	Follow-up to Living in the Spirit with a focus on discerning God's leading in life and ministry
	Financial Stewardship	Biblical perspectives on financial management and giving
Equipping for Ministry	Evangelism and Discipleship	Equipping for simple and natural evangelism and discipleship
	Ministry Team Training	Equipping for those who assist the pastoral team in prayer and ministry
	DISC Personality Profile	Understanding and adapting to the behavior of others
	Counselor Training for Teen Holiday Camps	Counselor training for outreach camps for disadvantaged young people
	Prison Ministry	Preparation for prison ministry volunteers and mentors
	Relational Skills	Basic relationship skills course to enhance relationships
	Lay Counseling Skills	Christian counseling basics
	Visiting the Sick	Training for hospital ministry
Need-based Courses	Recovery Dynamics	Recovery from addictive behaviors
	Dating	Building healthy relationships
	Pre-marital Counseling	Marriage preparation
	Refresh Your Marriage	Marriage renewal
	Grief Share	Recovery from loss and trauma
	Growing Kids with Character	Parenting
Leadership Training	Becoming a Better Leader (Business Leadership)	Basics in leadership for business people
	Small Group Leadership	Two-module course on effective small group leadership
	Shepherd's Training	Training for area shepherds in small group supervision and the mentoring of emerging leaders
	Maranatha Theological Training	Two-year program of theological, doctrinal, and practical ministry training. Successful completion earns 118 credits towards a B.Th. degree at South African Theological Seminary
	Progressive Pastor's Training	Advanced training for local and national church leaders
South African Theological Seminary	Advanced Theological Training	Optional training for trainee and full-time pastors

5.4.2 Little Falls Christian Centre

Located in Roodepoort, South Africa, Little Falls Christian Centre is a cell-based church with a Sunday attendance of about 2600. Under the leadership of senior pastor Harold Weitsz, and with input from Dr. Ralph Neighbour Jr., the church transitioned to a cell-based model in the mid-nineties. Over the past fifteen years, the church has grown significantly and planted several other churches. Much of this growth has come through home cells. At present Little Falls has 191 cell groups and 160 prayer cells. Daughter churches have been planted and the entire network has 405 home cells and 292 prayer groups. Cells are facilitated by trained leaders, who are under the supervision and care of a district pastor. The church currently has four geographical districts overseen by six pastoral couples. There are other full-time team members in non-pastoral ministries.

The leadership team of Little Falls places a high priority on authentic worship, the ministry of God's word, the ministry of the Holy Spirit, and quality relationships. With the implementation of home cell strategy in the church, responsibility for pastoral care shifted to the home groups. The pastoral team was then able to focus on equipping people for ministry and building up the body of Christ (LFCC 2011).

Little Falls places great emphasis on the equipping role of gifted leaders as seen in Ephesians 4:11-16. The church also emphasizes the importance of relationships, mutual edification, and the proper functioning of each member of the body. The church's 'body life' plays out primarily in the cell groups. The cell groups of Little Falls have a dual purpose. Cell members not only focus on building up one another, but also on reaching out to the lost and fulfilling the Great Commission (LFCC 2011). Cells provide spiritual protection, edification, acceptance, support, and communication.

According to Pastor Theuns Blom (2012), who oversees the church's training programs, during the five year transition to a successful cell structure, the church went through a consolidation period in which emphasis was placed on the "inward journey", with personal transformation and the establishment of the cell system a central focus. In recent years, however, a stronger emphasis on

authentic discipleship has resulted in a more balanced focus, especially in the area of outreach and planting cell groups.

5.4.2.1 The Equipping Steps Leadership Development Course

With the church's transition to the cell church model and the subsequent numerical growth came the need to train quality cell leaders. According to Blom (2012), this is an important focus in the church. To address this leadership gap, the staff of Little Falls developed a discipleship/equipping track called the *Equipping Steps Leadership Development Course*. Taking participants through a four-stage process that alternates between supervised self-study workbooks and weekend equipping modules, this series seeks "to equip every believer to become an effective worker in the Kingdom of God" (Weitsz 2008a:ix). Essentially, this leadership development course is designed to develop home cell leaders who are spiritually mature, equipped for ministry, and missional in purpose. A tried and tested process, *The Equipping Steps Leadership Development Course* has been adopted by a number of churches around the world. Members who complete this four-stage process are qualified to lead cell groups. Cell leaders or other church members who sense a call to ministry or desire further training are encouraged to enroll in the Discipleship Training Centre, a three-year program designed to equip emerging leaders for full-time ministry (Blom 2012).

According to Blom (2012), the discipleship/leadership development process at Little Falls Christian Centre begins as people join the church, become integrated into a home cell, and participate in the weekend event for new members. This special gathering allows pastors to share the ethos of the church, interact with the people, explain and sign a covenant agreement, and introduce new members to the church's four-step equipping process. At this event, new members receive their first self-study manual, *Welcome to your New Family*. Relationships form an important part of the church's developmental ethos. Cell leaders or sponsors support individuals throughout the entire growth process, even joining them for weekend encounters.

Process 1: *Welcome to Your New Family*

An initial discipleship guide, this workbook focuses on spiritual formation and examines subjects such as salvation, sin, baptism, relationships with God and other believers, growth in God's word, prayer, forgiveness, communion, and the Lordship of Christ. It also includes the church's statement of faith. As members process through the content, they are encouraged to interact with their cell leaders or sponsors. At the end, the cell leader or sponsor meets with the member to discuss outstanding issues, inspect the workbook, and verify that it has been successfully completed. Once the sponsor or cell leader is satisfied, the member is entitled to participate in the first weekend encounter.

Encounter 1: Spiritual Formation

Following on from *Welcome to Your New Family*, the focus of Encounter 1 is spiritual formation. After a time of prayer, worship, and a brief introduction, participants are taught about life in the Holy Spirit, praise and worship, faith, stewardship, and sanctification. The presentation method is primarily lecture. Time is also spent praying for those who wish to be filled with the Holy Spirit. At the end of the day's training, participants are given the self-study workbook for process 2, *Spiritual Victory*.

Process 2: *Spiritual Victory*

This *Spiritual Victory* self-study workbook takes the learner on a journey toward spiritual victory, encouraging and guiding believers to identify, deal with, and overcome areas of sin and deception in their lives, surrendering themselves fully to the Lordship of Jesus. Topics include the triune nature of humankind, identifying and dealing with strongholds and spiritual 'baggage', the renewing of the mind, the transformational role of the Holy Spirit (together with God's word and prayer), the adoption of a Kingdom-based worldview, and the believer's role in the body of Christ. Believers are encouraged to engage with their sponsors or cell leaders as they process through the sections of this workbook.

Encounter 2: Spiritual Victory

The two-day Spiritual Victory encounter endeavors to help believers become established in spiritual truth and attain ongoing victory in their lives. Participants learn about the nature and gifts of the Holy Spirit, authority in Christ, the tactics of Satan, spiritual warfare, breaking spiritual strongholds, healing for the whole person (spirit, soul, and body), the ministry purpose of the Church, and walking in spiritual victory. Time is also devoted to identifying problem areas in people's lives and ministry to those who want to be set free.

Process 3: *Reaching the Lost*

Inspired by the perspectives of Dr. Ralph Neighbour Jr., this practical workbook teaches believers how to lead the lost to Christ. It discusses various types of evangelism, outreach along lines of relationship, the value of personal testimony, and God's plan of salvation. This workbook is completed under the supervision of a sponsor or cell leader

Encounter 3: Evangelism

The purpose of the evangelism encounter is to equip believers to lead people to Christ. During the encounter, participants study the Great Commission, God's perspective on the 'lost', different types of unbelievers, and God's plan of salvation. Attention is given to handling difficult situations, practical guidelines for sharing the gospel in various situations, and the value of 'interest' groups for developing opportunities to reach out to others.

Process 4: *Developing Your Leadership Potential*

Weitsz (2008b:15-17) introduced this workbook by explaining that Jesus called people to be disciples who would become like him and reproduce. The opening section challenges participants to consider accepting the responsibility to plant a new home cell. A strong emphasis is placed on biblical discipleship and the importance of raising up the next generation of leaders. After covering both biblical and church-based qualifications for leadership and encouraging participants to be lifelong learners, the workbook provides biblical and practical

insights on leadership in the body of Christ. Like the other workbooks, this one is completed under the supervision of a sponsor or home cell leader.

Encounter 4: Champions (Cell Leader Training)

The Champions encounter has one central purpose — cell leader training. This weekend event focuses on the home cell life cycle, the role of the cell leader, prayer, effective facilitation, preparation, the elements of a cell meeting, developing interns, and the importance of administration (keeping records). The Champions encounter ends with the laying on of hands by the church elders. Participants are encouraged to pioneer new cell groups.

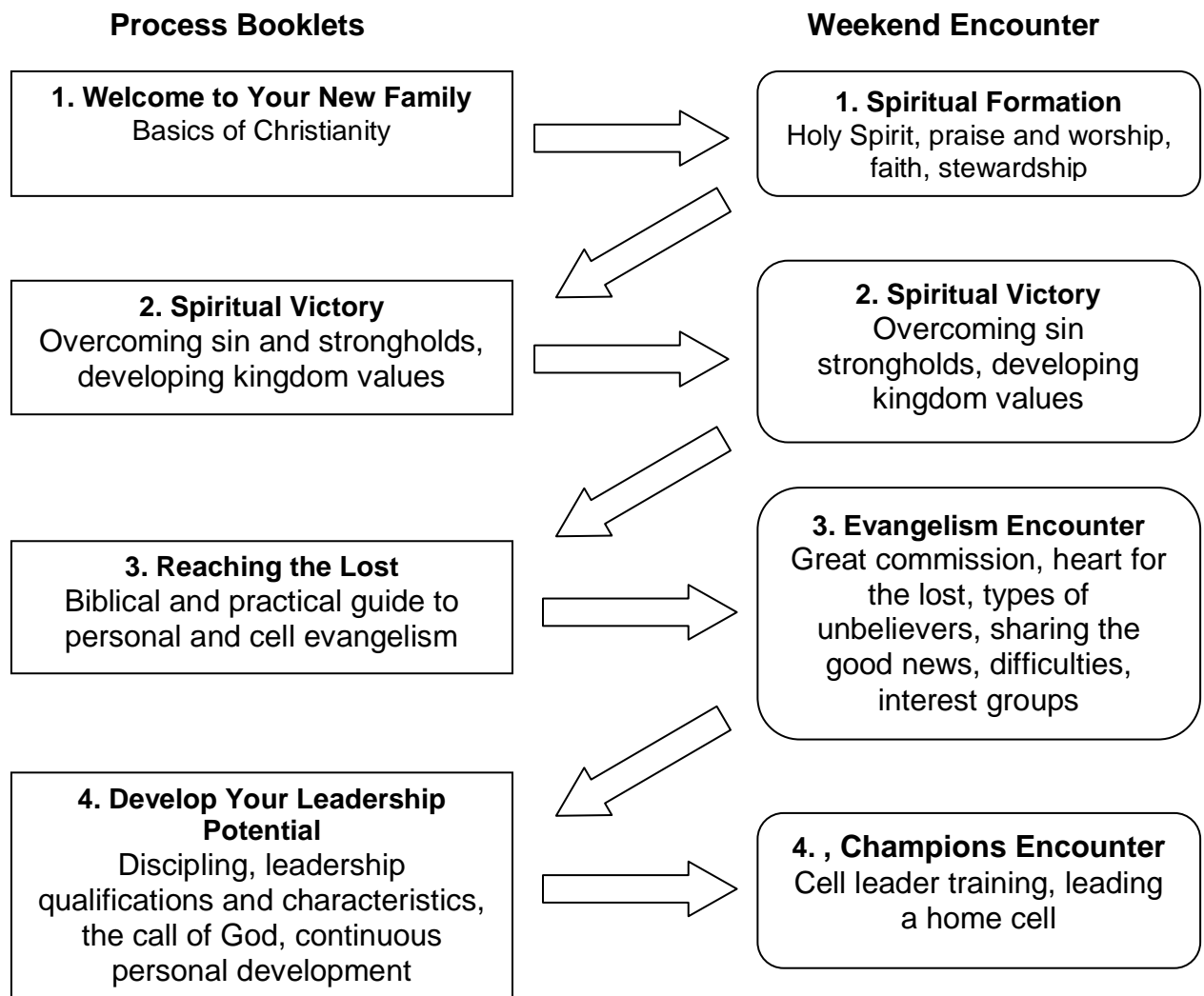
5.4.2.2 Ongoing Training

Little Falls facilitates ongoing training for cell leaders. New cell leaders receive a resource manual called *The DNA of a Healthy Home Cell*. This manual is a practical, universally applicable, and upgradable resource manual for cell leadership. Sections address relationship with God, building a leadership team, conducting life-changing cell meetings, shepherding cell members, and expanding the ministry.

Lifelong learning is part of the ethos of Little Falls. All church leaders gather four times a year for Continuous Personal Development (CPD). Relational, developmental, motivational, and correctional in nature, CPD enables senior leaders to share vision, encourage the wider leadership team, and address areas of needed improvement in the ministry of the church.

Noted cell church specialist Joel Comiskey (2000) commended the exemplary equipping system developed by Little Falls.

Their first level is clear, concise, and trains new believers rapidly to enter cell leadership. In 1999, 970 passed through this first level and were able to eliminate the cell leader shortage in their church. LFCC also has a second level of training for those who are leading a cell group. The second level provides added Biblical and spiritual nourishment for those most needing it — the front-line soldiers.

Figure 5.13: Little Falls *Leadership Development Course* Flowchart

5.4.2.3 The Discipleship Training Centre

In addition to the previously mentioned training courses, the church's 'Discipleship Training Centre' offers an intense three-year program designed to prepare people for full-time ministry (Blom 2012). The centre features three important learning facets: academic coursework, in-service learning, and student-driven projects that enhance ministry and leadership skills. Classes are held two nights a week. Though classes are primarily lecture-based, participants engage in group discussions, learning projects, ministry assignments, and self-assessments. Assessment of students is based on competencies rather than 'grades'.

Table 5.3: 2012 Curriculum of the LFCC Discipleship Training Centre

First Year	Second Year	Third Year
Bible Doctrines – Bibliology	Angels and Demons	Beginnings
Cell Church Principles	Bible Doctrines – Christology	Church Planting
Charismatic Ministry	Bible Doctrines – Theology	Competent Communication 1
Developing Disciples	Church History	Competent Communication 2
Principles of Faith	Divine Destiny	Competent Communication 3
Principles of Prayer	Foundations of Leadership	Discipline in the Church
Romans Verse by Verse	Healing and Deliverance	Discovering Gifts and Calling
Spiritual Disciplines	Missions and Evangelism	Introduction to Greek and Hebrew
Submission and Authority	Synopsis of the Gospels	Ministry in Practice
The Blood Covenant	The Book of Ephesians	Pastoral Tasks
The Book of 1 John	The Book of Galatians	Principles of Church Growth
The Character of Jesus	The Book of Hebrews	The Call of God
The Fruit of the Spirit	The Life and Journeys of Paul	The Early Church
The Gifts of the Spirit	The New Testament Church	The man of God
The Holy Spirit	The Old Testament	The Ministry Offices
The Tabernacle of David	Truth and Error	The Role of the Pastor's Wife

The DTC is characterized by a strong emphasis on prayer, relationships, community, and mutual accountability (Blom 2012). These, along with open and often deep relationships between teachers/lecturers and students, provide excellent long-term motivation for the students. In addition, there is a symbiotic relationship between the church and the DTC, with the vitality of the cells and young people's ministries influencing the DTC students, and the students affecting these ministries. According to Blom (2012), about two-thirds of students who complete the Discipleship Training Centre program end up in full-time ministry, many within the church network.

5.4.2.4 *The Developmental Path*

Like many cell churches, Little Falls has been successful in growing its own leaders. According to Blom (2012), the developmental path for emerging leader's entails successful completion of *Equipping Steps Leadership Development Course*, becoming a cell intern, leading a new or existing cell, demonstrating a calling to ministry, successfully completing the three-year program of the Discipleship Training Centre, becoming involved in higher level ministry, and, as the opportunity arises, being recognized and appointed as a district pastor overseeing a geographical area. Potential candidates for pastoral ministry are assessed not only on their sense of calling and competency, but also on their understanding of and commitment to the church vision. In addition, church leaders look for a collaborative spirit, loyalty, and a heart to serve. Blom (2012) noted that the church leadership also recognizes and endorses other ministry callings and regularly assists emerging leaders as they plant churches, engage in evangelism, or pursue other ministries.

5.5 Selected Insights from Organizational Research

Clinton's developmental model, the models and strategies of BILD International, the Centers of Church-based Training, and LeaderSource SGA, and South African church models all provide helpful insight for church leaders seeking to design and implement leadership development initiatives. However, this research project would be remiss if it did not also consider certain models and strategies highlighted through organizational research.

In the past twenty years, there has been a plethora of material on leadership development in the business and nonprofit sectors. While many books and articles seek to advance specific programs or approaches, certain researchers and practitioners have sought to identify the underlying values and principles that contribute toward success in leadership development initiatives. This section focuses on the research-based '70-20-10 rule' advocated by the Center for Creative Leadership, contributions from Jay Conger and his colleagues, and the leadership development principles advanced by Byrne and Rees (2006).

In common with the church around the world, there is both a shortage and demand for capable leaders at all levels in global organizations. With the demand and need so great, strategies to prepare today's emerging leaders for future leadership roles must be carefully researched and crafted (Wilson, Van Velsor, Chandrasekar, and Criswell 2011:2).

5.5.1 The 70-20-10 Guideline

Findings from research by Regent University's Center for Creative Leadership indicate that merely conducting leadership courses and 'training' is not enough to promote the development of top leaders.

Coursework and training are not enough. Organizations must create systems and processes that enable managers to learn leadership from experience. They must provide them with a clear sense of what needs to be learned, surround them with people who support their efforts to develop themselves, and promote effective developmental practices, such as reflection, dialogue, intentional goal setting, and feedback (Wilson et al. 2011:2).

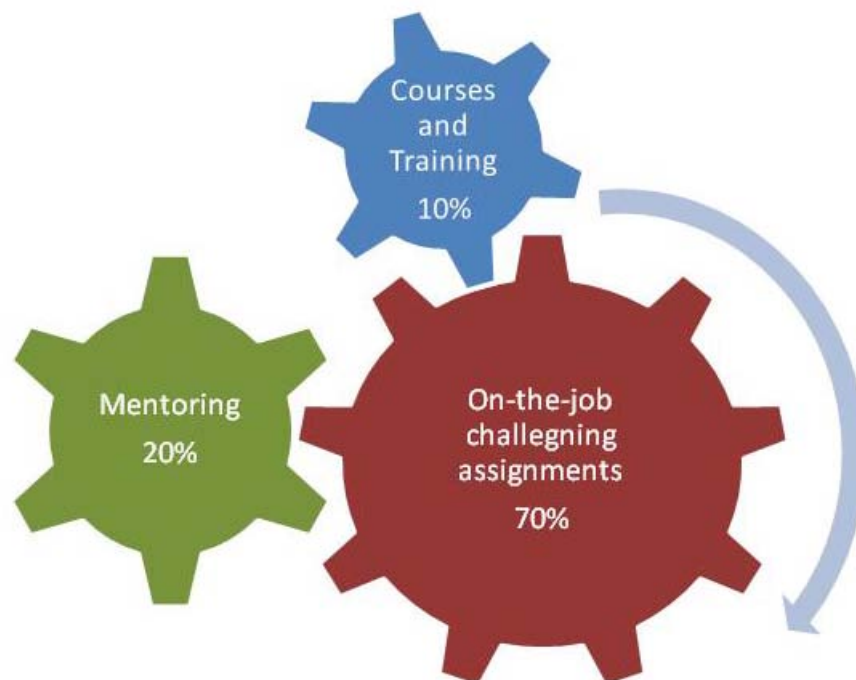
Significantly, research shows that a number of important leadership skills are learned not through coursework, but through in-service experiences. This has important implications for the design of church-based leadership development initiatives. To maximize learning, organizations need to design and implement systems and processes that capitalize on experiential learning processes and assist emerging leaders to learn more effectively from their experiences. Before this can be done, organizations must identify and understand the types of experiences that facilitate development of the leadership attitudes and skills required in the specific context and culture (Wilson et al. 2011:3). However, even this is not enough. For in-service learning to be of maximum effect, learning experiences must be part of the 'big picture'. Organizations need a leadership development strategy that aligns closely with organizational strategy. Only when there is alignment between the organizational strategy and the development strategy can organizational leaders identify developmental experiences and lessons of importance to the organization. More importantly, this whole process

must be driven and supported by top leadership (Wilson et al. 2011:3). Without the direct involvement of executive leadership, most developmental efforts are relatively ineffective.

Achieving the correct balance in learning experiences is important for leadership development. Thirty years of research by the Center for Creative Leadership have identified the factors that help leaders learn, grow, and change as they mature in leadership. Though well-designed courses most certainly have their place, especially in the laying of foundations, research indicates that top leaders learn best through challenging job assignments (70%), followed by developmental relationships (20%), and finally coursework and training (10%) (Wilson et al. 2011:4).

Figure 5.14 The 70-20-10 Rule for Effective Leadership Development

(adapted from Wilson et al. 2011:4 and McCall 2009)



Even though the 70-20-10 rule is widely recognized, most organizations are still “not systematic or intentional about using a synergistic combination of assignments-relationships-coursework to groom future leaders” (Wilson et al. 2011:4). Instead, leadership development is too often left to chance or a poorly conceived hodgepodge of classes and experiences. According to McCall and

Hollenbeck (2002:12), although “classrooms and programs can be essential contexts for executive learning”, they cannot be the primary development tool. As the research clearly indicates, job assignments are the primary drivers of development (McCall and Hollenbeck 2002:12). Van Velsor, Moxley, and Bunker (2004:208) noted that the leaders who enjoy long-term success are those “who can learn from their experiences and use that learning to develop a wider range of skills and perspectives so that they can adapt as change occurs and be effective in a wider range of situations”.

Unfortunately, the 70-20-10 rule does not provide sufficient guidance on the kinds of experiences that contribute to learning and growth; and this makes the selection and sequencing of developmental assignments difficult. Moreover, because the rule does not detail how experiences and the leadership lessons are linked, organizations find it difficult to match the learning needs of developing leaders to experiences that are likely to engender required learning (Wilson et al. 2011:4).

Interestingly, in spite of the relatively low level of influence attributed to coursework and training, the Center for Creative Leadership maintains that “well-designed coursework and training have an amplifier effect on leader development” (Wilson et al. 2011:6). Two factors enhance the impact of courses — effective design and implementation and integration with other learning experiences. The nature and quality of the learning processes utilized in courses profoundly influence their effectiveness. But, more importantly, courses intentionally linked to real time on-the-job learning combined with mentoring in an integrated developmental approach show the greatest amount of fruit (McCall 2009:2-3).

5.5.2 Experiences that Contribute to Leader Development

Research by Conger and Ready (2004), McCall (2004), and McCauley (2001) indicated that the future competence of developing executive leaders is significantly influenced by the types of developmental experiences and learning opportunities to which they are exposed. Research gathered in China, Singapore, India, and the United States between 2005 and 2011 identified the five most

common types of learning experiences that contribute to leadership development. These experiences involve bosses and superiors, turnarounds, increases in scope, horizontal moves, and new initiatives (Wilson et al. 2011:5). In addition, other experiences, such as mistakes, crossing cultures, stakeholder engagements (negotiating solutions from competing perspectives), and crises and ethical dilemmas, were unique to particular countries. McCall (2009:2) cited a number of studies in which successful organizational leaders attributed much of their development to

early work experiences, short-term assignments, major line assignments, other people (almost always very good and very bad bosses or superiors), hardships of various kinds, and some miscellaneous events like training programs.

Bosses and superiors play the most influential roles in the development of leaders (Wilson et al. 2011:6). Interviewees described five prominent roles bosses play: positive role models, teachers, catalysts, mentors, and negative role models that have a positive impact (Wilson et al. 2011:7). These research findings clearly indicate how important it is for leaders to be aware of their influence on others. How top leaders manage, motivate, develop, and inspire those under their leadership profoundly influences not only those with whom they have direct contact but also the entire organization (Wilson et al. 2011:6-7). As one might expect, researchers also found that culture plays a major role in what superiors and subordinates expect from each other.

Other developmental experiences are also important. Chinese leaders, in particular highlighted 'turnarounds' as extremely beneficial. Turnarounds rectify an underperforming or failing operation and may involve restoration of profitability, organizational restructuring, and culture change (Wilson et al. 2011:7,9). Increases in job responsibilities, transfers to new positions, and participation in new ventures also prove to be valuable stretching experiences (Wilson et al. 2011:9-10).

Three specific leadership lessons proved to bring about the greatest development in capability: managing direct reports, becoming self-aware, and executing effectively (Wilson et al. 2011:16-17). Managing direct reports refers to the

supervision of staff and involves tasks such as delegation, follow-up, and developing and motivating people with diverse needs or responsibilities. Self-awareness tends to increase when a person reflects on new challenges or receives meaningful feedback or assistance from a coach, mentor, or peer. Effective execution is learned from managing relationships and resources and by observing superiors.

CCL research provides sobering perspective for organizations looking for a quick fix. Research has confirmed that “no single developmental event, no matter how powerful, is enough to create lasting change in an individual’s approach to the tasks of leadership” (Van Velsor et al. 2004:205). The development of leaders is a lifelong process. For leaders to become successful, individuals need a “variety of developmental experiences over time”, an ability to learn from such experiences, an organizational environment in which there is alignment between leadership development and organizational systems, and willing support for individual development (Van Velsor et al. 2004:205).

CCL strongly recommends that organizations become intentional about grooming new leaders, “creating systems and processes that help managers learn leadership from workplace and personal experiences” (Wilson et al. 2011:21). To assist organizations with leadership development strategies, Wilson et al. (2011:21) compiled a list of reflective questions for senior leaders. An adapted version of this list is below.

To develop a leadership strategy that complements organizational strategy:

- What are the three leadership capabilities your future top leaders are most encouraged to develop?
- How would the development of these three capabilities advance your organization’s objectives?

To identify experiences and learned lessons:

- What are the specific events or experiences used to impart leadership insights?

- Has your organization identified vital experiences or work assignments that can develop critically necessary capabilities? If so, what are they?
- How willing are the leaders in your organization to reflect on and tell stories about what they have learned about leadership through experience?

To support learning and growth among future top leaders:

- In what ways are emerging leaders encouraged to practice and improve their leadership effectiveness?
- What processes are used to encourage learning from personal experiences, mistakes, crises, or ethical dilemmas?
- To what extent are senior leaders willing to become mentors and/or coaches?
- To what extent do leaders have the skills to mentor or coach?
- Are there barriers that impede reflection on experiences and lessons learned?

5.5.3 Leadership Development Pathologies in Organizations

In spite of the corporate world's \$50 billion annual expenditure on leadership development programs, the overwhelming majority of such efforts are relatively unsuccessful (Conger and Ready 2003:1). Conger and Ready (2003:2) identified three 'pathologies' (causes and effects of systemic problems) as primary contributors to leadership development failures.

In our fast-changing world, the nature of organizations is changing and new leadership paradigms have emerged. One of the pathologies that contributes to a dysfunctional leadership development process is the old 'ownership is power' mindset. When executive leaders maintain a mindset focusing on control, ownership, and power rather than understanding and embracing the need for shared accountability, leadership development suffers badly (Conger and Ready 2003:2).

Another pathological problem is the failure to align leadership development efforts with strategic goals (Conger and Ready 2003:6). Organizations often recognize leadership problems but seek 'quick fixes' through commercial products and courses that have limited relevance to their actual needs. Instead of seeking to resolve issues through prepackaged courses, executive leaders need to identify problem areas and then act to bring leadership development processes in line with the organization's strategic goals.

The third major pathology involves the use of 'make believe metrics' to assess leadership development efforts (Conger and Ready 2003:8-9). Assessments that ask the wrong questions are of little value to the organization, especially if they give an illusion of success while failing to assess the true effectiveness of leadership development processes.

Conger and Benjamin (1999:1-26) suggested that organizations themselves control many of the forces that enhance or hinder the development of leaders. Organizations occasionally show little authentic commitment to leadership development and often fail in their development efforts due to poor design, inadequate support systems, low levels of commitment, and a lack of follow-through. Effective leadership development requires system-wide commitment to change in an organization.

However, there is more to leadership development than effective organizational programming. The potential/emerging leader plays a major role in his or her own growth. Though many people possess leadership ability, not all choose to exercise and develop it (Conger and Benjamin 1999:12). For those who seek to grow in leadership ability, it is not long before they discover that this is a lifelong process. As the authors are careful to note, many years are required to produce an exceptional leader. This is especially true in the Body of Christ.

5.5.4 The Primary Roles of Leadership Development in Organizations

According to Conger and Benjamin (1999:21), leadership education and development programs have three primary roles within organizations: individual skill development, socialization of organizational leadership values and vision

(among leaders at all levels), and strategic intervention that promotes dialogue and facilitates organizational change. Historically, primary emphasis has been placed on individual skill development. However, in an effort to influence the organization as a whole, organizational leaders are placing a greater priority on 'socializing' vision, mission, and values among those involved in leadership (Conger and Benjamin 1999:22). This is especially valuable for those who are responsible to inculcate corporate vision and values among the employees or the broader team they supervise. Leadership programs are also being increasingly used for strategic interventions that facilitate and accelerate strategic change within organizations (Conger and Benjamin 1999:22). Such programs rely heavily on task forces, think tanks, action learning, and facilitated group discussions, building leadership capabilities and creating a shared sense of accountability to help implement new strategic mandates.

5.5.4.1 Making Individual Development Programs Effective

A number of factors contribute to the success or failure of training programs. To be effective, individual development programs need to be built around a single, well-delineated leadership model, appropriately defined for each leadership level. (Conger and Benjamin 1999:33). Needs at every level are not the same, so it is important to identify clearly what is most important at each level, and who should participate. For the development program to accomplish its purpose, there must be a clear understanding of who it is for and what it is to accomplish (Conger and Benjamin 1999:35).

The effectiveness of developmental programs is enhanced when participants engage in advanced preparation (Conger and Benjamin 1999:37-38). Insightful reflective exercises done beforehand create a greater openness to learning and change.

Openness to change is also reinforced by 360-degree feedback. Done correctly, and in conjunction with self-assessment exercises, feedback mechanisms are quite motivational and tend to facilitate the kind of openness required for meaningful growth (Conger and Benjamin 1999:38-42).

Learning methods also play an important role in the success of developmental programs. Consideration should be given to the inclusion of processes that combine and balance conceptual awareness, feedback, skill building, and holistic personal growth (Conger and Benjamin 1999:42--51), all in line with adult learning principles previously described in chapter three. One of the greatest deficiencies in individual development programs is that they rarely give participants the opportunity to experiment in an authentic context with new thinking and behavior that might resolve issues in leadership competence. The lack of application to context and failure to link learning to job experience minimizes the likelihood of long-term change (Conger and Benjamin 1999:68). This is also true of approaches that are not reflective or holistic in nature.

Another challenge confronting many individual development programs is time. Meaningful growth and change occur over time. Transfer of learning tends to be far more effective when active learning occurs over an extended period and in conjunction with multiple experiences (Conger and Benjamin 1999:52-53).

Finally, developmental efforts are generally unsuccessful if organizational support systems are not in place (Conger and Benjamin 1999:54). As one might expect, research indicates that the single most important factor in the transfer of training back to the job is the attitudes and actions of immediate supervisors (Conger and Benjamin 1999:54).

5.5.4.2 Socializing Vision and Values

A major responsibility of organizational leaders is defining and communicating organizational vision and values. Because they so profoundly influence the culture and direction of the organization, it is vital that vision and values are understood, embraced, and embodied by emerging leaders (Conger and Benjamin 1999:79). Recognizing this need, many organizations are increasing efforts to build a shared understanding of their key objectives and to enhance commitment to vision and values at all levels of leadership.

Though organizations endeavor to socialize vision and values in a number of ways, research has identified specific design features that amplify the

effectiveness of socialization processes (Conger and Benjamin 1999:89-112). One of the most telling factors is who participates in the socialization process. Wise selection increases the likelihood that participants will embrace and promote the same values as executive leadership, benefitting the organization. Moreover, selection of those who exhibit the desired attitudes and values conveys to organizational members that these are important and will be rewarded. It also demonstrates to emerging leaders the quality of work that is expected and the type of example they are to set (Conger and Benjamin 1999:90).

In order for effective socialization to occur, there must be a broad understanding of the vision of the organization. Research by Conger and Benjamin (1999:96) ascertained that effective leadership programs invest a significant amount of time and effort assessing the organization's leadership needs. A thorough assessment considers the organization and its strategic goals, what leaders are expected to accomplish, and "the extent to which leaders across a firm actually demonstrate values, attributes, and behavior consistent with the corporate vision" (Conger and Benjamin 1999:96-97). A needs analysis that requires existing leaders to explain their understanding of the organization's strategic challenges and the competencies needed to address them yields a more effective socialization of leaders (Conger and Benjamin 1999:98).

As one might expect, programs cannot be effective at socializing vision, values, and philosophy if the organization itself is unsure about these key perspectives (Conger and Benjamin 1998:98). Even when these are clear, who communicates them has a direct bearing on effectiveness. Organizations are learning that their own executive leaders are often the most effective at imparting a sense of vision and values. This is one of the many areas in which experienced senior leaders are best at developing other leaders (Conger and Benjamin 1999:100-101).

How vision and values are communicated is important. Both systemic and small group factors influence effectiveness. Socialization depends on "continual, progressive, and sequential development" (Conger and Benjamin 1999:107-108). Programmed efforts should be designed to facilitate meaningful interaction among participants. Dialogue among leaders at various levels clarifies

expectations regarding the roles and responsibilities of emerging leaders. However, a good educational approach is not enough. Organizational systems must also be aligned to reinforce the desired values. Part of this alignment is assessment. Effective socialization processes endeavor to assess the extent to which organizational leaders align with vision and values as a result of developmental initiatives (Conger and Benjamin 1999:110).

5.5.4.3 Strategic Leadership Initiatives

With change becoming the one constant, and a constant need for adaptation, organizations are increasingly seeing the value of strategic leadership initiatives for influential leaders (Conger and Benjamin 1999:146). Using a customized, learner centered approach integrated with the organization's strategic agenda, these initiatives facilitate worldview shifts in leaders and help the organization to realign strategically (Conger and Benjamin 1999:149). According to Conger and Benjamin (1999:158-183), a number of specific design elements characterize successful programs, the most important of which is a "clearly articulated framework" that guides the organization's efforts. When the strategic agenda is well-crafted, and the event is structured around learning objectives for executive leaders, programs go a long way toward enhancing a shared understanding of organizational objectives and accelerating desired change. To be effective, strategic interventions should be preceded by an honest assessment of learning needs. This information can then be used to inform the design of the intervention. To enhance learning, the curricula must be designed to "elicit collective dialogue" across functions and among various leadership levels (Conger and Benjamin 1999:170). Because collective dialogue contributes to the determination of how vision and strategy should unfold, it tends to enable a more successful transition. The use of trained facilitators helps to focus interaction and elicit helpful responses. Also important to the process is active feedback between program participants and executive leaders, who tend to serve both as 'drivers' and role models in the process. Feedback mechanisms make it possible to track progress, stay on course, and maintain credibility.

5.5.5 Guiding Principles for Leadership Development in Organizations

Though many organizations have launched initiatives to develop their own leaders, too few have made the effort to lay the groundwork necessary to design effective processes. When the need for new leaders suddenly becomes apparent, organizational leaders often grasp at straws and become excited about an external course or a promising new program. A course or series of courses is hastily thrown together in the hope that somehow, at the end of the process, healthy leaders will emerge. While such efforts may be of some benefit, rarely do they produce the expected results. An approach of this nature is akin to building a skyscraper without laying a foundation or drawing up well-conceived building plans.

As experienced practitioners Jo-Ann Byrne and Richard Rees (2006:14-27) suggested, the design of a successful leadership development program begins with the key principles that will undergird and provide structure for the program. Failure to clarify a strong set of principles often causes programs to lose direction and eventually fail. In order to be of value to the organization, leadership development programs must align with the organization's mission, vision, goals, and strategic initiatives (Byrne and Rees 2006:15); and part of the organization's vision and strategy should involve the development of leaders. Alignment, however, is not enough. If leadership development programs are to enjoy long-term success and contribute toward the creation of an authentic learning and leadership culture, then they must enjoy the full support of the organization and its leaders (Byrne and Rees 2006:27).

Leader development programs with fuzzy goals and muddled methods rarely work. Programs are most effective when the purpose is clear and the learning methodologies are appropriate. Byrne and Rees (2006:18-19) stressed the importance of identifying the leadership competencies that the organization wants to develop, with a particular focus on the actual skills, talents, and abilities the organization sees as valuable and essential for its success. As much as possible, leadership development programs should be outcome-based and measurable,

enabling senior leaders to ascertain if there is a suitable return on the time, effort, and money invested in the program (Byrne and Rees 2006:17).⁵⁷

The learning methodologies employed in leadership initiatives should recognize the principles of adult learning (Byrne and Rees 2006:19).⁵⁸ Adults learn best through experiences and problem solving, and when learning is of immediate practical value. Participants, however, need to accept responsibility for their own learning. Since competence does not develop in a classroom, ample opportunities must be given for emerging leaders to develop competence through real life experiences, job assignments, and personal engagement with other leaders and superiors in organizational initiatives, strategic planning, work projects, and other developmental activities. Designers of leadership development programs must recognize that leaders are at different levels and have different needs. Multi-level planning, diagnostic measures, and individualized learning options help personalize the learning process.

5.5.6 Competencies versus Competence in Leadership Development

Many of today's leadership development initiatives utilize a framework of leadership capabilities called a competency model.⁵⁹ Often based on behavioral factors, competency models generally form the basis for leadership development and assessment in organizations. According to Boyatzis (1982:80), a competency is "an underlying characteristic of a person — a motive, trait, skill, aspect of one's self image or social role, or a body of knowledge which he or she uses." Though there are advantages to competency models, most organizations are unaware of the shortcomings (Conger and Ready 2004:1).

⁵⁷ Chapter two details a number of helpful instructional design models that facilitate the development of leadership development processes that incorporate these criteria.

⁵⁸ Chapter three examines a number of helpful theories and models of adult learning. In addition, the reader is advised to review section 2.3.9.1 on Vella's twelve principles of effective learning.

⁵⁹ According to Sweeney-Platt (2001), a survey at the U.S. Leadership Development Conference in 2001 indicated that seventy-five percent of American companies use competency models in their leadership development.

Competency models are popular for a good reason. As Conger and Ready (2004:4) noted, they offer three important benefits. These frameworks help both organizations and aspiring leaders by defining the behaviors, capabilities, mindsets, and values important for those in leadership. They also provide consistency for the organization by establishing a single leadership/management model and a common frame of reference for discussions relating to the communication and implementation of leadership development strategies. In addition, the competency framework provides connectivity among human resources processes such as performance management, feedback processes, identification of potential, succession management, and reward schemes.

Though competency models have wonderful advantages, they can also pose problems for organizations (Conger and Ready 2004:7-10). Perhaps the most disabling characteristic is the tendency of organizations to include too many competencies, making administration of the model simply too complex to be useful.⁶⁰ Related to this, organizations tend to create a uniform set of competencies by which all leaders at all levels are assessed. However, this completely ignores reality. Different leadership positions require different competencies. Perhaps the greatest ‘misbelief’ lies in the assumption that “an effective leader is the sum of a set of competencies” (Conger and Ready 2004:9). Faulty in its logic, this concept asserts that if a leader develops each competency to the point of mastery, he or she will be a successful leader. Leadership is far too complex to be adequately described by a set of behavioral competencies. Conger and Riggio (2007:104) argued that leader development programs must concentrate on the development of authentic competence to handle leadership challenges and on the kinds of experiences that develop such competence. A focus on measuring and training for a ‘laundry list’ of competencies is missing the mark.

Organizations should focus on competence, not competencies, and should aim their efforts at producing leaders who will be able to

⁶⁰ More simplified approaches such as the CCBT ‘head, heart, hands’ model (Figure 5.3) and Webber’s 5C model (Figure 5.8) may be more appropriate for a church-based context.

meet the strategic challenges ahead. The strategic challenges of the organization ... dictate the development challenges for future leaders (Conger and Riggio 2007:104).

Concurring, McCall and Hollenbeck (2002) suggested that many organizations have embraced the wrong focus. Rather than fixating on a set of behavioral competencies, organizations need to concentrate their developmental focus on the organization's 'strategic demands' as defined by senior leaders, determining leadership needs on the basis of the organization's strategic objectives. Indeed, "development must begin with a clear focus on business need and on experience as the driving force" (McCall and Hollenbeck 2002:21). Motivated by senior leaders who understand the organization's strategic goals, learning experiences that promote the critical development emerging leaders need must be identified, designed, and provided.

McCall and Hollenbeck (2002:27) warned that it is not enough for senior leaders to offer mere 'support' for the process. They must lead it (in much the same way the Lord Jesus and the apostle Paul did in the New Testament)! When top leaders do not believe that development is important, even the most sophisticated developmental tools will be of little long-term value to the organization.

As Conger and Riggio (2007:105) noted, the only meaningful reason to invest so much in the development of leaders is to enable the organization to achieve its objectives. As such, the leadership challenges created by the organizational strategy are the primary determinants in deciding what types of learning experiences emerging leaders need to develop competence. Moreover, the only viable way to assure that emerging leaders gain the experiences they need is to build them into the strategy itself.

5.6 Conclusion

In the effort to identify a set of recommended practices for the design of transformational leadership development processes in the South African church, it is important to glean from the models, strategies, and insights of others. Since

ministry flows out of 'being', out of who we are and not just what we know or do, Clinton (1984, 1988, 1989, 2006) highlighted the importance of building leadership development processes that are holistic in nature, emphasizing not only the acquisition of knowledge and the development of skills, but, even more importantly, the formation of Christlikeness in the leader's inner person.

Reed (2001) suggested that biblical leadership development occurs best in the context of the church. He founded BILD International (2010, 2011, 2012a) to assist local churches to train their own leaders using quality courses taught by gifted church leaders in the context of biblical community and mission. Committed to "the way of Christ and his apostles", and recognizing the value of serious ordered learning and the cultural leverage afforded by accreditation, BILD founded the Antioch School of Church Planting and Leadership Development (Antioch School 2012) to strengthen the American church and to motivate churches to embrace once again the biblical mandates for leadership development and church planting.

Rising to the challenge, the Centers for Church-based Training (CCBT 2011) developed a well-conceived, biblically sound church-based leadership training process driven by an effective learning methodology (Miller 2010b). Combined with experiential learning in the community of believers and the input of mentors, CCBT's (2010) *Leadership Series* offers churches a solid process of leadership development. Rather than providing church-based training courses, LeaderSource SGA (2011) has sought to equip churches and church networks with the perspectives and tools needed to develop their own contextually appropriate church-based processes for the development of healthy spiritual leaders. In designing leader development processes, Webber (2008a) emphasized the need for a clear definition of a healthy spiritual leader (the developmental goal), the use of a holistic process, and the creation of a transformational context.

All of these models share common traits. Each sees the local church as the ideal and, indeed, biblically-mandated community for the development of Christian leaders. Each specifies the importance of defining the type of leader to be developed. A mature, well-equipped, spiritually healthy leader is the desired

outcome. Rather than relying primarily on classroom instruction, these models utilize an integrated, balanced approach to learning. Adult learning methodologies, in-service learning, learning in community, and mentoring all play a vital role. Unlike the traditional schooling paradigm, these models emphasize and facilitate holistic, transformational development in the context of Christian community and ministry. Spiritual formation is a central theme, Christlikeness is the principle goal, and mission is the result.

The two South African churches featured in this chapter have created leadership emergence models with a clear developmental pathway. Though both models rely heavily on lecture-based cognitive input, Little Falls has developed a well-sequenced learning process and Maranatha an integrated developmental process of courses, in-service learning, and mentoring. Leaders at both churches readily confess the need for continual improvement in their leadership development processes. Nonetheless, since the entire pastoral team at both churches is homegrown, their proprietary models are certainly bearing fruit.

In keeping with insights gleaned from the review of adult learning theories and models in chapter three, a number of the leader development models featured in this chapter recognize the importance of learning from experience. Research by the Center for Creative Leadership (Van Velsor et al. 2004, McCauley and Van Velsor 2004, and Wilson et al. 2011) highlights the central role that experience plays in leadership development. In particular, working with supervisors, supervising others, and challenging assignments all facilitate the development of leadership skills.

For church-based leader development efforts to be successful, church leaders must do more than throw together a few courses. As Conger and Ready (2003:6) emphasized, church leaders must have a clear understanding of their church's leadership needs and create alignment between the organization's vision and values and the leadership development process. Since the future of the organization is tied to the development of emerging leaders, senior leaders must not only support the leadership development process, they must 'own' it (McCall and Hollenbeck 2002). In agreement with most instructional design models, Byrne and Rees (2006) emphasized that the design of any leadership

development effort must begin with a determination of the key principles that will undergird and provide structure for the program. In addition to aligning with organizational vision and goals, the initiative's developmental objectives must be clear, the methodologies appropriate, the design well-conceived, and the process well-supported.

Conger and Riggio (2007:105) recognized that leader development is not an end in itself. Leaders are developed to enable the organization to fulfill its purpose. Even so, in the body of Christ, leaders are not developed to fill church positions. God grows leaders to fulfill his missional purposes; and he gives churches the privilege of being part of what he is doing!

Chapter Six

Recommended Design Practices in Church-based Leadership Development

Introduction 6.1

The rising popularity of leader-intensive ministry models such as the cell church and the challenges associated with Bible college or seminary training have motivated many churches in South Africa to experiment with church-based approaches to leader development. Since small group ministry models are dependent upon effective leadership at multiple levels, many churches are investing considerable time, effort, and resources into the training of ministry leaders. Some churches have designed or compiled their own proprietary processes of leadership development⁶¹, while others have chosen to make use of existing courses and/or curricula provided by tertiary institutions, mega-churches, and online ministries.

Reflecting the pervasive influence of modern educational paradigms, churches often use content-heavy, teacher-centered training programs rooted in a cognitive

⁶¹ Two South African examples, Maranatha Community Church and Little Falls Christian Centre, are examined in section 5.4.

learning paradigm. While these courses convey an abundance of information, few result in transformational leadership development. As Webber (2008b) noted,

If our purpose was merely to get the right information into the heads of our emerging leaders, then lectures followed by papers and small group sessions to discuss the information ... would be sufficient. But if our goal is the building of the whole person, then a much more complex process is necessary — we need a transformational collage of spiritual, relational, and experiential as well as instructional dynamics.

In spite of the challenges, Forman et al (2004:25) firmly believe that local churches have the God-given capacity and responsibility to engage in ‘whole-life’ leadership development, producing leaders with Christlike character, biblical wisdom, and strong relational, ministry, and leadership skills. From their perspective, as “the most effective incubator of spiritual leaders on the planet”, the local church is the answer to the shortage of church leaders in Africa and around the world.

Developing godly and gifted leaders is no small matter. Local churches may be “the most effective incubator of spiritual leaders on the planet”; but the dearth of spiritually mature leaders in the African church indicates that churches are not fulfilling this role. Moreover, even churches that have accepted the responsibility to raise up leaders often find that their programs lack transformational impact.

What can local churches do to enhance the effectiveness of their leadership development initiatives? How can churches build training programs that produce Christlike leaders? Part of the answer lies in ‘design’.

As the Creator and Master Architect of all that exists, God is a master of design. The universe, the earth, the human body, the Church of Jesus Christ — all of these show the design skill of God; and all of these are designed to function effectively. God created and designed the Church with a purpose — a missional purpose. That purpose finds its best expression in the local church. For the local church to fulfill its purpose, it must raise up leaders. When the church fails to raise up leaders, it has moved away from its design. God wants to restore the church to its biblical purpose; and the fulfillment of that purpose requires the

faithful adherence to and application of a God-given strategy. An important part of that strategy is church-based leadership development.

6.1.1 Review of Objectives

The purpose of this project is to identify key factors that facilitate the development of spiritually mature, well-equipped ministry leaders and how these factors can be effectively incorporated into the training design of a local church. As such, this project seeks:

- (1) To identify design elements fundamental to the creation and implementation of transformational church-based leadership development strategies.
- (2) To compile a set of recommended practices to guide churches in the design of effective leadership development programs and processes.

In an effort to identify factors that facilitate transformational leader development, previous chapters examined instructional design and adult learning theories, perspectives on leadership development in the New Testament, and insights from contemporary models and organizational research. This chapter integrates findings from these chapters with research on best practices in leader development in an effort to develop a set of recommended practices to assist church leaders to design church-based leadership training processes that are truly transformational.

6.1.2 Overview of the Chapter

This chapter is broken into nine sections. After explaining the motivation behind the use of the term ‘recommended practice’, an introductory section on foundational perspectives briefly reviews aspects involved in the shift to church-based leadership development and various dynamics involved in the development of Christian ministry leaders. Consideration is then given to a framework for leadership development in the local church. After a helpful overview of key design questions, the next section details ten ‘recommended practices’ for the design and implementation of leadership development

processes in the local church. Following this, additional consideration is given to critical success factors and cultural factors that could influence the effectiveness of training initiatives. The chapter culminates with a practical template to assist local churches in the design of leadership development initiatives.

6.2 Terminology: Is ‘Best Practice’ the Best Term?

The original intent of this project was to identify a set of ‘best practices’ in the design of transformational leadership development processes for the South African church. Unfortunately, the term ‘best practice’ has become a buzzword and is under increased scrutiny. Recent definitions of the term have sought to clarify its meaning. The *Gale Encyclopedia of Management* (2009:40-41) suggested that the term ‘best practice’ refers to the most efficient way of doing something, achieving high quality output using the least time, effort, and resources. The *Gale Encyclopedia of Small Business* (2007:90-92) describes the term as business jargon that arose from the ‘benchmarking’ management tool. According to this source, the term infers that there is enough uniformity among production and management processes to identify ‘best practices’ that can be adopted by other organizations with a reasonable expectation of the same outcomes.

As attractive as it may be, the concept of universal best practices has been called into question. Bardach (2000:71) suggested that the idea of a ‘best practice’ for all contexts is misleading and unrealistic since one can never be sure a practice is indeed the ‘best’ in every context. Instead of ‘best practice’ or even ‘good practice’, Bardach suggested the use of the term ‘smart practice’, indicating that the practice in question gets maximum results through minimum cost and effort in the context in which it is applied. Lending credence to Bardach’s argument, research among top companies by Efron, Greenslade, and Salob (2005) struggled to identify best practices that were replicable across every single organization.

In light of the controversy around the term ‘best practice’ and the uniqueness of each local church context, this project will instead make use of the term

‘recommended practice’. For the purposes of this project, a ‘recommended practice’ is a process or practice that was modeled with good effect by the Lord Jesus and/or the apostle Paul, proven to be effective in contemporary organizational settings (especially local churches), or recognized and endorsed by scholars and practitioners in the fields of leadership development, design, and learning.

6.3 Foundational Perspectives

In recent years, the concept of church-based leadership training has gained momentum in various parts of the world, including South Africa. The emergence of new leader-intensive ministry models such as the cell-based church, along with the costs, complexities, and contextual issues associated with theological studies at a Bible college or seminary, has motivated many churches to explore alternative approaches to the training of emerging leaders. Among these alternatives is ‘church-based leadership development’.

6.3.1 A Stronger Emphasis on Church-based Leadership Development

As Forman et al. (2004:23) noted, in the two hundred years after Pentecost, local churches were the “leadership incubators” that propelled the rapid expansion of the church. Contending that the church has a “God-given capacity to engage in whole-life leadership development” (Forman et al. 2004:25), church-based training advocates such as BILD International, the Centers of Church-based Training, and LeaderSource Strategic Global Alliance maintain that the local church is still the optimum environment for the development of Christian leaders. By its very nature, the local church has the potential to help leaders develop Christlike character, forge a sound theological worldview, and build the various skills needed for effective ministry.

In light of this, Forman et al. (2004:29-40) suggested that churches need to reconsider their approach to leader acquisition. Rather than adopting the professional ‘find an expert’ model so prevalent in the West, churches must embrace their biblical responsibility to raise up leaders. Needless to say, such a

major shift in thinking and practice is much more than an 'adjustment'. A commitment to church-based leadership development requires an intentional shift in values and priorities, a redefinition of purpose and ministry philosophy, a change in the way leaders view congregational members, and a willingness to invest in the development of a relatively small number of people over an extended period of time. However, when properly facilitated and supported by the church's influential leaders, such a shift creates a self-sustaining, church-wide culture of leadership development. In such a culture, not only are existing leaders at all levels of the church encouraged to grow, they are also challenged and empowered to identify and develop potential and emerging leaders (Forman et al. 2004:37). When a culture of leadership development is created, the church is better aligned with and more capable of fulfilling God's missional purposes.

6.3.2 Perspectives on Christian Leader Development

Clinton (1989:7) described a Christian leader (in the context of the church) as "a person with God-given capacity and God-given responsibility who is influencing a specific group of God's people toward God's purposes". Ultimately, God himself develops leaders over a lifetime through intentional, life-changing interventions in order to shape each person so that His specific purposes can be fulfilled in and through the each leader's life (Clinton 1989:7-8). From the New Testament, it is evident that much of this shaping occurs in the context of the body of Christ.

Clinton (1988:245) defined leadership development as the "measure of a leader's changing capacity to influence [other people], in terms of various factors, over time". Drawing a distinction between leadership development and leader development, Van Velsor and McCauley (2004:2) define leader development as "the expansion of a person's capacity to be effective in leadership roles and processes". They view leadership development as "the expansion of the organization's capacity to enact the basic leadership tasks needed for collective work" (Van Velsor and McCauley 2004:18). However, because this distinction is not clear in the literature, this project views leadership development in both the individual and collective senses.

Three concurrent and parallel processes occur in Christian leadership development: internal psychological processes, external sociological/contextual processes, and divine processes (Clinton 1989:69). According to Clinton, it is the combination of these three factors that develops the ability to influence.

Three types of formation are evident in the leader development process: spiritual formation, ministerial formation, and strategic formation (Clinton 1989:72-75). Spiritual formation matures one's relationship with God and develops character and purpose. Ministerial formation develops the giftedness and skills required for ministry, leadership, and relationships. Strategic formation moves the leader toward maximum influence and fruitfulness. All of these work together to increase the leader's capacity to be used by God.

Clinton's (1989:8) leadership emergence theory identifies three elements that contribute to a leader's development: processing, time, and responses. God shapes leaders over a lifetime through various processes, resulting in spiritual formation, ministerial formation, and strategic formation. Yet, there is more to 'processing' than God's sovereign work. Clinton (1989:21) highlighted the important role that existing leaders play in the development of emerging leaders. "A major function of all leadership is that of selection of rising leadership. Leaders must continually be aware of God's processing of younger leaders and work with that processing". Reinforcing this perspective, Webber (2008a:69) commented,

While God is the ultimate One responsible for all leader development, and the entire church community is responsible for the holistic development of the leader, primary 'hands-on' responsibility lies with leaders.... Leaders build leaders.

Several factors can hinder the development of emerging leaders. According to Clinton (1989:8), the one factor that most influences the emerging leader's development is his or her response to the processing. If the emerging leader resists the work of the Holy Spirit in his or her life, development will be retarded. One also has to wonder what role insensitive or insecure church leaders and unbiblical churches play in thwarting the emergence of promising young leaders. Van Engen (1996:240) highlighted another factor that can hinder the development of promising young leaders. He noted with regret that Christian

leaders often have a tendency to project their own formational experiences onto emerging leaders, with rather unfortunate consequences for their development. This ‘romanticized’ view of their own emergence tends to blind church leaders to other approaches to development, some of which may be more biblical and/or effective. This uncritical preference for the same old approach and methods also runs the risk of ignoring rather significant worldwide shifts in cultural realities, ministry context, ecclesiological perspectives, and learning methodologies. Furthermore, the unwillingness of supervising leaders to show flexibility can frustrate the creative work of the Spirit in the emerging leader’s life.

Christian leadership development is a transformational process driven by God himself; but transformation requires the emerging leader to cooperate with the Holy Spirit and the various agents in the body of Christ God chooses to use. Leaders, in particular, are entrusted with the responsibility of working together with the Spirit to facilitate the emergence and development of other leaders⁶². How best to facilitate this process in the context of the local church is the focus of this project.

6.4 Building a Framework

In spite of their best efforts, Efron et al. (2005) were unable to identify universal best practices in leadership development among the organizations they researched. Nonetheless, they did recognize a ‘framework’ common to organizations that have demonstrated effectiveness in the development of leaders. Though the purpose and nature of the church is somewhat different from that of the typical business organization, this leadership development framework adapts well to the local church context. Including three key elements, the framework observed by Efron et al. (2005) entails authentic leadership and inspiration from the CEO and board, a “maniacal focus” on emerging leaders with high potential, and the right leadership development practices ‘done right’.

⁶² The biblical roles and responsibilities of both ministry leaders and the Holy Spirit in the development of leaders are described in chapter four.

6.4.1 Strong Support from Senior Leaders

To achieve maximum effectiveness, church-based leadership development processes must be driven by the church's top leaders. As James and Burgoyne (2001:8) noted, the impetus for leadership development must come from the highest level of the organization. Indeed, as research has demonstrated, the commitment, leadership, and support of senior leaders are essential for long-term success in leadership development initiatives (Effron et al. 2005, Day and Halpin 2001, Bersin 2008, Curry 2012). As Effron et al. (2005) discovered, CEOs at many top companies are passionate about developing leaders, on the average investing twenty percent or more of their time in such efforts. The same research, backed by the findings of others (James and Burgoyne 2001:8), highlighted the extraordinary role board members play in the leadership development process. Not only do they ensure that such initiatives are ongoing, they also directly participate in the process by training and mentoring emerging leaders.

In the local church, the impetus for leadership development goes beyond the senior pastor, church board, or elders; it is driven by the Lord himself! While on earth, Jesus took personal responsibility to facilitate the development of the Church's first leaders, working closely with twelve hand-picked men over a period of three years, establishing a discipleship pattern to be emulated by subsequent generations of believers. The development of the Twelve was central to Jesus' strategy for the fulfillment of his Father's purposes and the birthing of the Church.

That the Lord Jesus placed a priority on facilitating growth to spiritual maturity cannot be doubted. After his resurrection, he directly commissioned his disciples to disciple others and to teach them all that he had commanded (Matthew 28:18-20). After the ascension, Jesus gave gifted people to his church to equip God's people for works of ministry, to build a united and spiritually mature body of people (Ephesians 4:11-13). A similar level of passion was evident in the ministry of the apostle Paul, who took the initiative to build into the lives of Timothy and other emerging leaders over an extended period of time.⁶³

⁶³ Sections 4.2 examines the New Testament mandates and motives for leader development. Section 4.3 describes the developmental practices employed by both Jesus and Paul.

Like Jesus and Paul, the most influential leaders in the church must be committed to the development of emerging leaders; for leadership is vital to the fulfillment of God's purposes. As Forman et al. (2004:129) conceded, unless key church leaders 'own' the vision for church-based leadership development, developmental initiatives are unlikely to succeed. Lack of ownership at top leadership level sets the stage for conflict and failure.

6.4.2 A Focus on Selecting and Developing Emerging Leaders with High Potential

A second characteristic of successful leadership development initiatives in top organizations is an intense focus on the identification and development of emerging leaders with high potential (Efron et al. 2005). Senior leaders with a commitment to leader development make sure that emerging leaders with high potential receive the attention, resources, internal training, and job assignments needed to accelerate their development. In addition, they ensure that these emerging leaders receive financial support commensurate with their potential. This same dynamic was evident in the apostle Paul's selection of Timothy. Recognizing his potential, Paul recruited Timothy to join his apostolic team and personally invested in his training and development over an extended period of time.

Webber (2008a:94-117) expressed concern that too many churches expend great effort investing generically in relatively large numbers of 'volunteers' rather than seeking to discern what God is doing in specific lives and cooperating with the developmental work of the Holy Spirit. Leadership development does not take place on a "production line". Rather, as Jesus so clearly modeled, potential leaders must be prayerfully and carefully selected and developed a few at a time over time (Webber 2008a:96-100). As Luke 6:12-13 makes clear, the selection of the right apprentices was so important to Jesus that he spent an entire night in prayer before choosing the Twelve. In addition, even after this selection, Jesus prioritized his relational investment, focusing especially on those who were to become senior leaders in the early church. In the same way, church leaders

must prayerfully identify those whom God has chosen for special ministry callings and work closely with the Holy Spirit to facilitate their development⁶⁴.

6.4.3 The Right Leadership Development ‘Done Right’

A third characteristic of a successful leadership development framework, and one that directly impacts design, is the right leadership development practices done in the right way. Effron et al. (2005) found that top companies make the effort to create their own unique, organization-specific strategy for selecting, developing, and rewarding emerging leaders. Recognizing the long-term strategic importance of emerging leaders, these organizations are not satisfied to depend upon short-term, ‘canned’ leadership courses from the outside.

One of the most common mistakes made by organizations who seek to develop leaders is the assumption that one-time courses are effective in actualizing major growth and change in emerging leaders. As Conger and Benjamin (1999:53) noted, “The expertise literature would argue that leadership, like any form of expertise, requires intensive, focused learning over extended periods of time to be developed”. Lending credence to this perspective, research by Ericsson, Krampe, and Tesch-Romer (1993) indicated that it takes up to ten years to develop expertise in a particular field.

Though courses can challenge paradigms and facilitate conceptual awareness, the best transfer of learning occurs when information and skills are learned through multiple experiences over an extended period of time (Conger and Benjamin 1999:52-53). Malphurs (2004:152-156) indicated that four types of training normally feature in leadership development: content-driven, experience-driven, mentor-driven, and learner-driven. Using a variety of learning experiences, Jesus himself invested almost three years in the development of his disciples; and the Holy Spirit continued to develop them after his ascension⁶⁵.

⁶⁴ Selection for leader development in the New Testament is highlighted in sections 4.5.4 and 4.7. Section 5.5.4.2 discusses the importance of wise selection for effective socialization of vision and values.

⁶⁵ See section 4.3, “The Developmental Methodologies of Jesus and Paul”.

The apostle Paul continued to build into his protégé Timothy right up until the end of his life.

The nature of a learning experience directly influences the outcome. As Conger and Benjamin (1999:52) noted, conceptual learning is most effective in multiple learning experiences over an extended period. Accompanying conceptual learning must be deliberate, focused, and repeated opportunities to put into practice what is being learned. It is through such experience that the tacit knowledge so important in leadership is acquired. Evidence is ample that effective leadership development requires a multifaceted, experiential, comprehensive learning approach. “No sound leadership development program consists solely of an instructor-led training event.... People learn to lead by doing, so the best leadership development programs focus heavily on experiential learning” (Bersin 2008:3).⁶⁶

Thirty years of research by the Center for Creative Leadership indicated that, though well-designed courses challenge paradigms, create conceptual awareness, and lay foundations, emerging leaders learn the most through challenging job assignments — in other words, on-the-job (Wilson et al. 2011:4). Research further indicates that on-the-job learning experiences are most beneficial when accompanied by immediate and specific feedback from mentors and coaches, who also assist emerging leaders through modeling, input, and practical guidance (Conger and Benjamin 1999:53, Wilson et al. 2011).⁶⁷

Researchers also found that the most effective developmental practices were those that “differentiated” the most promising leaders needed for the organization at that particular point in its lifecycle (Effron et al. 2005). These organizations employed a narrow leadership development approach focused on identifying,

⁶⁶ The critical role of experience in learning is highlighted in experiential learning theory (3.3.5), transformative learning (3.3.8), holistic learning theory (3.3.9), and Vella’s guide to design for adult learning (2.3.9).

⁶⁷ As section 4.3 indicates, Jesus employed an ‘in-service’ training model characterized by ‘up close’ modeling, engaging instruction, apprenticing, delegated responsibilities and assignments, and constructive feedback.

developing, and executing practices that would grow the type of leaders they needed for organizational success.

In the same way, churches need to identify and develop customized approaches to leadership development that support the church's mission and vision and are effective in their unique context. It is not enough to string together a few leadership courses and hope for the best. The development of emerging leaders is central to the fulfillment of God's purposes and must never be taken lightly. Local church leaders must take responsibility to facilitate the adoption or creation of holistic leadership development processes that promote spiritual, ministerial, and strategic formation and result in the development of healthy spiritual leaders (Webber 2008a, 2008b; Clinton 1989).

Local church leaders must also understand and accept that their leadership development efforts may not be for the sole benefit of the local church. God's missional strategy is to make disciples of all nations or peoples around the world. Church leaders must bear in mind the global nature of God's mission and cooperate fully with the Holy Spirit so that God's purposes in the lives of emerging leaders can be fulfilled, even if it means they will serve elsewhere.

6.5 Perspectives on Design: Asking the Right Questions

When considering training solutions, church leaders often look for quick and easy answers rather than expending the effort to pray, seek God, and research the best options. Too many church-based training programs are poorly conceived and executed, resulting in little, if any, personal transformation and application of learning to context. However, there is good news. Research has shown that effective design, coupled with effective implementation, accentuates learning (Webber 2008b).

For church leaders committed to the development of effective leadership training processes, an awareness and application of even the most basic principles and practices of instructional design could prove invaluable. Though a plethora of instructional design models exist, and churches would obviously be free to use whatever model(s) deemed most appropriate for their specific context and needs,

certain aspects of the instructional design process should be considered foundational to the design of training processes with transformational intent.⁶⁸

Piskurich (2006:1) described instructional design as a process that helps designers ask the right questions, make the right decisions, and produce a product (or process) that is usable for the effective teaching or training of people in their context. Perhaps the best way forward for churches who want to develop leaders lies not in the pursuit of easy solutions, but in the willingness to seek answers to the right questions. Church leaders endeavoring to create and implement transformational leadership development processes would do well to consider the basic questions voiced by Webber (2009), Smith and Ragan (1999)/Mager (1984), Morrison, Ross, and Kemp (2001), and Vella (2008) — questions which identify the most critical aspects of the instructional design process.⁶⁹

As Webber (2009:15) noted, leadership development can be likened to a journey.⁷⁰ Good design begins with the end or destination in mind. Who and what are we endeavoring to develop and why? What is the developmental goal? What characterizes a healthy, well-developed spiritual leader? What must this leader be able to do? Once the 'destination' is defined, once the desired end result is clear, the next step is to identify the stages of the 'journey'. What does it take to develop such leaders? What input, processes, experiences, and contexts are necessary to produce leaders of this nature? Once the various aspects of the 'journey' to the destination are understood, the way forward must be planned or 'mapped'. In cooperation with the Holy Spirit, a design must be prayerfully created that charts a pathway to the desired destination. The design is then carefully and diligently implemented in active dependence upon God, guiding the emerging leaders through the various learning experiences, trusting God for the desired results.

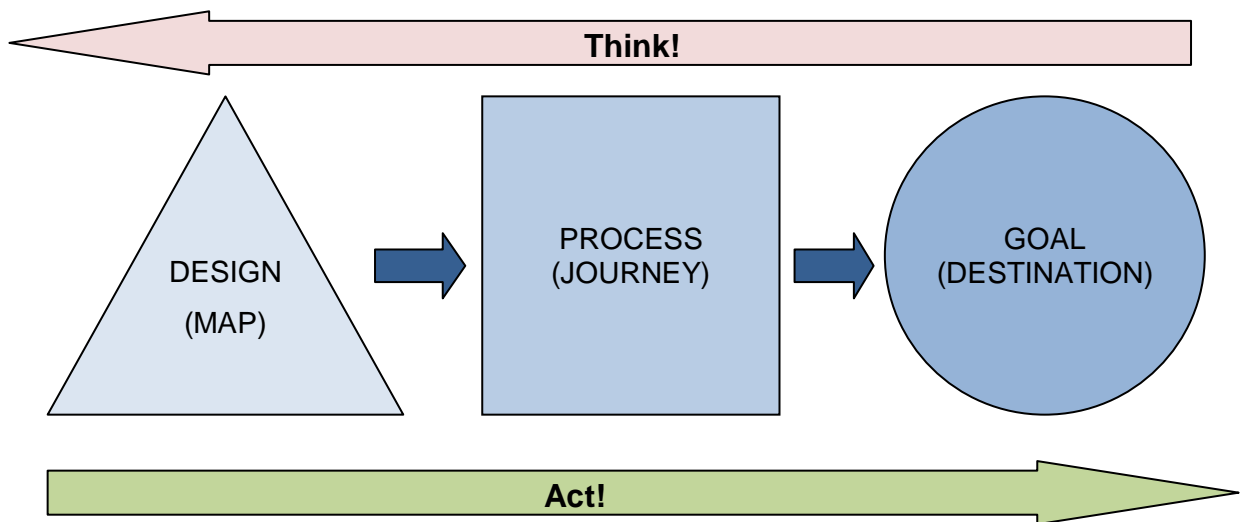
⁶⁸ Chapter two examines a cross-section of instructional design theories suitable for use in the design of everything from major courses to individual lessons. All of these models were developed with the non-expert in mind.

⁶⁹ Section 2.4.2 discusses generic questions which help to guide the design process.

⁷⁰ See section 5.3.3.7 for more detail on Webber's approach to design.

Figure 6.1: Components of Design for Development

(Webber 2009:15)



Mager (1984), who inspired Webber (as well as Smith and Ragan), suggested three simple questions to describe the design process.

- (1) Where are we going?
- (2) How will we get there?
- (3) How will we know when we have arrived?

Starting with the nature of the learners, Morrison et al. (2001:5)⁷¹ listed four questions that guide their design process.

- (1) For whom is the program being developed? What are the characteristics of the learners or trainees?
- (2) What is it that learners or trainees must learn or demonstrate? What are the objectives?
- (3) How is the subject content or skill best learned? Which instructional/learning strategies are most appropriate?
- (4) How can the achievement of learning be best evaluated?

“These four fundamental components — learners, objectives, methods, and evaluation — form the framework for systematic instructional planning” (Morris et al. 2001:5).

⁷¹ The MRK instructional design model is examined in section 2.3.4.

Similar to Webber's approach, 'backward design'⁷² also begins with the end in mind. As developers Wiggins and McTighe (2000:8) explained, in backwards design, the designer starts by envisioning the end goal (the desired results), and then determines the curriculum (journey) based upon two key factors:

- the evidence that must be exhibited to indicate that the developmental goal has been attained.
- the teaching, training, and experiences needed to equip learners to attain that developmental goal.

The understandings and practices to be demonstrated by the trainee determine the materials and activities to be used in the journey (Wiggins and McTighe 2005:14-15). For Wiggins and McTighe (2005:6), the best curricula or learning processes are those that specify "the most appropriate experiences, assignments, and assessments that might be used for achieving goals", including "what the learner should have achieved upon leaving", "what the learner needs to do to achieve", and what the facilitator, teacher, or trainer needs to do to see the learner achieve the desired results.

As mentioned previously, one of the most common mistakes in the design of leadership development 'programs' in the church is the tendency to depend primarily on 'courses' and 'content'. While courses and content can play a significant role, they are not enough to facilitate the depth of transformation required in Christian leadership. To be transformational, the design must be Spirit-enabled, holistic, and multifaceted. The developmental approach must include not only conceptual learning, but spiritual formation, relational empowerment, and in-service learning as well — all of which were evident in the developmental strategies employed by Jesus and Paul.⁷³

Synthesizing insights from Smith and Ragan (2004) and Morrison et al. (2001)⁷⁴ provides a solid platform from which to approach design. Once the 'who' is identified, the instructional design process starts by identifying and clarifying the

⁷² The backward design model of Wiggins and McTighe is described in detail in section 2.3.6.

⁷³ Section 4.3 examines the developmental approaches used by Jesus and Paul.

⁷⁴ The Smith and Ragan and MRK models are detailed in sections 2.3.3 and 2.3.4 respectively.

problem or learning need. As Vella (2008:32) put it, “What situation calls for this training?” Effective design requires the church leaders/designer(s) to have a clear sense of what emerging leaders should learn and how they must develop as a result of the leadership development initiative in order to address the need or rectify the situation. It is important to note that there is no single best way to design a developmental process. However, for the design to be effective, church leaders/designers must keep the goal in mind. The focus of the whole process is not the communication of content or the running of a program; it is the holistic, transformational development of the emerging leader.

While undertaking the design process, congruence among objectives, developmental activities, and assessments is vital. The developmental objective(s) must drive decisions about the learning activities and assessments to be utilized.⁷⁵ Church leaders must prayerfully seek to identify and design learning processes that are engaging, effective, and efficient.⁷⁶ The processes must facilitate learning of the desired knowledge, attitudes, and/or skills while requiring the least possible amount of time and effort to achieve the objectives.

An effective instructional design process requires attention to both the systematic procedure (the macro-view) and specific details within the plan (the micro-view). The success of the learning program is very much dependent on the quality of the information that flows into the instructional design process. This is why accurate upfront analysis, especially of the learning needs and context(s) of the emerging leaders, is so important.⁷⁷ Evaluation should be built into the design to ensure meaningful assessment of the emerging leaders’ progress and to identify ways in which the development initiative can be improved. As Morrison et al.

⁷⁵ As an overview of chapter two indicates, this is a fundamental characteristic of most instructional design models.

⁷⁶ Chapter three examines a number of key adult learning theories, all of which purport to explain in some manner how adults learn and how learning effectiveness can be improved.

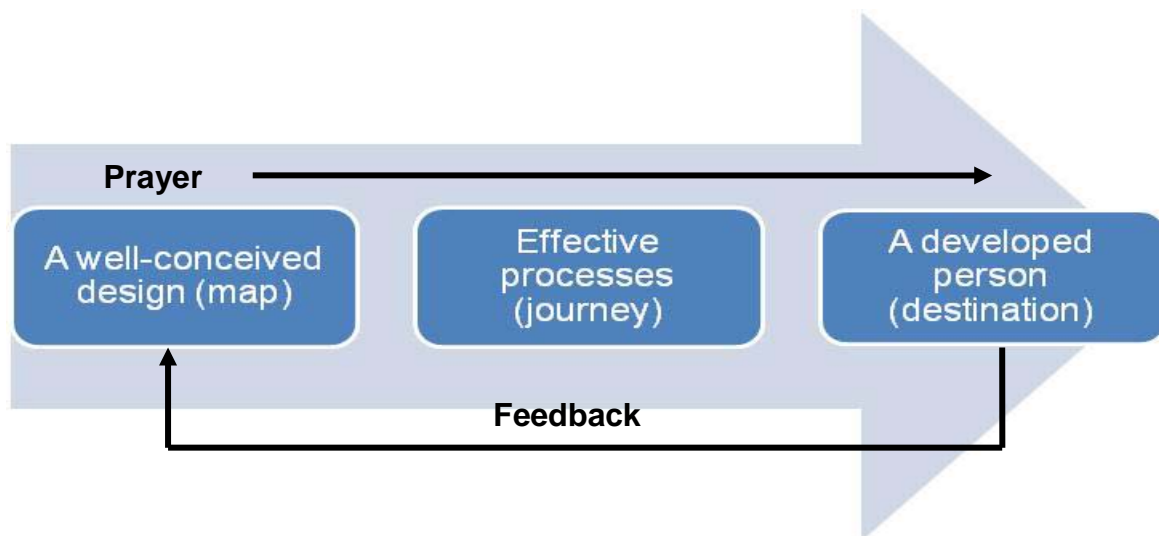
⁷⁷ Adult learning guru Jane Vella stresses the importance of a ‘learning needs and resources assessment’ before undertaking any form of training and development. For more information, see section 2.3.9.1 for an overview of Vella’s twelve principles of effective learning.

(2001:11) noted, “The proof of an instructional plan’s success will be whether a satisfactory level of learning is achieved in an acceptable period of time”.

Webber (2008a, 2009) described the Christian leadership development process as a journey.⁷⁸ It begins with the end in mind, identifies the processes and contexts required to reach that end, and develops a design to guide the process. The premise is that a well-conceived design employing effective processes, saturated in prayer, and enabled by the Spirit, will build a well-developed person, provided that the person cooperates with the process.

Figure 6.2: The Leadership Development Journey

(Modeled upon Webber 2009)



As Smith and Ragan (1999:5) noted, Mager’s (1984) three key questions reflect the three essential phases of instructional design. Morris, Ross, and Kemp (2001:5) added the critical fourth dimension — the nature and characteristics of the learners themselves. Challenging the content-driven mentality so common in church training courses, Vella (2008:32) contended that the design process always starts with the ‘Who?’, “because the learning of these men and women is the given purpose of any learning design”. However, in the Kingdom of God, one other question takes precedence — ‘Why?’ God’s purposes in Christian leadership development are directly linked to his missional purposes for the

⁷⁸ Webber’s leader development design model is described in section 5.3.3.

Church and the world. This foundational understanding is the root from which all church-based design must spring.

6.6 Recommended Design Practices for Church-based Leadership Development

Though the character, context, and leadership needs of every organization are unique, researchers and practitioners have identified a number of practices that tend to enhance the effectiveness of leadership development processes in most organizations. Drawing upon these findings and research from the previous chapters, this section endeavors to provide a set of recommended practices to assist local churches to design effective leadership development processes. However, the design of church-based leadership development initiatives cannot be based on a secular worldview. The mandate to develop leaders is rooted in the heart of God; and this requires a biblical perspective.

6.6.1 Approach Design with a Biblical Perspective

Church-based leadership development is God's idea, and any perspective on its design must be informed by biblical instruction and example. In the corporate world, leadership development is most often about furthering business goals, gaining competitive advantage, and increasing profits. However, in the Church of Jesus Christ, leadership development has a much higher, eternally significant purpose. God raises up leaders to achieve his purposes among and through his people.

The development of leaders was an important ministry focus in the lives of the Lord Jesus and the apostle Paul.⁷⁹ During his three years of earthly ministry, Jesus invested a significant amount of time and effort in the development of those who were to become the Church's first leaders. Like Jesus, the apostle Paul also placed priority on the development of emerging leaders. The impact of

⁷⁹ See section 4.2 for a discussion on the biblical mandates for leader development and section 4.3 for an examination of the developmental methodologies used by Jesus and Paul.

their leadership development legacy remains to this day. We would be wise to learn from their model, strategies, and methodologies (Coleman 1964:18).

After his death and resurrection, Jesus commissioned his disciples to take the gospel to the world. His plan for them was not haphazard. Empowered and directed by His Spirit, they were to follow the strategy Jesus outlined in Matthew 28:18-20. Replicating the pattern Jesus used, they were to make disciples of all nations or peoples, teaching them to observe all that Jesus had commanded. The process that Jesus himself had started they were to continue, raising up others who, in turn, would also make disciples.

As the Book of Acts indicates, out of this early disciple-making community, new leaders began to emerge. Paul explained that the Lord Jesus himself gave gifted spiritual leaders to the Church

for the equipping of the saints for the work of service (ministry), to the building up of the body of Christ; until we all attain to the unity of the faith, and of the knowledge of the Son of God, to a mature man, to the measure of the stature which belongs to the fullness of Christ (Ephesians 4:12-13).

These gifted leaders were not to build ministries around their gifts, but to use their giftedness to equip God's people for ministry, so that the body of Christ might be built up, becoming mature and united in Christ.

Even though Christ himself gave these leaders to the broader Church, the preponderance of evidence indicates that these gifted people developed into leaders in the context of the local church. Barnabas developed in the Jerusalem church under the apostles and was influential in raising up Paul (Acts 9-13). Paul, in turn, was influential in raising up Timothy (Acts 16-20, 1 and 2 Timothy), who had already been recognized by the elders in his local church. Timothy was later entrusted by Paul with the responsibility to continue the cycle. "The things which you have heard from me in the presence of many witnesses, entrust these to faithful men who will be able to teach others also" (2 Timothy 2:2). From Paul's letter to Titus, it is apparent that those appointed to eldership in the early church grew to spiritual maturity in the context of the local church (Titus 1:5-9).

Clinton (1988:22) noted that “effective leaders recognize leadership selection and development as a priority function”. Setting the example, the Lord Jesus himself established the long-term developmental strategy to be utilized by the church. Moreover, he gave gifted leaders to the church to equip God’s people for ministry. Like Jesus, the apostle Paul understood the strategic importance of developing leaders. He invested heavily in emerging leaders and exhorted Timothy to do the same (2 Timothy 2:2). Indeed, Paul’s ultimate desire was to see every person fully developed in Christ (Colossians 1:28). This should be the passionate desire of every church leader today.

Any initiative to develop leaders in the context of the local church must be birthed out of the developmental mandates so evident in the New Testament and the leading of the Holy Spirit.⁸⁰ God himself raises up leaders to accomplish his purposes; and church leaders are responsible to discern his purposes in the lives of emerging leaders, cooperate with his Spirit, and obey the developmental mandates of scripture. Though the fields of instructional design, adult learning theory, and organizational research can give us practical insight, ultimately, the development of leaders in the context of the church is a spiritual exercise with a spiritual purpose. As such, it must be approached from a biblical perspective.

6.6.2 Create Alignment

Researchers have found an inextricable link between the future of organizations and the development of their emerging leaders. For an organization to continue to succeed, it must develop a continual stream of leaders who understand and embrace the organization’s purposes and ethos and who are equipped to deal with real-world challenges. However, for leadership development to benefit an organization, it must be intimately interlinked with the organization’s vision, values, and behavior (James and Burgoyne 2001:8). In an analysis of six major

⁸⁰ The developmental mandates in the New Testament are discussed in section 4.2. The developmental role of the Holy Spirit is described in section 4.5.

studies⁸¹, Curry (2012) found unanimous recognition of the importance of close alignment between leadership development and organizational strategy, especially as it concerns addressing the real challenges faced by the organization. To achieve this alignment, there must be a vital, ongoing synchronization between the organization's senior leaders and those who design and facilitate leadership development processes.

If alignment is critical for secular organizations, how much more for the church! For church-based leadership development to serve the purposes of God there must be alignment between the local church's vision and strategy and the mission and strategy of the Church as revealed in scripture. It is out of this alignment that the leadership development initiative must spring. The development of leaders in the local church is part of God's missional strategy for the universal Church; for it is in and through the ministry of the local church that the God-given mission and strategy of the universal Church finds its primary expression. Alignment with God's purposes and strategy at local church level mandates a focus on discipleship and leadership development. Church-based leadership development is not just a trendy idea; it is vital to the very existence and mission of the church. Only leadership development that aligns with God's objectives and strategies for his local church will facilitate 'the whole Church taking the whole gospel to the whole world'⁸². In order to create alignment, church leaders must prayerfully assess and, if necessary, modify the local church's vision and strategy in light of biblical mandates highlighted in section 4.2. Once the local church aligns its vision and strategy with objectives and strategies defined in scripture, leadership development will find its proper place in the local church.

Any major realignment in the mission, vision, and strategy of a local church usually requires modification of the church's philosophy of ministry. Westing (1993:65) noted that, because it provides a set of well-considered principles that

⁸¹ Howard and Wellins 2008, O'Leonard 2008, DDI 2008, Groves 2007, Leskiw and Singh 2007, and Amagoh 2009.

⁸² The slogan of The Lausanne Movement (2012)

serve as a reference point for goal-setting, decision-making, strategic planning, and evaluation, a biblically aligned philosophy of ministry is of great value in determining ministry priorities and guiding the structure and planning of resulting activities. Rather than describing the destination, a ministry philosophy provides direction and boundaries (Westing 1993:66). Westing (1993:65-77) suggested that a healthy ministry philosophy is best constructed by seeking God diligently, discovering and embracing a biblical understanding of the church, defining a unique God-given church vision, assessing the surrounding environment (context and culture), acknowledging the history (especially commitments) and culture of the church (without being bound to it), designing ministry based on a recognition of strengths and limitations, and evaluating continually. As Westing (1993:77) observed, the best ministry philosophies are scriptural, relatively simple, transferable, and flexible.

6.6.3 Create a Developmental Pathway

One of the great frustrations for emerging leaders is the lack of a developmental pathway in many local churches. This lack of developmental opportunities often compels promising young leaders to seek opportunities outside the church. Many secular organizations have a leadership pipeline into which high potential leaders are channeled. The purpose of this pipeline is twofold. It ensures that the organization never lacks for effective, strategically aligned leaders; and it increases the likelihood that promising individuals will remain with the organization (Conger and Fulmer 2004). Though emerging leaders certainly benefit from inclusion in the pipeline, for the organization, the process is essentially self-serving.

Churches have an obligation to look beyond self-interest in order to help emerging leaders grow into their full potential in Christ and fulfill their God-given purpose. When local churches embrace a 'kingdom' mindset and develop a well-designed and supported pipeline or pathway, they rarely suffer from a lack of leaders. For example, Maranatha Community Church⁸³ (Kempton Park, South

⁸³ The proprietary model developed by Maranatha Community Church is described in section

Africa) has successfully designed and implemented a developmental pathway that provides opportunities for emerging leaders to grow from assistant cell leaders right through to full-time pastors. Evidence of success, all fourteen of the church's full-time pastors are 'home grown'.

6.6.4 Define the Developmental Goal(s)

The first step in the design of a leader development process is to define the goal or, stated differently, to describe the desired end result (Webber 2008a:18).⁸⁴ The goal of a church-based leadership development initiative is the production of spiritually healthy, biblically wise, well-equipped, Christlike leaders. To gain clarity, church leaders must ask themselves some important questions. What characterizes a successfully developed, spiritually healthy leader? What knowledge, character traits, and skills (levels of competence) must this person possess to function successfully in the church community and to fulfill God's ultimate purposes in his or her life? Questions such as these enabled Webber to create a visual/descriptive model (the '5C Model')⁸⁵ that encapsulates his understanding of a mature, holistically developed spiritual leader. Because this so clearly defines the developmental objective(s), the design process becomes more focused and strategic. Churches seeking to develop spiritual leaders would be wise to emulate Webber's approach by developing their own models.

Research by Conger and Riggio (1999:33) indicated that a lack of clarity about what leadership is and the kind of leaders to be developed tends to result in poorly focused program designs, excessive or inappropriate content, and frustrated learners. The end goal determines the processes to be used in the design. If the developmental goal is unclear or inappropriate, then the envisioned processes are not likely to produce a well-developed leader.

5.4.1.

⁸⁴ See section 2.1.4. As Smith and Ragan (2004:22-23) noted, a clear understanding of the developmental goal is critical to the design of an effective learning process.

⁸⁵ Webber's '5C' model of healthy leadership is described in section 5.3.3.3. More information on the model is available online at <http://www.leadersource.org/about/models.php>.

Leadership development processes in the local church must produce mature and balanced leaders. Clinton (1989) noted that, since leaders minister out of 'being', development processes must emphasize spiritual formation and character in addition to knowledge and skills (Clinton 1989). Using a head, heart, and hands analogy⁸⁶, Forman et al (2004:62-63) emphasized the importance of developing servant leaders who are biblically wise, Christlike in character and compassion, and skilled in equipping others. Webber (2008a:18-19) stressed the importance of developing 'healthy' Christian leaders who know Christ intimately, pursue and practice healthy relationships in biblical community, walk in integrity, have clear God-given vision, and possess the knowledge, gifts, and skills necessary for effective ministry.

Effective design requires an understanding of what kind of leaders the church needs to develop. Clearly identifying the knowledge, character, and skills leaders need better enables designers to determine the types of experiences that will achieve these developmental goals.

6.6.5 Conduct a Needs Analysis

Analysis plays an important role in the design of an effective leadership development process.⁸⁷ First, church leaders must give consideration to the leadership needs of the church in light of scripture, mission, strategy, and context. This analysis provides church leaders and designers with insight on the types of leaders needed in the church. However, this analysis should extend beyond the leadership needs of local church to the broader community and the world. One important way the local church participates in God's worldwide mission is raising up leaders such as church planters, evangelists, and pastors and teachers to serve in the broader missional context as the Spirit directs. Local church leaders must prayerfully weigh their biblical responsibility to participate in

⁸⁶ The head, heart, hands model is illustrated in figure 5.3 in section 5.2.3.

⁸⁷ Berger and Kam (1996) consider analysis of the organization's leadership needs and the potential leaders' learning needs as a fundamental prelude to the design of any leadership development process.

God's mission and pay attention to the leading of the Holy Spirit as they consider this context during the analysis phase.

A second and equally important step involves analysis of the developmental needs of emerging leaders. While some aspects of leadership development may be generic, emerging leaders are individuals with unique backgrounds, personalities, gifts and talents, skills, and callings. One size does not fit all in leader development. As Knowles⁸⁸ (1984:418) suggested, an effective approach to adult learning requires the teacher or designer to understand the specific characteristics of the adult learners, the subject matter, their readiness to learn, and the nature and appropriateness of the learning context. Dick, Carey, and Carey⁸⁹ (2005:6-7) highlighted the importance of a learning needs assessment before the design of any learning experience. Going further, Vella⁹⁰ (2002:5-6) suggested that an interactive 'learning needs and resources assessment' precede every learning experience in order to ascertain expectations, identify specific needs and interests, and assess readiness for learning. As she so aptly noted,

Listening to learners' wants and needs helps shape a program that has immediate usefulness to adults.... People are naturally excited to learn anything that helps them understand their own themes, their own lives (Vella 2002:5-6).

Smith and Ragan⁹¹ (1999:43) stated bluntly that understanding the learners is essential for the design of effective learning processes. The emphasis of learner analysis is not so much "what learners should be like or what they need to know, but what they *are* like and what they *do* know" (Smith and Ragan 1999:43). Assessment of both prerequisite prior learning (assessing the ability to learn) and

⁸⁸ Andragogy, Knowles' approach to adult learning, is discussed in detail in section 3.3.4.

⁸⁹ The well-recognized Dick and Carey systems approach model for instructional design is described in section 2.3.3.

⁹⁰ Vella strongly emphasizes the importance of the 'learning needs and resources analysis' as an initial critical step in instructional design. Vella's twelve principles of adult learning are described in section 2.3.9.1.

⁹¹ The well-structured instructional design model of Smith and Ragan is analyzed in section 2.3.3.

readiness to learn (willingness based on relevance) is critical.⁹² The ability and readiness to learn are important factors in the success and failure of learning programs. One cannot build where a foundation does not exist; and one does not want to expend the time and resources necessary to dig the same hole twice.

6.6.6 Adopt a Holistic, Transformational Approach

The emergence of healthy spiritual leaders in the local church is best facilitated by a holistic, transformational process that actively promotes development in the three learning domains of being, knowing, and doing.⁹³ As mentioned previously, Forman et al. (2004:25) stressed the importance of a whole-life approach that develops servant leaders who know God and his word (head), demonstrate Christlike character and compassion (heart), and are effective in ministry and mission (hands). A well-conceived approach to leadership development seeks to develop character and enhance spiritual formation, to impart an essential knowledge of scripture, theology, and culture, and to promote the development of critical ministry, relational, and leadership skills.

‘Transformation’ (as described in scripture) is a fundamental ingredient in the development of Christlike leaders. Contemporary approaches to the development of spiritual leaders often fail to recognize the importance of creating a context that facilitates transformation. After examining the developmental methods employed by Jesus and the early church, Webber (2008a:9-11) identified several critical dynamics that create such a context. Webber found that the likelihood of transformation is enhanced by an environment characterized by authentic encounter with God, a relational web among a group of disciples (emerging

⁹² As chapters two and three make clear, the assessment of prior learning and the readiness to learn are fundamental to the development of an effective learning design and the creation of effective adult learning processes.

⁹³ Vella (2.3.9.1), Kolb (3.3.5), Yang (3.3.9), Richards (4.8.2), Clinton (5.2.2), Miller (5.3.2.2), and Webber (5.3.3.3) all stress the importance of a holistic approach to training and development. In addition to Webber (5.3.3), Mezirow’s transformative learning theory (3.3.8), Vella’s dialogue education (2.3.9), the teaching approach of Jesus (4.3.10.4), the work of the Holy Spirit (4.5), and Willard (4.6) all focus on the aspect of personal transformation.

leaders) and an exemplary spiritual leader, and an experiential context in which emerging leaders undertake challenging assignments, come under pressure, and experience diverse learning opportunities. It is in this multifaceted context that the fourth dynamic, instruction in God's word, has its greatest effect. Hence, if local churches want their leader development processes to maximize the likelihood of personal transformation, the following four dynamics must be recognized and intentionally integrated into the developmental design (Webber 2008a:9-10).⁹⁴

- The transforming power of the Holy Spirit
- The transforming power of human relationships
- The transforming power of life experiences
- The transforming power of God's word

From a biblical perspective, transformation involves the 'renewing' of the mind (Romans 12:2) and is a work of the Holy Spirit (2 Corinthians 3:18).⁹⁵ Burer (2006:4) described transformation as an intentional process through which Christlikeness is formed in the inner man. As Burer (2006:4) noted, this process is doubly intentional. It is God's desire for the individual believer; and the individual believer must desire it from God. In biblical transformation, the character of Christ is the goal and standard of measure.

Expanding upon Burer's basic description, The Center for Christian Leadership (2004:11) described transformation as "the process by which God forms Christ's character in believers by the ministry of the Spirit, in the context of community, and in accordance with biblical standards". This process affects the whole person, with inner change manifesting in outer behavior and self-centeredness being replaced by "a life of service to others and witness for Christ".

While good design cannot guarantee transformation in the lives of emerging leaders, it can facilitate transformational encounters by creating a context conducive to spiritual development.

⁹⁴ For additional insight on Webber's dynamics of transformation, see section 5.3.3.4.

⁹⁵ Perspectives on biblical transformation are discussed in section 4.6.

6.6.7 Identify, Utilize, and Link Effective Developmental Processes

The most effective leadership development processes employ a variety of linked learning experiences over time. Research conducted by the Center for Creative Leadership has confirmed that

no single developmental event, no matter how powerful, is enough to create lasting change in an individual's approach to the tasks of leadership. Leader development is a lifelong, ongoing process (Van Velsor, Moxley, and Bunker 2004:204-205).

There is simply no single event or experience that produces 'leaders'. Church leaders must move away from thinking in terms of leadership training as an 'event' and understand that leadership development is a long-term process. The traditional classroom or seminar approach, while helpful in creating conceptual awareness, conveying declarative knowledge, and laying cognitive foundations, is insufficient for the development of leaders. Churches must accept the responsibility to design, develop, and implement long-term initiatives that utilize a variety of recognized processes to facilitate the training and development of Christlike, biblically wise, well-equipped leaders. This section assists church leaders by highlighting a number of design elements gleaned from previous chapters that have proven to enhance the effectiveness of leadership development efforts.

6.6.7.1 The Three Most Effective Developmental Processes

The Center for Creative Leadership has ascertained that a combination of *challenging job assignments*, *developmental relationships*, and *well-designed coursework* (instruction or training) has proven effective in developing leaders. Research on top leaders indicates that about seventy percent of learning comes from challenging job assignments (and all this entails), twenty percent from developmental relationships, and ten percent from coursework and training (Center for Creative Leadership 2011).⁹⁶ Less experienced leaders or non-

⁹⁶ The 70-20-10 guideline is discussed in greater detail in section 5.5.1. Interestingly, as chapter

leaders may derive greater benefit from foundational coursework; but research indicates that even non-leaders learn between seventy and eighty percent of their work-related knowledge on the job or from coworkers and mentors (Connor 2012, Dobbs 2000).

Though the role of coursework and training in leadership development may seem insignificant, this is not accurate. Well-designed courses, instruction, and training provide the foundations upon which other forms of learning build. Moreover, they have a very significant ‘amplifier’ or ‘spill-over’ effect through direct integration with the other learning experiences (Wilson et al 2011:6). Even a cursory examination of the developmental strategy used by Jesus reveals his commitment to an integrated learning approach of this nature. In the context of the church, courses, instruction, and training provide much of the conceptual knowledge needed to develop a sound theological perspective. Nonetheless, being a leader requires much more than formal knowledge. Leaders must also develop the tacit knowledge so critical to effective leadership; and this requires learning in other ways. Holistic, transformational leader development requires a multifaceted approach; and *it is the intentional integration of coursework (instruction and/or training), developmental relationships, and challenging work assignments that makes this learning combination so effective.*

Webber (2008a, 2008b) and Forman et al. (2004) support the need for an integrated, multifaceted approach to leadership development in the local church.⁹⁷ The CCBT (2011) advocates a ‘whole-life’ learning process that employs wisdom-based courses on key biblical and ministry-related truths, involvement with and learning in an authentic community of faith, and life-on-life mentoring/apprenticeship relationships (Forman et al. 2004:25). Webber (2008a:13) advocates the use of a holistic developmental process that incorporates spiritual, relational, experiential, and instructional elements in order to facilitate authentic transformation.

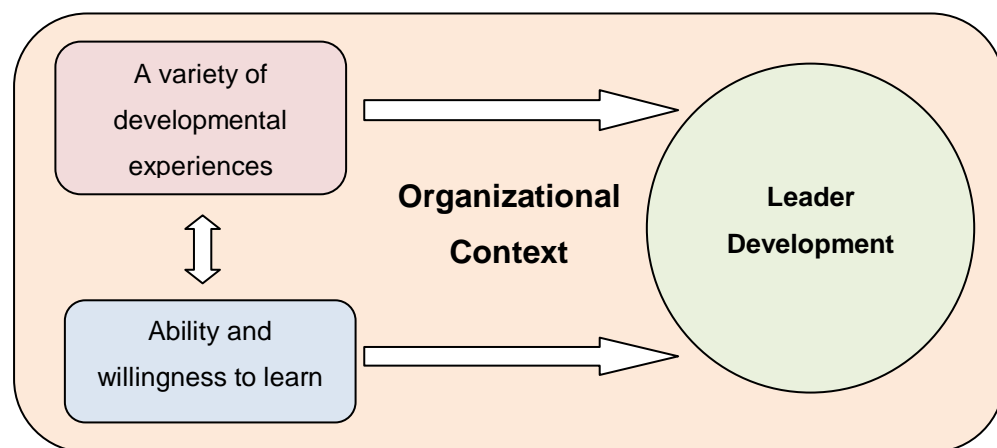
four indicates, these three elements were fundamental to the developmental approach employed by the Lord Jesus.

⁹⁷ See sections 5.3.2 and 5.3.3 for more details on the CCBT and Webber models.

Emerging Christian leaders develop best through a variety of learning experiences including well-designed (and implemented) courses centered in the word of God, developmental relationships (such as those found in a learning community, discipleship, mentoring, and/or coaching), and challenging job assignments (especially when initially ‘apprenticed’). When these learning experiences are meaningfully linked and designed to reinforce one another, when adult learning principles are honored⁹⁸, and when meaningful feedback and opportunities for reflection form a regular part of the learning process, the likelihood of transformative learning is high.

Figure 6.3: The Development Process

(adapted from Van Velsor and McCauley 2004:4)



6.6.7.2 Making Experiences Developmental

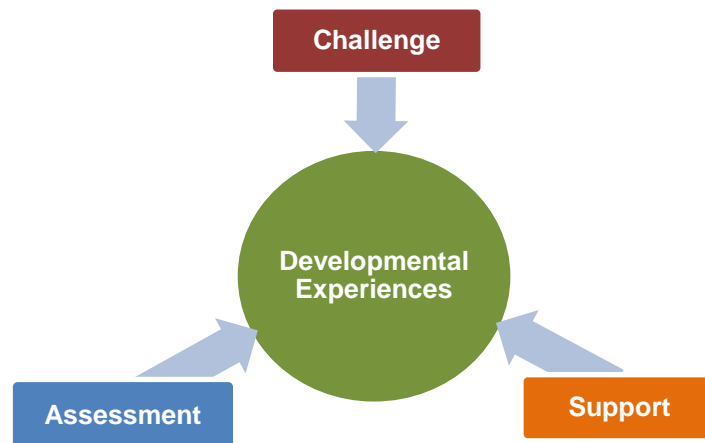
According to Van Velsor et al. (2004:204-205), the best development occurs when individuals have a variety of developmental experiences over time and, of course, the ability to learn from those experiences (see Figure 6.4). Though conceptual awareness and relational empowerment contribute to leader development, research indicates that the majority of leadership lessons are learned through experiences ‘on-the-job’. Even though most learning comes through experience, Van Velsor and McCauley (2004:2-12) identified three key elements that, when effectively combined, have the ability to make most

⁹⁸ See section 3.4 for an overview of recommended practices in adult learning.

experiences (including courses and assignments) inherently ‘developmental’ (see Figure 6.5). These critical factors are *assessment*, *challenge*, and *support*.

Figure 6.4: Factors That Make Experiences Developmental

(adapted from Van Velsor and McCauley 2004:4)



The three key elements of assessment, challenge, and support increase the developmental potential of experiences in two ways (Van Velsor and McCauley 2004:5-12). They motivate the emerging leader to learn, grow, and change; and they provide information, situations, and personal interactions that facilitate transformative learning. Assessment, whether done by self or others, whether formal or informal, helps people understand their strengths and weaknesses, evaluate their effectiveness, recognize incorrect assumptions and ‘misbeliefs’, and identify areas of needed growth. Challenging experiences such as new situations, expanding responsibilities, stretching job assignments, difficult goals, conflict, and hardships create the kind of discomfort and disequilibrium that motivates and drives change. However, for assessment and challenge to have a positive effect, support is critical.

The disequilibrium caused by challenge and the shortcomings highlighted through assessment can create a sense of insecurity or threat for an emerging leader. Timely and appropriate support from significant people in the emerging leader’s life (family, supervisors, mentors, and peers) can do much to allay insecurity, provide a sense of safety and comfort, and create an assurance that

equilibrium will be restored.⁹⁹ Support can come in many forms. Encouragement, empathy, reassurance, feedback, counsel, prayer, resources, recognition, and celebration of even the smallest amount of progress — all of these can make a significant difference in an emerging leader's life. However, personal support is not enough. Support must also come from the organization's systems and culture, both of which should be geared to provide the reassurance, resources, and rewards that create a sense of safety and encourage growth. Without support from family, supervisors, and peers, and without support from the organizational systems and culture, experiences that are intended to be developmental can be counterproductive.

It comes as no surprise that leadership development in the New Testament also involved a multifaceted approach. The Lord Jesus used modeling, close association, mentoring/apprenticeship, interactive instruction, challenging assignments, on-the-job learning, and feedback to train the Twelve.¹⁰⁰ The three developmental elements of assessment, challenge, and support were very evident in the various leader development processes used by Jesus, as were the three most effective learning experiences of instruction/teaching, apprenticeship/mentoring/coaching, and challenging ministry assignments. As Webber (2008b) noted, Jesus added to this instructional, relational, and experiential approach a spiritual dynamic, making his leader development process truly transformational. If local churches want to be successful in developing emerging leaders, they must learn from the master teacher.

6.6.7.3 Coursework That Works

In the Kingdom of God, ignorance is not bliss. In order to function effectively in Christian leadership, the emerging leader must have a sound and applicable knowledge of God's word, the nature of humankind, and the world in which he or

⁹⁹ Vella considers emotional 'safety' as one of the most important conditions for effective adult learning. See section 2.3.9.1.

¹⁰⁰ For an overview of the multifaceted developmental approach used by the Lord Jesus, see section 4.3.

she is called to minister. Though most leadership lessons are learned through experience, factual and conceptual knowledge is usually learned through cognitive processes.

Sadly, teaching ministries in local churches are often ineffective. Too many pastors, teachers, and trainers believe that their 'job' is to present content, while the 'job' of the receiver is to 'learn'. However, as Jane Vella (2008:xviii) so aptly stated, "The end of teaching is learning". 'Good' presentations are not the goal! *Good learning* is the goal; and, good learning normally involves a process.

For coursework to be effective, designers must take into consideration the needs and prior experience of the learners, the nature of the content, the context of learning and application, and the ability and availability of the instructor(s)/facilitator(s). All of these play a vital role in the learning process. For the Christian teacher/facilitator, however, the Holy Spirit is the ultimate enabler. Dependence upon the Spirit is critical in both the design and instruction processes.

Even as the local church's overall approach to leadership development can benefit from effective design, so can the coursework. Courses should align with and support the broader leadership development goals and process. Built in to each course must be the three developmental elements of challenge, assessment, and support (Van Velsor and McCauley 2004:5-12). To make the process more effective, there must also be a strong link between the theoretical and the practical, between learning and application to context.¹⁰¹ Wherever possible, courses need to be integrated with other learning processes such as mentoring/coaching and challenging ministry assignments.

¹⁰¹ Even in short dialogue education courses, Vella uses well-designed, participative learning tasks to provide learners with opportunities to work with content in a meaningful way, thus enhancing authentic learning and increasing the likelihood of long-term transfer into context. She considers transfer into context and long-term organizational impact as measures of success (Vella 2002:xvi).

Conger and Benjamin (1999:37) found that precourse preparation increases effectiveness. When participants reflect on their own leadership attitudes and behaviors and how future learning can be applied in their work/ministry environment, this encourages authentic change. In addition, precourse questions enable designers and trainers to address issues of real concern to the participants. A helpful byproduct, advanced preparation puts participants on the 'same page' with the facilitators and each other as they meet together for the learning experience.

How courses are facilitated makes a big difference. Participants learn more effectively when they are actively engaged in the learning process and have the opportunity to work with content in a meaningful way. To be encoded in long-term memory, new information must be meaningfully related to previously encoded and categorized information (Driscoll 2000:91).¹⁰² If information or concepts cannot be meaningfully related to previous learning, then foundational concepts must first be addressed. Proper sequencing ensures that learning moves from the known to the unknown, from the simple to the complex, and from group-supported work to individual efforts (Vella 2002:13). As Vygotsky noted, learning occurs as individuals engage with each other about shared problems and tasks, especially when new information or skills fall within the learner's zone of proximal development.¹⁰³ As adult learners engage with the material and each other, as new information is linked to previous learning, as new information and concepts are applied to context or used to solve problems, as individual participants engage in self-assessment, discussion, and reflection, meaning develops and the likelihood of useful integration into long-term memory increases. In the church-based context, the active involvement of the Holy Spirit enhances the learning experience.

¹⁰² See sections 3.3.2.3 through 3.3.2.4 for more information on meaningful learning, categorization, and information processing.

¹⁰³ See section 3.3.6.4. Vygotsky's 'zone of proximal development' describes the gap between a learner's current knowledge/skill level and the next knowledge/skill level that a learner can reach with assistance from more competent people. Instruction and support (scaffolding) that engages with a person's zone of proximal development usually results in cognitive growth and skills development.

Those who design and conduct coursework for adult learners must bear in mind that adults often approach learning differently from children (Knowles 1990:57-63, Vella 2002:3-27). This is a primary premise of adult learning theory.¹⁰⁴ Adults, and especially emerging leaders, tend to be motivated by intrinsic factors and prioritize learning that helps them to be more successful or competent in the execution of their responsibilities.¹⁰⁵ When adult learners see practical value in what is being ‘taught’, they are far more likely to take ownership in the learning process. Unlike children, adults are self-directing and bring their own perspectives and experiences into a learning environment. As such, they need to be treated with respect; and their participation in the learning process should be encouraged and valued.¹⁰⁶

Approaches to the facilitation of adult learning vary. Cognitive strategies¹⁰⁷ seek to help people modify perceptions and behavior through the meaningful integration of new knowledge into long-term memory. Constructivist approaches¹⁰⁸ seek to help adult learners construct their own meaning from various learning experiences, most often in a social context. The humanist perspective seeks to promote actualization and self-efficacy with a view toward the maximization of potential. Transformative learning¹⁰⁹ helps learners to embrace more accurate perspectives by questioning the assumptions upon which their understanding of reality is built. Dialogue education¹¹⁰ uses dialogue and well-designed learning tasks in an adult-friendly environment to promote

¹⁰⁴ Adult learning theory is examined in chapter two.

¹⁰⁵ Knowles et al. (1998:64-69) asserted that adults have a ‘life-centered’ orientation and become ready to learn when new knowledge or skills help them cope with real-life situations. See section 3.2.

¹⁰⁶ Vella’s twelve principles in section 2.3.9.1 provide an excellent overview of practices that enhance adult learning.

¹⁰⁷ See section 3.3.2 for an overview of cognitive learning models.

¹⁰⁸ Constructivism is addressed in section 3.3.6.

¹⁰⁹ Various perspectives on transformative learning are examined in section 3.3.8. Transformative learning is essential for the development of spiritual leaders.

¹¹⁰ Dialogue education, a unique approach to education utilizing elements from humanistic, cognitive, constructivist, and experiential approaches to learning, incorporates its own unique approach to design and, thus, is discussed in section 2.3.9.

authentic learning with a view toward long-term transfer into context. The last four, in particular, recognize and capitalize on the roles of social interaction and experience in learning. With so many adult learning perspectives and instructional strategies available, coursework should never be boring or ineffective.

Even as there are many approaches to adult learning, there are even more techniques to enhance learning! Effective learning strategies employ a variety of learning methodologies.¹¹¹ Lectures or presentations in coursework can be punctuated by creative exercises, interesting video clips, evocative stories, challenging questions, stimulating discussions, reflective exercises, interactive learning tasks, group projects, and in-situ learning experiences. Instead of lecture, alternative approaches such as dialogue education, action learning, and real-life problem-solving can be used. The more active and engaging the learning process, and the more effectively new information connects to previous learning, the more likely that meaningful learning will occur.

In the creation and implementation of coursework for the development of leaders, designers and instructors must consider the learners, content, and context before deciding upon learning approaches. Though many adults have been conditioned by traditional schooling to become passive ‘classroom’ learners, conscientious designers and trainers will seek to engage adults in active, participative, experiential learning with a view toward maximizing transfer of learning and increasing the likelihood of impact on the organization and its mission. The key question that should guide the church-based designer is: ‘What will result in the most effective learning?’

6.6.7.4 Developmental Relationships

Developmental relationships are one of the three most important factors in the development of top leaders (Wilson et al. 2011:4). McCauley and Douglas

¹¹¹ As section 4.3 indicates, Jesus used a wide variety of methods and learning experiences to facilitate the development of his disciples.

(2004:87-90) stressed that these empowering relationships are especially effective when they include the three key developmental elements of assessment, challenge, and support. Developmental relationships can take many forms, most of which were modeled by Jesus himself.¹¹²

Knowing the transformational impact of close relationships, Jesus invited the Twelve to be “with him” (Mark 3:14). Close association with respected spiritual leaders inspires emerging leaders and allows them to ‘catch the leader’s spirit’. This intimate relational environment enhances the effectiveness of modeling and provides excellent opportunities for meaningful interaction and impartation. Because the leader’s authenticity can be verified, vision and values are more easily transferred in such relationships and the potential for transformative learning enhanced.

The recent resurgence in the popularity of mentoring indicates its developmental value. McCauley and Douglas (2004:92) described mentoring as a “committed, long-term relationship in which a senior person (mentor) supports the personal and professional development of a junior person (protégé)”. Stanley and Clinton (1992:12) defined mentoring as “a relational experience in which one person empowers another by sharing God-given resources”. By transferring the ‘resource’, the mentor “facilitates empowerment or development” (Stanley and Clinton 1992:40). Mentoring can involve encouragement, sponsorship, growth challenges, coaching, guidance, feedback, counseling, accountability, role modeling, and even prayer support. Coupled together with coursework and challenging ministry assignments, mentoring can greatly enhance the development of emerging leaders.

Out of the resurgence in mentoring emerged the more specialized field of coaching. Leadership coaching usually involves a formal relationship in which a qualified coach works with an organizational leader in private sessions to help the individual improve his or her effectiveness, as well the effectiveness of a team or organization (Riddle 2012:31). Coaches use questions, assessments, and

¹¹² See section 4.3.6 - Discipleship, Apprenticeship, and Mentoring as Platforms for Leadership Development.

reflective exercises to help the leader to develop action plans to improve performance. The coach then evaluates progress and continues the process until the developmental goal has been reached, at which time the coaching relationship is terminated (Riddle 2012:31). Coaching is especially helpful for leaders transitioning to more challenging responsibilities. Hernez-Broome and Hughes (2005) found that leaders who receive coaching after participation in a leader development program tended to be more focused in forming developmental goals, more successful in achieving goals, and more likely to exhibit behaviors in keeping with leadership/management roles.

No church-based leader development approach would be complete without the creation of a 'learning community'. As Bickford and Wright (2006:4.2) noted, "Research on learning theory, how the brain works, collaborative learning, and student engagement has taught us that people learn best in community". A 'learning community' intensifies the level of interaction and engagement among learners — challenging assumptions, creating disequilibrium, provoking reflection, heightening accountability, and enhancing opportunities for development in the learning domains of being, knowing, and doing. In addition, as relationships develop, learning communities provide a sense of mutual encouragement and support. The very fact the Jesus himself developed the disciples in such a community speaks volumes.

Learning communities take many forms — peer co-mentoring groups, teams, networks, cohorts, and communities of practice, all of which tend to enhance development. Communities of practice¹¹³ are groups of people who share a common concern or passion and deepen their knowledge and expertise by interacting on an on-going basis (Wenger, McDermott, and Snyder 2002:4). Novices enter these communities on the periphery and gradually move toward a reproducing role as they grow in expertise.

The transformational power of developmental relationships is seen in the teaching and ministries of Jesus and Paul, the research of Bandura, and

¹¹³ For more information on communities of practice, see section 3.3.6.4 on social constructivism.

Goodwin's principle. Both Jesus and Paul had profound influences on those they trained. Almost 2,000 years later, Bandura's (1977, 1983, 1986, 1989, 2001, 2002) extensive research on social learning theory (social cognitive theory)¹¹⁴ confirmed the powerful influence social relationships have on learning. Perhaps Goodwin (1981) said it best: "Emerging leaders tend to rise up to the level of genuine expectations of older leaders whom they respect."

6.6.7.5 Developmental Experiences: Learning On-the-Job

Though the context of church leader development is quite different from the corporate world, the types of experiences that result in learning are not. Challenging job assignments¹¹⁵ tend to be the greatest source of learning for emerging leaders (Day 2001:599-600). What stimulates growth is not just the job, but the challenge! Ohlott (2004:154) stated that developmental experiences are most effective when people feel stretched, pushed out of their comfort zones, and required to think or act in a manner to which they are not accustomed. Research indicates that challenging job assignments help emerging leaders develop team-building skills, strategic thinking ability, and leadership skills (Day 2001:598). Interestingly, when assignments are fraught with challenging problems, dilemmas, obstacles, hardships, and risks, the potential for development is very high. However, so is the risk of failure! Church leaders need to use wisdom when assigning responsibilities to avoid long-term harm to the church or to the emerging leader. As exemplified in the training approach of Jesus¹¹⁶, when church leaders entrust emerging leaders with a responsibility, they must be willing to accept the risk associated with the assignment and view failure as a developmental opportunity. Apprenticed or closely supervised learning experiences reduce the level of risk while maintaining the level of challenge.

¹¹⁴ Social learning theory is examined in section 3.3.3.

¹¹⁵ Section 5.5.1 discusses the importance of challenging assignments in the development of leaders.

¹¹⁶ See section 4.3.13 on Jesus' approach to skills development.

As Ohlott (2004:154) noted, job assignments have the greatest developmental impact when they include not just the element of challenge, but also the key developmental elements of assessment and support.¹¹⁷ Difficult assignments provide wonderful opportunities for assessment. As emerging leaders tackle new challenges, they and their mentors, coaches, or supervisors are better able to assess strengths and weaknesses and identify areas in which growth is needed. Indeed, supportive engagement before, during, and after the assignment helps the emerging leader to identify important leadership lessons and consolidate learning.

In his theory on leadership emergence, Clinton (1989)¹¹⁸ highlighted the important roles that ministry challenges (both short-term tasks and long-term assignments) play in a leader's development. Emerging leaders must recognize that these challenges, though often assigned by a church or organization leader, ultimately come from God and have both contextual and developmental significance.

Early short-term ministry tasks tend to promote the development of initiative, faithfulness, loyalty, submission to leadership, spiritual gifts, and responsiveness to the Spirit (Clinton 1989:137-142). These tasks are usually supervised and conclude with some sort of evaluation, providing excellent opportunities for reflection. A valuable tool for assessing potential leaders, the ministry task is best used with development in mind.

Challenging ministry assignments are long-term in nature and contribute to spiritual, ministerial, and strategic formation (Clinton 1989:200). During a ministry assignment that involves a new context or set of responsibilities, leaders develop new insights and skills while leading and influencing others. Leadership ability, capacity, responsibility, and influence normally expand during ministry assignments. Spiritual gifts, relational skills, and team-building skills are also sharpened. Mentoring, feedback, and reflection during this learning process can be extremely valuable, giving insight not only on areas of needed growth, but on

¹¹⁷ Section 6.6.7.2 discusses how to make experiences developmental.

¹¹⁸ Clinton's theory is described in detail in his 1989 manual *Leadership Emergence Theory*.

future ministry direction as well. Interestingly, as Clinton describes them, ministry challenges include the three developmental experiences of assessment, challenge, and support.

6.6.7.6 The Use of Feedback

Research has indicated that feedback¹¹⁹ plays an important role in leadership development, especially as leaders increase in level of responsibility (Conger and Benjamin 1999:38-39). In order to grow, emerging leaders must seek feedback, identify areas for improvement, and develop a plan of action to address the identified needs (Curry 2012:15). However, feedback must also be provided by the organization as an intrinsic part of the developmental process. In particular, continual feedback through coaching or mentoring (especially by a supportive supervisor) plays a major role in successful leader development.

Input from respected leaders and associates is also of great value. A popular tool, 360-degree assessments utilize self-assessments and helpful input from colleagues, supervisors, and even subordinates on attitudes and behaviors important to the leader's role and the organization's future. Once results are compiled, a trained facilitator meets with the emerging leader to help him or her understand the results and establish a development plan to increase effectiveness (Chappelow 2004:59). When used correctly, this tool includes assessment, challenge, and support, the three elements that encourage growth. As with other developmental methods, feedback tools are most effective when integrated with other learning processes.

¹¹⁹ Gagné included feedback as one of his nine essential events of instruction (see section 2.3.1.2). Feedback plays a fundamental role in learning processes such as cognitive apprenticeships, communities of practice, and other forms of social learning (see section 3.3.6.4), as well as in active learning processes such as discovery learning (section 3.3.6.5) and dialogue education. Not only is feedback essential in order to assess the effectiveness of a learning design, it also assists the learner to identify and embrace changes necessary to reach the developmental goal. As Conger and Benjamin (1999:38-42) noted, feedback mechanisms often facilitate the kind of openness required for meaningful growth.

Both Jesus and Paul made extensive use of feedback. Jesus habitually interacted with the Twelve about their learning experiences; and significant portions of Paul's letters to Timothy take the form of feedback. For church-based leadership development processes to be effective, feedback mechanisms must be built in to the design.

6.6.7.7 The Value of Reflection

Reflection plays an important role in transformative learning¹²⁰ (Mezirow 1997:5-7). Potential and emerging leaders often hold underlying assumptions or 'frames of reference' which may not be accurate. These frames of reference have a direct bearing on perceptions of self, God, and others and directly influence attitudes, decision-making, and behavior. Whether spontaneous or preplanned, times of focused reflection after feedback sessions, dialectical discourse, disorienting experiences, and any other experience that creates disequilibrium can be of great benefit. For followers of Jesus, critical reflection on underlying assumptions often results in a transformed perspective as the Holy Spirit uses God's word to renew the mind.

As evidenced in his adaptation of Holland's two-track analogy (see figure 5.2), Clinton regards 'dynamic reflection' as a key integrating factor in the emerging leader's development. An interactive thinking process, dynamic reflection helps the emerging leader to make meaningful connections between cognitive/spiritual input, ministry experience, and spiritual formation, resulting in transformational growth (Clinton 1984:41).

To enhance the transformational impact of the church's leadership development processes, regular and timely opportunities for reflection should be built in to the design, especially when emerging leaders start or complete courses, engage in

¹²⁰ Transformative learning is examined in section 3.3.8. Willis considers reflection fundamental to all constructive learning processes (see section 2.3.8). Vella sees action with reflection as critical to effective learning in dialogue education (see section 2.3.9.1). Kolb and Jarvis both view reflection on experience as one of the key aspects of experiential learning (see 3.3.5.1).

learning processes that challenge worldview (such as intense dialogue or culturally challenging experiences), and undergo periods of transition.

6.6.7.8 Keep the Goal in Mind

Jane Vella's (2008:xxiii) comment on dialogue education summarizes the spirit of effective teaching and learning: "All that we do in dialogue education — all the principles and practices, all the strategies and technical aspects, all the design and materials, all the decisions — are toward learning". The apostle Paul echoed the same spirit when he wrote,

We proclaim Him, admonishing every man and teaching every man with all wisdom, so that we may present every man complete in Christ. For this purpose also I labor, striving according to His power, which mightily works within me (Colossians 1:28-29).

If church-based leadership development is to achieve its objectives, the conscientious designer must prayerfully and diligently seek to identify, utilize, and link processes that facilitate holistic, transformational development and the production of healthy and balanced spiritual leaders.

6.6.8 Incorporate Serious Ordered Learning

Church-based leadership development is not without challenges. Developing knowledgeable, theologically balanced leaders usually requires serious ordered learning. Unfortunately, churches often lack the qualified personnel and resources needed to offer credible theological training. In addition, certain churches hold theological training in disdain or have a resistance to 'programs', and are unlikely to accept the need for such ordered learning. Moreover, even when churches are able to compile theological learning processes, the training may be unintentionally or even intentionally skewed, resulting in an unbalanced theological perspective. Furthermore, a lack of exposure to other theological perspectives can result in a limited and even faulty spiritual worldview.

Local churches (or church networks) that opt for church-based leadership training need to consider how to develop and integrate serious ordered learning into their

developmental processes and programs in order to enable emerging leaders to achieve appropriate levels of competence in their understanding and application of scripture (Reed 2001:12). Such a project would require focused effort from the church's leadership team. Should the leadership team lack the ability or resources to develop a credible learning process, the church can make use of church-based training resources provided by organizations such as the Centers of Church-based Training or BILD International. A more viable option in the South African context might be to establish a partnership with another church already engaged in church-based training (such as Little Falls Christian Centre) or a 'church-friendly' distance learning institution such as South African Theological Seminary¹²¹.

To maximize effectiveness, church-based attempts at serious ordered learning need to be rooted in effective design¹²² and developed in accordance with recognized principles of adult learning. Whenever possible, the educational methodology used by the local church needs to be transitioned from the mere transmission of information to real life, contextually appropriate problem-posing, along the lines of CCBT's W.I.S.D.O.M. learning process (see section 5.2.2.3). Interest and engagement can be enhanced by using a variety of stimulating learning methods. Processing and learning can be accentuated by providing meaningful opportunities to engage in dialogue, work with content, make application to context, and reflect on personal application through journaling and mentoring. As Reed (2001:11) noted, in the overwhelming majority of cases, teaching would no longer be done by university professors. Instead, learning would be facilitated by "gifted and biblically qualified church leaders" (Reed 2001:11).

¹²¹ Located in Johannesburg, South African Theological Seminary (www.satsonline.org) is a theological distance learning institution offering accredited Christocentric, bible-based degree programs from certificate to doctoral level.

¹²² Nine 'user friendly' instructional design models are examined in section 2.3, with key questions to guide the design process highlighted in section 2.4. Webber's approach to design for transformational leader development in the local church is examined in section 5.3.3.

In serious ordered learning, careful attention must be given to the design of the curriculum. According to Reed (2001:11), the design and content should be informed by the “natural categories of Scripture and the cultural context of the church” (Reed 2001:11). Key understandings and effective application are the focus, not biblical or theological trivia. The last thing emerging leaders need is a meaningless exercise in boring and irrelevant theology. Instead of a ‘grading system’, a holistic, mentoring-based portfolio system like that developed by the Antioch School¹²³ can be utilized to assess progress. As with other aspects of a well-rounded church-based process of leadership development, serious ordered learning will be most effective when meaningfully linked to other learning experiences such as challenging research or ministry assignments overseen by a supportive supervisor or mentor.

6.6.9 Conduct Meaningful Evaluation

An important part of a successful leader development strategy, evaluation gathers relevant information with a view toward improving the effectiveness of the organization’s approach to leadership development (Hannum, Martineau, and Reinelt 2007:6-7). Though evaluation considers the progress of emerging leaders, the primary focus points are the leadership development design and processes.¹²⁴ Information gathered through a well-designed evaluation process enables leaders and designers to identify the strengths and weaknesses of a leadership development program and make positive changes that enhance long-term effectiveness, benefitting both leaders in training and the organization as a whole. Indeed, a well-conceived evaluation process can even enable senior leaders to ascertain the impact of leadership development on the organization’s success in reaching its goals. When used effectively, leadership development

¹²³ Information on the portfolio assessment approach can be accessed on the website of Antioch School (<http://www.antiochschool.edu/academicInfo/Assessment.html>).

¹²⁴ Evaluation is a fundamental part of the instructional design process. Every model reviewed in section 2.3 stresses the importance of evaluation in order to improve the effectiveness of learning designs and developmental processes.

evaluation enables an organization to “accelerate desired changes by being intentional about what is being achieved and why” (Hannum et al. 2007:7).

The design and implementation of an evaluation process is important. Evaluation is both an art and a science. Methods can be quantitative, qualitative, or both. Well-designed evaluation processes seek to establish a cause and effect link between a process or experience and an outcome. Care must be taken to make sure that evaluations measure what they claim to measure and that what they measure is useful, valid (truthful), and reliable (Hannum et al. 2007:15-16). Since certain types of development are difficult to assess empirically; wisdom has to be applied when considering evaluation criteria and methods.

For the evaluation of leadership development programs, Hannum (2004:16) suggested the use of a combination of methods in order to assess outcomes at different levels. In church-based leadership development programs, individual outcomes can be assessed through regularly scheduled meetings, end-of-stage evaluations, personal interviews, learning or change surveys, and observation of behavior. If the church employs a mentor-driven portfolio assessment system, that provides an excellent resource to assist with evaluation. Organizational outcomes can be assessed through return on investment (although this is subjective in a church context), ministry results, congregational surveys, analysis of organizational systems and processes, and statistical changes. In order to prevent poor decision-making, the evaluation team must ensure that there is a valid link between the leadership development initiative and the findings.

6.6.10 Practice Wise Selection

Clinton (1989:69) recognized leadership selection as a major function and responsibility of biblical leaders. Though, ultimately, God himself raises up leaders; leaders in the body of Christ are responsible to work with the Holy Spirit to recognize and assist in the development of those whom the Lord has selected.

Many problems with leadership development can be traced to unwise selection.¹²⁵ Poor selection and poorly defined selection criteria can negatively affect even the best development processes. Webber (2008a:105) lamented the fact that so many churches and theological institutions lack discretion in their selection of leaders to be trained. The selection of the Twelve was so important to Jesus that he prayed through the entire night, and made the selection public, even though he had already worked with the disciples for some time (Luke 6:12-13).

Humans tend to make selection decisions on the basis of appearance, talent, outer qualifications, or even simple availability. But as God warned Samuel; we are not to make selection decisions on the basis of outer 'qualifications'; "for God sees not as man sees, for man looks at the outward appearance, but the Lord looks at the heart" (1 Samuel 16:7). Hence, prayerful sensitivity to the Holy Spirit is vital when selecting potential or emerging leaders for training. As Webber (2008a:105-117) noted, those ripe for selection will evince a vibrant and growing relationship with God, a desire to serve God and others, the fruit of the Spirit, early manifestations of leadership gifts, a sense of calling, respect for authority, a willingness to accept responsibility, and a hunger to learn. In addition, just like Timothy (Acts 16:1-2), potential trainees are likely to have a good reputation in the church.

Selection for leadership development must never be taken lightly. When the wrong type of person is selected, no matter how well intended or designed, the 'right process' is no longer the right process.

6.7 Critical Success Factors

Critical success factors are specific supportive elements that are essential for a project's success. For leadership development to succeed in a local church, certain factors have to be in place. Of prime importance, initiatives in the local

¹²⁵ Selection in the New Testament is examined in sections 4.5.4 and 4.7. The relationship between selection and effective socialization of vision and values is considered in section 5.5.4.2.

church must align with God's purposes for the church. Church leaders seeking to raise up leaders in obedience to God's word need the clear guidance and supernatural enablement of the Holy Spirit. Any church-based project to develop leaders must be bathed in prayer. The failure to align with and depend upon God can have serious consequences. As the Lord Jesus warned, "Apart from me, you can do nothing" (John 15:5).

Research among secular organizations has indicated that strong support from the organization's top leadership level is the single most important factor for long-term success in leadership development initiatives¹²⁶ (Effron et al. 2005, Day and Halpin 2001, Bersin 2008, Buus 2005, Curry 2012). Indeed, when top leaders 'champion' such a project and devote time and effort to its design and implementation, the likelihood of success is extremely high (Day and Halpin 2001:viii). Active participation by top leaders in the training and mentoring of emerging leaders makes success even more probable. In local churches, this means that the top influencer(s), whether the senior pastor, eldership, board, or steering team, must take ownership of the leadership development process and be actively involved in its design and implementation.

Top level support virtually guarantees that the second critical success factor will be in place. For the leadership development process to achieve long-term success, the development of leaders must be directly integrated into the vision and strategy of the organization. Local church leaders need to embrace the biblical priority of leadership development and integrate it directly and prominently into the church's vision and strategy.

Support from top leaders and integration into the organization's vision and strategy increase the likelihood that the third critical success factor will be provided. Operating a successful leadership development initiative requires organizational support. Both organizational infrastructure and organizational culture must be geared to support the program, processes, and participants. Time, personnel, funding, facilities, and resources must be committed to enable a

¹²⁶ See section 6.4.1.

comprehensive program to function effectively. If local churches want to be successful in the development of emerging leaders, support for every aspect of the process must be provided.

As Leskiw and Singh (2007:451) observed, for the successful implementation and management of a leadership development program, the right structures and systems must be in place. When the necessary infrastructure is in place and functioning effectively, it is a good indicator that leadership development is embedded in the organizational culture and that support and involvement from top leaders is sufficient.

6.8 Cultural Considerations

Though the recommended practices detailed in this chapter could be applied to churches almost anywhere in the 'Western' world, this research project has been conducted with South African churches in mind. In particular, consideration is given to churches that have embraced leader-intensive ministry models such as cell-based churches, churches that utilize small groups, and multi-congregational churches.

With the end of apartheid and the ongoing shifts in community demographics, many of South Africa's churches are becoming increasingly multicultural. In light of these recent shifts, consideration is being given to the role of culture and diversity in the design and implementation of church-based leadership development initiatives.

As Paul wrote to the Colossian church, in Christ, "there is no distinction between Greek and Jew, circumcised and uncircumcised, barbarian, Scythian, slave and freeman, but Christ is all, and in all" (Colossians 3:11). In other words, national, religious, cultural, and class distinctions are removed in Christ. As Paul stated, "from now on we recognize no one according to the flesh" (2 Corinthians 5:16); for, "if anyone is in Christ, he is a new creature" (2 Corinthians 5:17), literally a new 'creation', of a kind that never existed before. As Walvoord and Zuck (1984:681-682) noted, "normal human distinctions are overruled and transfigured by one's union in Christ. All barriers are destroyed in Christ, and all

believers are truly 'created equal'." As such, we are to treat each other accordingly (Colossians 3:12-17).

In spite of this wonderful spiritual truth, religious, ethnic, and cultural conflict, as well as class distinctions, were not uncommon in the early church. We would be unwise to assume that things are any different today. Research by Livers and Caver (2004:304-330) indicated that organizations in multicultural settings often espouse policies of equality but essentially ignore issues of difference, operating under "an assumption of similarity" while "a reality of difference" permeates the organization. Similarly, at a personal level, organizational leaders tend to assume erroneously that, if they work with others on a regular basis (regardless of cultural or ethnic background), they have an accurate understanding of their perspectives, feelings, and motivations (Livers and Caver 2004:326). This illusion of similarity, fairness, and equality in the organizational culture tends to mask the perceptions and challenges members often experience in a culture at variance with their own. It also tends to blind majority leaders to subtle prejudices rooted in faulty assumptions about others — prejudices that can have a direct bearing on assessments and developmental opportunities extended to potential leaders from other cultures or ethnicities.

For multicultural churches engaged in leadership development, an awareness of cultural differences is of great value. Differing perspectives on the nature of leadership, leadership distance, protocol, interpersonal relationships, loyalty and respect, the place of a person in the community, the definition of success, work ethic, the concept and value of time, short-term performance versus long-term credibility, self-sufficiency versus co-subsistence, and the handling of conflict can all complicate leadership development in a multicultural situation. Moreover, the emergence of a generation of seemingly 'westernized' black South Africans complicates the situation. Many emerging African church leaders find themselves accommodating Western thinking and organizational culture while still living in an African world.

To succeed in multicultural leadership training initiatives, churches need to understand that culture is real and differences do matter. Leaders must make the effort to learn about other cultures, get to know individuals in that culture,

encourage potential and emerging leaders from other cultural backgrounds to be open about their feelings, and solicit feedback regarding their own attitudes and behavior (Livers and Caver 2004:325-327). When it comes to building understanding, there is no substitute for authentic relationship.

Wherever possible, church-based leadership development programs in South Africa need to train leaders *in* a multicultural context *for* a multicultural context. Open and honest discussions on multicultural dynamics must be part of the training. In addition, leadership selection processes must be carefully evaluated to avoid culturally biased selection based on Western standards as opposed to biblical standards. The same holds true for assessment processes, challenging assignments, and the types of support offered.

Hoppe (2004:358-360) provided valuable insight to churches seeking to develop leaders in a multicultural environment. Church leaders need to be well aware of the cultural assumptions, values, and beliefs underlying their approach to leadership and leadership development. Conversely, they also need to learn as much as possible about other cultural perspectives. No design should be undertaken without assistance from culturally perceptive individuals. When engaged in cross-cultural development, the underlying assumptions and values behind the design (and any exercises or assignments) should be included in the introduction. When conducting assessments or facilitating exercises, leaders and trainers must be aware of possible problems with language, misunderstanding, and cultural bias. Sensitivity needs to be shown when designing and implementing challenging learning experiences; and participants must always have access to appropriate levels of support. For long-term multicultural training programs to work, church leaders, designers, trainers, mentors, and emerging leaders must commit to meeting on middle ground. As Paul exhorted the Roman church,

Let love be without hypocrisy. Abhor what is evil; cling to what is good. Be devoted to one another in brotherly love; give preference to one another in honor; not lagging behind in diligence, fervent in spirit, serving the Lord; rejoicing in hope, persevering in tribulation,

devoted to prayer, contributing to the needs of the saints, practicing hospitality (Romans 12:9-13).

Well aware of the challenges of teaching and training in a multicultural environment, Heekap Lee (2012) suggested an intriguing educational model based on biblical concepts of Imago Dei (humankind's creation in God's image), reconciliation in Christ, the development of cultural competence, contextualized pedagogy, and intentional praxis, all with a view toward the establishment of a community of 'shalom'. Such a model could easily be adapted for use in church-based leadership development.

6.9 A Suggested Design Template

The recommended practices detailed earlier in this chapter serve to undergird the design of effective leadership development processes in the local church. However, churches might benefit more directly from a step-by-step guide to the actual design process. Based upon the recommended practices, and drawing upon research from previous chapters, this section provides church leaders with a suggested template for the design of church-based leadership development initiatives. The first part of this section contains a detailed explanation. A concise template is featured at the end of the section.

Before the design process can begin, a committed, resourceful, and competent team must be assembled. The team should consist of the project leader (someone with both the passion and competence to drive a leader development initiative), the chief designer (if it is not the project leader), church leaders who will serve as teachers, trainers, and/or mentors, the senior pastor/elder (or his or her designated representative), a senior church administrator, and a couple of emerging leaders to provide input. Church members or outside consultants with experience in adult education and/or leadership development may also prove helpful.

6.9.1 An Overview of the Process

According to LeaderSource founder Malcolm Webber (2009:15), designing a leader development initiative is similar to planning a journey.¹²⁷ Five key sets of questions must be considered.

- (1) Where are we going? What is the intended 'destination? What characterizes a properly developed Christian leader? What are the developmental goals? At the end of the process, what must emerging leaders know, be able to do, and be like?
- (2) Who is going? Who are the participants in this journey and what are they like?
- (3) Why is this training necessary? What situation or need calls for this process?
- (4) How will we get there? What instructional strategies, content, and learning processes facilitated by which personnel with what resources will best accomplish the developmental goals?
- (5) How will we know when we have arrived? How can the achievement of learning be best assessed?

The design process begins with the destination or end goal in mind — the type of leader the church seeks to develop. The design team must begin by prayerfully grappling with a question. In light of the teaching of scripture, what characterizes a mature, spiritually healthy, well-equipped leader? The answer to this question becomes the developmental goal of the leader development initiative. Once the destination or goal is defined, the designer must identify who is going on the journey. Who is to be developed? An assessment of those selected for development in light of the developmental goal leads to the next two questions. What input, processes, experiences, and contexts are required to produce leaders of this nature; and how will we know when they have 'arrived'? Drawing upon scripture, research, and experience, designers must determine the elements required to develop the type of leaders envisioned. In addition, a useful

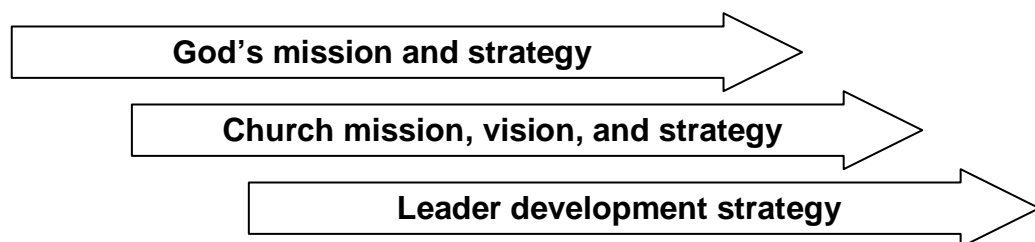
¹²⁷ See section 5.3.3.

means of assessment must be chosen. Once the various aspects of the ‘journey’ are identified, and once agreement has been reached on appropriate means of assessment, the way forward must be planned or ‘mapped’. In cooperation with the Holy Spirit, a design must be prayerfully created that integrates the various elements of the developmental journey into an effective and efficient design that charts a clear but flexible pathway to the desired destination. With support from top leaders and the church itself, the design is then diligently implemented in active dependence upon God, guiding the emerging leaders through the various learning experiences toward the developmental goal. Periodic evaluation must be undertaken in order to improve the developmental design and processes.

6.9.2 Create Alignment

Before the design process can begin, alignment is required. The church’s leadership development strategy and processes must be brought into alignment with *and* be integrated into the church mission, vision, and strategy; and the church mission, vision, and strategy must be brought into alignment with God’s purposes, priorities, and strategies for the church as revealed in scripture.

Figure 6.5: Creating Alignment



Though the terms ‘mission’, ‘vision’, and ‘strategy’ are variously defined, specific meanings are applied to these words for the purposes of this template.

- Mission defines an organization’s purpose — why it exists and what it does.
- Vision describes a future state, what things will be like as the mission is fulfilled.
- Strategy is how an organization seeks to execute its mission and thus fulfill the vision.

6.9.2.1 Important Questions on the Mission and Strategy of the Church

Before any design can be undertaken, church leaders must prayerfully consider several important questions.

The Mission of the Universal Church

- Based upon scripture, describe your understanding of God's mission for his Church around the world.
- What biblical strategies have the Lord Jesus and the Holy Spirit given to the Church to fulfill this mission?
- How should the mission and strategies entrusted to the Church by the Lord express themselves in the priorities and practices of the local church?

The Mission of Your Local Church

- What is the mission statement of your church? How closely does the mission of your church align with the purpose of the church as described in scripture? What adjustments must be made to create greater alignment?
- What vision compels you? Describe the envisioned future of your church (what things will be like as the mission is being fulfilled). Avoid thinking in terms of size and buildings. Focus rather on what will be happening among the people, in the community, and in the world.
- What strategies will the church employ to accomplish this vision and fulfill your God-given mission?

Leadership Development in the Church

- What role(s) do (will) emerging leaders play in the church's strategy, envisioned future, and God-given mission? Be specific.
- What role does (will) leadership development play in the fulfillment of the vision and mission of the church? How does (will) the development of emerging leaders align with and accentuate your church's mission, vision, and strategy?

- Based upon scripture, what responsibility does the church have toward its emerging leaders? Who is responsible to see that this responsibility is fulfilled?
- How will you realign your church priorities and practices in order to facilitate more intentional, purposeful, and effective processes of leader development?

6.9.2.2 Adjust the Church's Philosophy of Ministry

Realignment in a church's mission, vision, and strategy may require the church's philosophy of ministry to be updated. A biblically aligned philosophy of ministry provides parameters that aid church leaders in the determination of ministry priorities, goal-setting, and strategic planning. As Westing (1993:65-77) suggested, a ministry philosophy should be informed by a biblical understanding of the church, God-given church vision, the surrounding context and culture, church history and culture, strengths and limitations of the church, and honest evaluation. Ministry philosophies are most effective when scriptural, simple, transferable, and flexible. Before proceeding to the next stage of design, evaluate and update the church's ministry philosophy as necessary.

6.9.3 Define the Developmental Goal(s)

The first real step in the design of an effective leadership development strategy is to clarify the developmental goal(s) (Webber 2008a:18-21). In the same way Webber did¹²⁸, the church's leadership and design team(s) must come to an agreement on what characterizes the type of spiritual leader they want to develop. Conger and Riggio (1999:33) found that a lack of clarity about what leadership is and the kind of leaders to be developed generally results in poorly focused and ineffective developmental processes. The clearer the goal, the easier it is to determine the best processes to use for specific emerging leaders in a particular context. The developmental goal must be holistic in nature, incorporating aspects of being, knowing, and doing — or heart, head, and hands

¹²⁸ See section 5.3.3.3 on the '5C' leadership model.

as Forman et al. (2004:62-63) prefer. Spiritual and ministerial formation are the primary goals. Stated another way, consideration needs to be given to the development of spiritual and emotional maturity, Christlikeness in character, biblical and other important types of knowledge, and the giftedness and skills essential for effective ministry and leadership in the body of Christ. A number of characterizations or models of a well-developed spiritual leader have been proposed; but it is best if church leaders work through this and compile their own description based upon scripture, the church mission and vision, and their unique ministry context.

The following questions can help church leaders to define their understanding of an ideal Christian leader.

- What characterizes a spiritually healthy, mature, and well-equipped leader?
- What levels of commitment, consecration, character transformation, and capability are required?
- What ministerial, relational, and leadership skills must emerging leaders possess to function effectively in the church community, ministry context, and surrounding culture(s)?
- What specific factors will indicate that sufficient spiritual and ministerial formation have occurred?

Forman et al (2004:62-63) emphasized the importance of developing servant leaders who are biblically wise, Christlike in character and compassion, and skilled in equipping others. Webber (2008a:18-19) stressed the importance of developing 'healthy' Christian leaders who know Christ intimately, pursue and practice healthy relationships in biblical community, walk in integrity, have clear God-given vision, and possess the knowledge, gifts, and skills necessary for effective ministry.

From this point forward, everything the design team does is with a view toward the development of the type of leader you describe.

Table 6.1: Holistic Development Goals

Aspect	Goal	Characteristics
Being (Heart)	Christlikeness	Spiritual formation, character, compassion, life purpose
Knowing (Head)	Biblical wisdom	Applicable knowledge of God's word, knowledge of people, culture, and context
Doing (Hands)	Capabilities	Giftedness and skills needed for effective relationships, ministry, leadership, and development of others

6.9.4 Determine the Selection Criteria and Process

Dr. J. Robert Clinton (1989:14) stated, “Effective leaders recognize leadership selection and development as a priority function”. However, before any development can take place, potential leaders must be selected. Wise selection is critical to the success of leadership development initiatives. Understandably, human beings tend to make selections based upon observable criteria. However, scripture offers several enlightening passages that demonstrate the importance of sensitivity to the Holy Spirit when selecting potential leaders.

Ultimately, God himself raises up leaders; but it is our responsibility to work with him in this process (Webber 2008a:40). When the apostle Paul met with the Ephesian church leaders in Acts 20:28, he acknowledged that it was the Holy Spirit who had appointed them as overseers in the church. However, it is likely that many of these elders were matured under Paul's earlier ministry in Ephesus (Acts 19:8-10).

In leadership selection, discerning God's perspective and purpose is essential. When sent to anoint a new king for Israel, the prophet Samuel had to be reminded that God makes selections not on the basis of outward appearance but on the condition of the heart, which only the Lord himself knows (1 Samuel 16:7). Before selecting the Twelve for intense training as apostles, Jesus himself spent

an entire night in prayer (Luke 6:12-13). If Jesus invested so much time and effort consulting the Father before selecting trainees, how much more should we?

Further insight on selection can be gained from the examples of Jesus and Paul.¹²⁹ Jesus originally called a number of people to follow him as disciples. Others sought Jesus out. Over time, he called certain followers to increase their level of commitment. This gave Jesus and these specific disciples an opportunity to evaluate one another. When the time came to train a specific team to carry on his ministry, Jesus prayerfully selected the Twelve from among those who had already demonstrated a level of commitment and a willingness to learn. Jesus did not make choices based on status, wealth, education, or competence. He selected men who were willing to follow and willing to learn, men who were looking for the coming of God's kingdom. Most importantly, his leadership selection choices were bathed in prayer.

The apostle Paul's selection of his best-known protégé, Timothy, was somewhat different. Paul was undoubtedly exposed to Timothy on a previous visit to Lystra and, based on the guidance of the Spirit and his excellent reputation in the church, selected him as a helper (Acts 16:1-2).

It is important to note that character, commitment, faithfulness, and 'teachability' outweigh the importance of 'talent' and charisma in the selection of potential leaders. Paul's criteria for the selection of church leaders in 1 Timothy 3:1-13 and Titus 1:5-9 emphasize the importance of character, relationships, and reputation, as well as competent operation in requisite spiritual gifts and ministry skills.¹³⁰ These qualifications characterize a mature leader and serve to inform the design of leadership development processes.

With this biblical perspective as a backdrop, and in light of the church's vision, mission, and strategy, prayerfully determine the selection criteria and process that will be applied in the leadership development initiative.

¹²⁹ See sections 4.5.4 and 4.7.

¹³⁰ These qualifications are examined in detail in section 4.7.2.

6.9.5 Conduct a Threefold Analysis

Three types of analysis are important before deciding upon a design.

6.9.5.1 Analyze the Organization's Leadership Needs

As a leadership team, identify the critical leadership needs of the church both now and in the foreseeable future. Include leadership needs at every level of the church.

6.9.5.2 Conduct a Learning Needs and Resources Assessment

The purpose of a learning need and resources assessment is “to find out more about the learners, their context, and the situation” for which you are designing (Goetzman 2012:18). Every learning process needs to demonstrate respect for the learners, and an assessment of this nature assists designers and facilitators to recognize and appreciate the uniqueness of each learner. As Goetzman noted (2012:18-19), a learning needs and resources assessment involves a analytical overview that helps designers/facilitators evaluate assumptions about the learners and proposed learning event(s), make informed decisions, and create a design that is appropriate, relevant, engaging, challenging, and useful for the learners.

Smith and Ragan (1999:43) stated that understanding the learners is essential for the design of effective learning processes. As Vella (2008:19-20) noted, a learning needs and resources assessment invites a pre-course response from emerging leaders in an effort to discern their level of knowledge and experience and what they bring with them into the developmental process.

Using a simple *ask, study, observe* process, designers/facilitators can discover helpful information about emerging leaders that enhances the effectiveness of the design process. Designers should ask learners and those who know them about expectations, previous learning, areas of interest and concern, and preferred learning approaches. Surveys, interviews, informal dialogue, and questionnaires can all be used to garner important information about potential leaders. This

process enables designers and instructors to grasp the emerging leader's level of understanding and experience, clarify expectations, and adjust learning processes. The more comfortable participants are in this process, the higher the quality of information gleaned.

Understanding the extent of prior learning is critical to the successful development of learning experiences. New learning must build on existing knowledge and be taught in such a way that the new can be linked to the old.¹³¹ Designers should take time to study reports, documents, research, learning methodologies, and other designs that might assist in the creation of an effective developmental process. In addition, potential leaders should be observed and studied in context to gain insight on their ways of interacting, potential attitude challenges, and levels of competence. Rather than being a once-off process, this type of assessment is best continued throughout the developmental period.

It is important to note that the learning needs and resources assessment *informs* the design process; it does not form it. Though potential leaders certainly have a consultative voice in expressing learning interests, those responsible for the overall design have the final say on the design of learning processes.

6.9.5.3 Assess Organizational Readiness

Implementing a leadership development initiative takes resources. Personnel, facilities, equipment, materials, and funding are all required. Church leaders need to make an initial assessment of what resources are available or can be accessed before undertaking serious design. In addition, the organizational culture must be assessed. Will church staff, volunteers, and members support the leadership development initiative?

¹³¹ As cognitive load theory stresses, building on prior learning is critical for the management of intrinsic load and the maximization of germane load, thus enhancing the potential for effective learning. See section 2.2.2.4. Gagné's nine events of instruction (section 2.3.1.2) also emphasize the importance of assessing and linking new learning to prerequisite knowledge. In addition, Smith and Ragan (section 2.3.3.1) strongly recommend that specific prior learning be assessed before any design is undertaken.

6.9.6 Create a Supportive Framework

A comprehensive approach to the development of emerging leaders requires a supportive framework. Church leaders must discuss and agree upon three commitments essential to the creation of this type of framework.

Research indicates that the success of leadership development initiatives is directly linked to the level of commitment, involvement, and support demonstrated by top leaders. (Effron et al. 2005, Day and Halpin 2001, Bersin 2008, Buus 2005, Curry 2012). Church leaders must be strongly committed to the leadership development initiative. At this preliminary stage, it is important for church leaders to discuss among themselves anticipated levels of involvement. In particular, who will be responsible to oversee and drive the design of the leadership development initiative; and who will drive the leadership initiative itself?

Designing and operating a leadership development initiative also requires organizational support. Church leaders must come to an agreement on how to gear church infrastructure and culture to support the program, processes, and participants. Time, personnel, funding, facilities, and equipment must be made available for the process to function effectively.

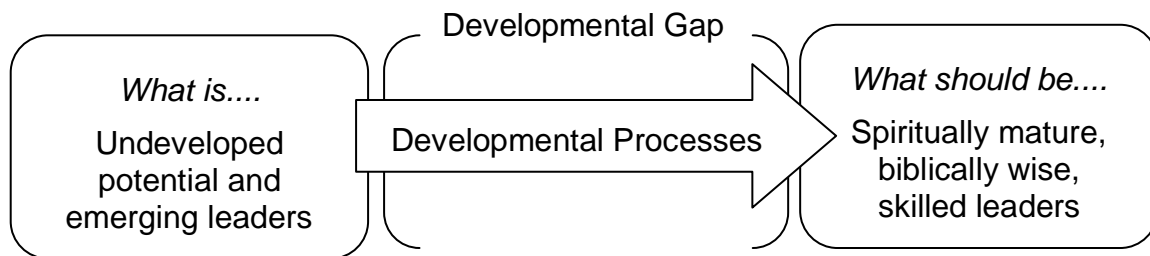
A third area of support focuses upon the emerging leaders themselves. Undertaking a lengthy, in-depth, multifaceted learning process can create stress for individuals and their families. If needed, church leaders (or their designated representatives) must be prepared to offer spiritual, emotional, psychological, and practical assistance when needed. Provision for regular assessments and support should be built in to the overall design of the leadership development initiative.

6.9.7 Determine the Most Appropriate Developmental Processes

At this stage, real design begins. After considering the learning needs and resources assessment, available church resources, and contextual issues, the design team must prayerfully endeavor to determine the most effective and efficient way to accomplish the developmental goal(s) specified in section 6.9.3.

Even as a factory starts with raw materials and, through a series of carefully designed and sequenced processes, produces a useful, high quality product, so church leaders can help facilitate the development of emerging leaders into spiritually mature, Christlike, biblically wise, well-equipped leaders by guiding them through appropriate developmental processes.

Figure 6.6: The Role of Developmental Processes



In approaching this step, the design team must ask themselves, “In this context, with these emerging leaders, which processes in what sequence will best produce the desired end results in a timely and cost effective manner? What processes will facilitate the development of these emerging leaders into spiritually mature, biblically wise, appropriately skilled leaders who can fulfill their God-given calling and meet the leadership needs of the church?” Though there is no ‘right’ way to develop leaders, both the scriptures and recent research provide excellent insight on the various processes that promote development.

6.9.7.1 Promote Transformation by Creating the Right Context

When designing leadership development programs, most church leaders think in terms of *content* — knowledge that emerging leaders must learn. Content, of course, plays a very important role in the development of leaders. However, even a cursory glance at the gospels reveals that Jesus did far more than communicate information to his disciples. He employed a transformational process.

Based upon observations from scripture, Webber (2008a:9-12) noted that Jesus intentionally included four integrated dynamics in his approach to leader development.¹³² He communicated transformational *content* (the words the Father gave him to speak) through a variety of engaging instructional methods; but he also created a transformational *context* by providing an authentic spiritual environment, a relational web, and an experiential learning process. A spiritual environment is characterized by authentic encounter and relationship with God through the Holy Spirit. A relational web involves close association between a mature spiritual leader and a relatively small group of emerging leaders who are committed to walking together in intimate community. It is in this learning community that much of the transformative learning will take place. An experiential learning environment is created when members of this relational web learn through apprenticeship, challenging assignments, and other in-service, 'on-the-job' experiences in the process and context of real life and ministry. To encourage transformation, therefore, church leaders must consider how they can integrate spiritual, relational, experiential, and instructional dynamics into the developmental design.

6.9.7.2 Emulate the Approach of Jesus

In Matthew 28:18-20, Jesus commanded the apostles to continue the developmental process he had started with them three years earlier. It was through this process that they had developed from mere followers into well-equipped apostles. As they had been discipled and developed by Jesus, they were to disciple and develop others. The developmental process used by Jesus¹³³ was characterized by the following.

- Handpicked trainees chosen after intense prayer.
- A clear developmental goal
- Training in mission for mission (in context, in-service, on the job)
- With-ness, close association in public and private contexts

¹³² Webber's four dynamics are described in section 5.3.3.4.

¹³³ The developmental approaches used by Jesus and Paul are examined in section 4.3.

- Modeling — leading and teaching by example
- Learning in intimate team/community setting
- Apprenticing/mentoring
- Engaging, relevant, paradigm-shifting instruction using a variety of effective teaching methods
- Balanced emphasis on character, knowledge, and skill
- Increasingly important and challenging assignments
- Assessment and feedback
- Opportunities for reflection
- Intercessory prayer
- Release into recognized ministry/leadership when ready

A practice largely missing in many of today's leadership development programs, the concept of 'with-ness'¹³⁴ was central to the developmental strategy used by Jesus. When Jesus selected the Twelve, he chose them that they might be "with him" (Mark 3:14). It was in this context of 'with-ness' that most of the disciples' development took place. Through this close association, the disciples were able to observe Jesus' private life, interact with him intimately, and 'catch his spirit'. Church leaders seeking to design and implement leadership development initiatives must be willing to allow emerging leaders close access to their lives. They must use these times of intimate association to serve as role models and mentors, demonstrating godliness in their private lives, developing authentic relationships, engaging in relevant discussions, and building into the lives of emerging leaders.

In Mark 3:14-15, not only did Jesus select the Twelve to be "with him", he intended to train them and entrust them with ministry responsibility. For church-based leadership development initiatives to be effective, there has to be a commitment not only to equip emerging leaders for ministry, but to entrust them with ministry responsibility¹³⁵ as well. Failure to do so short-circuits the development process.

¹³⁴ Jesus' practice of 'with-ness' is discussed in section 4.3.8.

¹³⁵ Zuck (1995:174), Clinton (1989), Webber (2008a:9-10), McCall and Hollenbeck (2002:12), and

Another vital element missing in many leadership development initiatives today, the ‘apprentices’ of both Jesus and Paul were trained in mission for mission by leaders on a mission. Recapturing this sense of training in mission will do much to impel a return to passionate, focused leadership development in the local church.

6.8.7.3 Utilize Evidence-backed Developmental Processes

Research indicates that emerging leaders learn best through three essential processes — challenging job assignments (such as ministry tasks and assignments), developmental relationships (such as apprenticeship and mentoring), and, to a lesser extent, relevant, well-designed coursework and training (Wilson et al. 2011:4).¹³⁶ Though on the job, in-service learning contributes most to the development of leaders, and developmental relationships provide essential modeling, mentoring, and coaching, the value of courses for emerging Christian leaders should not be underestimated. Well-designed courses often provide the essential biblical foundations needed for spiritual life and ministry and the development of biblical wisdom. Courses also have a significant ‘spill-over’ effect when linked to other learning experiences. Integrating challenging job assignments, developmental relationships, and well-designed and executed courses makes developmental processes especially effective.

Not every experience promotes development. The Center for Creative Leadership discovered that three elements are especially important if experiences are to be ‘developmental’ (Van Velsor and McCauley 2004:2-12). Those elements are assessment, challenge, and support.¹³⁷ When an emerging leader is stretched by a job assignment or problem-solving situation, receives helpful feedback and takes time to reflect, and benefits from appropriate

Wilson et al. (2011:4) all stress the importance of challenging ministry/job assignments in the emergence of leaders.

¹³⁶ See section 5.5.1 on the 70-20-10 principle.

¹³⁷ See section 6.6.7.2 on what makes experiences developmental.

relational and organizational support throughout the process, the experience is far more likely to be developmental.

6.9.7.5 *Make Courses Effective*

Instruction formed a foundational part of Jesus' approach to the training and development of the Twelve.¹³⁸ Though leadership skills often develop best through experience, knowledge is often gained through instruction and dialogue. In church-based leader development, serious ordered learning is an important component of the leader development process. However, reliance on a typical teacher-centered, content-driven approach to course design often proves to be ineffective. Designers and 'teachers' must understand that the presentation of large amounts of content is not the goal. This kind of 'dump truck' mentality rarely accomplishes the developmental objectives. Adult education veteran Jane Vella (2008:xvi) once commented, "The end of teaching is learning"; and, *learning* should be the primary focus of instructional processes. Contemporary churches often place emphasis on 'good teaching'; but teaching is at its best when it results in 'good learning'!

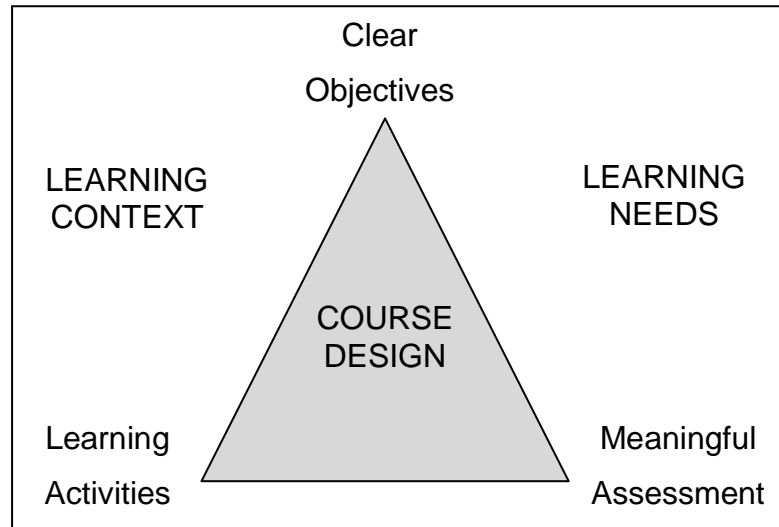
What can churches do to enhance learning in courses and other instructional events? Effective course design involves three key elements: clear objectives (often labeled learning outcomes), appropriate learning activities, and meaningful assessment. These are set against the backdrop of the learning needs and the learning context.

Gleaning from earlier chapters on instructional design and adult learning gives us insight into the elements that contribute toward effective course design and execution. Instruction/coursework without clear objectives makes design difficult. Clear objectives describe what the learner will know and/or be able to do once the instructional event is complete. Objectives are often structured on a 'when, who, what' basis. For instance, a learning objective for a course on evangelism might read, "By the end of this course, participants will have memorized ten

¹³⁸ Section 4.3.10 discusses the teaching ministry of Jesus.

biblical passages useful in evangelism and be able to share the gospel confidently and competently with another person”.

Figure 6.7: Elements of Effective Course Design



Once learning objectives are clear, the best processes to achieve the objectives can be discussed and designed. To be effective in accomplishing the learning objectives, learning activities must consider the learners, the content, and the context. The design should ensure that instruction is engaging, relevant, interactive, participative, and practical. Sequence is important, as is reinforcement. New information should be linked to previous learning. Start by anchoring to the known before launching into the unknown. Learning should move from the simple and familiar to the new and more complex. Learners should be provided with opportunities to work with the knowledge and apply it in context, either in a simulated environment or in real life situations. The more personally relevant and immediately useful the content is, the more easily it will be learned. The best learning designs are multifaceted, incorporating a variety of methodologies such as lecture, modeling, the use of various media, discussion, open questions with dialogue, group exercises, research, problem-solving, guided discovery, and story-telling — all designed to challenge thinking, provoke authentic learning, and increase the likelihood of transfer to context.

Church leaders should invest time researching course-based learning approaches. Global Learning Partners¹³⁹ (Goertzman 2012:70-72) uses a '4A' approach to structuring learning.

- Anchor — Use an open question, group discussion, dialogue, story-sharing, or another exercise to anchor (or link) new information to the learner's previous experience. Linking to previous experience or learning creates a sense of relevance and increases the likelihood of learning. Research shows that this is especially effective if the link is emotional in nature, such as sharing about a meaningful or emotional experience relating to the subject.
- Add — Add new but vital information, inviting learners to engage with or respond to new material by identifying the content that is most helpful or relevant to their situation. Not only does this create personal relevance, it also makes the learner an active participant in a meaningful learning process. When it comes to content, 'more' is not better. A good question to ask before adding new content is, "Why must these emerging leaders learn this?" Identify and utilize content that is relevant, helpful, and applicable.
- Apply — Provide an opportunity for learners to work with the content in a meaningful way through problem-solving and other exercises that involve application to context.
- Away — Ask learners to make a commitment to new attitudes or behaviors through written responses as part of a reflection exercise, followed by verbal commitments to members of their group or other people who can hold them accountable.

A proven approach utilized by the Centers of Church-based Training, Miller's (2010, 2011) W.I.S.D.O.M. learning process¹⁴⁰ is designed to develop biblical wisdom. Rooted in adult learning theory and tested in a number of cultures, this six-step process employs a problem-solving methodology and will not work with

¹³⁹ A detailed explanation of the 4A model is available at <http://www.globalearning.com>.

¹⁴⁰ The W.I.S.D.O.M. learning process is described in greater detail in section 5.3.2.3.

the learning of mere facts. An interactive process, prayer and dependence upon the Holy Spirit undergird Miller's approach. The process is encapsulated in the following steps.

- Work the issue. Identify and understand the problem. What is really at stake here? Articulate the issue as simply and accurately as possible.
- Investigate scripture. What does God say? Locate and study passages that relate to the issue. Derive principles based upon your understanding of the passages.
- Seek counsel. What do wise people say? Utilize a variety of resources to garner perspective from experts in the field.
- Develop your response: What do I think? After identifying the problem, studying relevant scripture, and consulting expert resources, formulate a response or way forward.
- Openly discuss the issue with other believers. What do we think together? Working as a group, believers inspired by the Spirit of Truth can often generate ideas and wisdom beyond the capability of an individual. Through prayerful interaction, believers sharpen and bring out the best in one another.
- Move to action. Take steps to address the issue. What will I/we do? Work with others to whom you are accountable to resolve the issue by applying biblical wisdom to your life or context.

Whichever learning processes are used, adult learners should be treated as adults. Adults bring with them their own ideas and experience. They appreciate respect and the opportunity to share ideas and participate in their own learning. In addition, adults appreciate an instructional approach that is engaging, interactive, and practical. If authentic learning is to occur, they must have the opportunity to work with content in a meaningful way. Adults especially value coursework that has relevance and immediate application to life and ministry.

Another important but often neglected aspect of the learning process is assessment, the means by which designers/facilitators determine whether or not the learning objectives are achieved. Factual 'tests' are often poor assessment

tools. Better are assessment methods that demonstrate competence in real life contexts. Assessment is part of the design, not an afterthought.

In summary, when developing coursework or other types of instruction, designers/facilitators can ask themselves the following questions.

- At the end of this learning event, what are the essential understandings, attitudes, and/or skills the emerging leader must have developed? What must the learner know; and what must the learner be able to do?
- What instructional method(s) will best accomplish the learning goals? In what ways will the emerging leader work with the material (and with other learners) to ensure that authentic learning takes place and, thus, increase the likelihood that learning is transferred to the context?
- How will we know that learning has taken place? What assessment processes will best indicate that the emerging leader has achieved the necessary understandings or developed the required skills?

Developing or sourcing content can be a challenge. Churches can design their own proprietary content, adopt material from another church or organization, use online resources, or purchase well-designed materials from organizations such as BILD or the Centers of Church-based Training¹⁴¹. The availability of high quality distance learning programs from institutions such as South African Theological Seminary¹⁴² gives churches the option of developing a blended approach combining accredited learning with other church-based developmental processes. Should local churches develop proprietary programs of high quality, they may be able to negotiate a 'recognition of prior learning' agreement with an accredited institution of higher learning. Such an agreement gives emerging leaders who successfully complete the church's development program a significant amount of credit toward a theological degree.

¹⁴¹ For a list of BILD's resources, see section 5.3.1. Resources available from the CCBT are found in section 5.3.2.

¹⁴² Information on South African Theological Seminary is available at www.satsonline.org.

6.9.7.6 Use Vella's Eight Step Process to Plan Learning Events

Jane Vella¹⁴³ developed an excellent eight step planning process for learning events or short courses. This process can be of great benefit to designers and facilitators. Adapted from Goertzman (2012:8-11), the steps are described below.

- (1) WHO: Who will be coming to the learning event and who will be teaching/facilitating? What experience and expectations will they bring to the learning event? What must we know about them to enhance the learning process?
- (2) WHY: What are the circumstances that make this training necessary? What are the organizational and individual needs?
- (3) SO THAT: What change must take place? As a result of this learning event, how will these emerging leaders be different? How will their new knowledge, attitudes, and skills impact their lives, ministries, and ministry contexts? This describes the transfer objectives.
- (4) WHEN: What is the realistic timeframe for this learning event? How might this influence learning? What adjustments must be made to maximize the learning opportunity? What factors might shorten the actual time available?
- (5) WHERE: What are the strengths and limitations of the learning venue? How can the venue be maximized? What adjustments must be made? What equipment must be set up?
- (6) WHAT: What content will be taught to affect the desired changes in knowledge, attitudes, and skills? How will you decide upon the “best” and right amount of content in light of the time available, limitations of the venue, learners’ capabilities and expectations, and learning needs?

¹⁴³ More information on Jane Vella's approaches to design and adult learning are found in section 2.3.9.

- (7) WHAT FOR: What will the emerging leaders do with the content to facilitate learning, to make it their own? For example, “By the end of this course, learners will have examined key scripture passages on evangelism, identified key components in the evangelism process, developed a usable approach to sharing the gospel, and practiced sharing this approach with another person”. These are ‘achievement-based objectives’.
- (8) HOW: This is the learning process. What learning tasks will be used to accomplish the learning objectives and how will they be sequenced? Designers can use the ‘4A’ approach, W.I.S.D.O.M learning process, or another method to move learners toward the learning goals. Learning tasks are created and sequenced to provide learners with the information, practice, feedback, and tools they need to accomplish the achievement-based objectives.

Though important for conceptual learning and the development of certain skills, coursework alone falls short as a leadership development tool. Nonetheless, when well-designed, facilitated effectively, and intentionally linked with other learning experiences such as challenging ministry assignments, apprenticeship, mentoring, feedback, and reflection, instructional processes form a foundational part of the leader development process.

6.9.7.7 Selecting Developmental Elements

Based upon scripture and research, the following ingredients should be considered for integration into the leadership development design.

Holistic approach: The learning design must facilitate balanced development, addressing aspects of being (spiritual formation, character, and life purpose), knowing (essential knowledge and wisdom for effective ministry), and doing (ministerial formation — the development of ministry, relational, and leadership skills).

Transformational content: The content of a church-based leader development initiative must be centered in God's word and relevantly, accurately, and effectively applied under the direction of the Holy Spirit.

Transformational context: Like Jesus, church leaders must seek to create a transformational environment characterized by spiritual encounter, relational accountability, and experiential learning.¹⁴⁴ The transformational impact of the learning environment can be increased by facilitating engagement with God in both private and public contexts, exposing emerging leaders to the working of the Spirit, creating an accountable learning community in the same way Jesus did, and involving emerging leaders in authentic ministry.

'With-ness': Emerging leaders must have opportunities to associate closely with, observe, learn from, work with, and interact with experienced leaders over time.¹⁴⁵

In-service learning: Both Jesus and Paul developed leaders 'on-the-job', in mission for mission. Research has clearly demonstrated that emerging leaders learn best through authentic, meaningful experiences.¹⁴⁶

Apprenticed/supervised ministry: Early ministry tasks and assignments that include challenge, assessment, and support are especially developmental when integrated with apprenticeship/mentoring, coursework/instruction, constructive feedback, and reflection.

Mentoring: Vital throughout the learning period, mentoring¹⁴⁷ provides emerging leaders with encouragement, perspective, accountability, and emotional and spiritual support. Mentoring also creates opportunities for personalized instruction, constructive feedback, and meaningful assessment.

¹⁴⁴ See section 5.3.3 for Webber's four dynamics of transformation in leader development.

¹⁴⁵ Section 4.3.8 examines the practice of 'with-ness' in the developmental approach of Jesus.

¹⁴⁶ Jesus employed an 'in-service' model to develop the Twelve. Research has shown that challenging 'work' assignments contribute significantly to leader development. See section 5.5.1.

¹⁴⁷ Mentoring is discussed as a developmental tool in section 4.3.6.3.

Times of reflection: Reflection is an important part of the transformation process and must be built in to the developmental program. Transformative learning¹⁴⁸ occurs as learners reflect on and embrace new perspectives after underlying assumptions and beliefs have been challenged by new ideas. Dynamic reflection¹⁴⁹ is a special process that integrates lessons learned from engagement with God, in-service ministry experience, input from courses and other sources, and dialogue, resulting in spiritual formation. Feedback exercises, retreats, guided devotionals, and journaling provide excellent opportunities for reflection.

Facilitated engagement with God: The leadership training period provides an excellent opportunity for more experienced leaders to provide guidance to emerging leaders that facilitates transformational encounters with God. Guided devotionals, biblical research on important topics, scripturally based personal growth projects, special seasons of prayer, fasting, retreats, times of focused reflection, and journaling can all help facilitate growth and development.

Serious ordered learning: Biblically based courses using Spirit-enabled facilitators and a variety of engaging, interactive, adult learning methods can play an important role in the development of emerging leaders. In this way, emerging leaders gain much of the biblical and practical knowledge needed for effective ministry in the body of Christ and the world. Moreover, when applied against the backdrop of real life and ministry, serious ordered learning promotes the development of biblical wisdom. Courses are most effective when integrated with other learning processes.

Once elements have been prayerfully considered and selected by the design team, they must be integrated into a realistic, well-conceived, implementable design.

¹⁴⁸ Transformative learning is explored in section 3.3.8.

¹⁴⁹ 'Dynamic reflection', a technical term coined by Clinton (1984:48), is discussed in section 5.2.2.

6.9.8 Create an Integrated Design

Develop a roadmap¹⁵⁰ for the journey ahead. Against the backdrop of your church context and ministry, and in light of the personnel, resources, facilities, and funds required, prayerfully determine how these various processes can be sequenced, linked, and spaced in order to facilitate growth toward the developmental goals over the designated period. Consider utilizing a three-year development cycle. Guided devotionals, courses, and in-service learning, supported by formal and informal mentoring (as well as peer co-mentoring), can run in linked, parallel streams over the entire three-year developmental period. Learning must be sequenced from the simple to the complex, from the known to the unknown, and in-service experience from closely supervised/apprenticed low risk tasks to increasingly important ministry assignments in which the emerging leader is free to act with a measure of autonomy. Remember to promote development by providing an appropriate level of challenge, support (both personal and organizational), and helpful assessment with each learning experience. Learners should be supported throughout the learning period by mentors who provide constructive feedback and facilitate dynamic reflection. Deliberate linking among the various learning streams serves to reinforce learning and promote balanced development. Throughout this period, emerging leaders must have exposure and access to senior leaders who can serve as 'in mission' role models and spiritual fathers or big brothers.

Once the integrated design is complete, undertake advanced planning to ensure that personnel, facilities, funding, and other resources are allocated to support the scheduled processes. Who will be doing what when and where with which resources and which emerging leaders? The church's design team must be realistic in their approach. Operating a leadership development initiative of this magnitude requires effective and efficient management and administration.

¹⁵⁰ Webber compares the design of leader development to the creation of a roadmap for a journey. See section 5.3.3.7.

As a part of the overall design, endeavor to create one or more developmental pathways.¹⁵¹ Developmental pathways are preplanned paths to positions of increased leadership responsibility in an organization. Leaders continue to develop over a lifetime; and, wherever possible, opportunities for increased levels of responsibility should be provided. Movement into increased levels of responsibility can be matched by higher level training and development.

Obviously, a leader's calling and gifts will profoundly affect his or her life direction; but churches need to be wise in channeling emerging leaders into responsibilities that align with their maturity, calling, passion, and gifts. Failure to do so can frustrate the development of the emerging leaders and result in them leaving the church to seek service opportunities elsewhere.

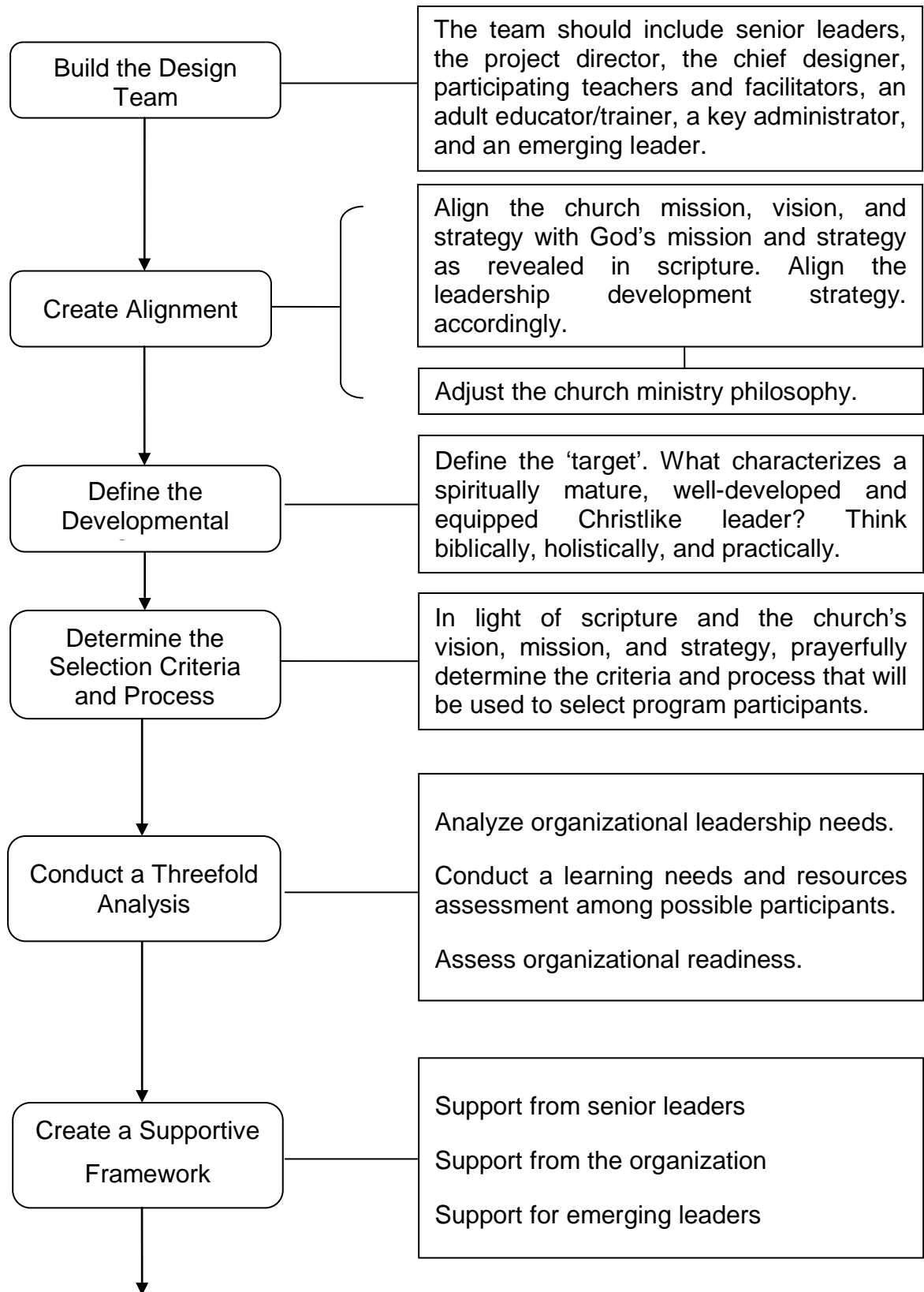
Developmental pathways do not just benefit emerging leaders. Churches with developmental pathways are virtually assured of an abundant stream of developing leaders who are committed to the church mission and vision, familiar with the church's strategy, and accustomed to the organizational culture. Moreover, the use of developmental pathways gives senior leaders the opportunity to observe and work with emerging leaders over an extended period, making it much easier to assess the commitment, character, calling, and giftedness of emerging leaders when considering additional full-time staff.

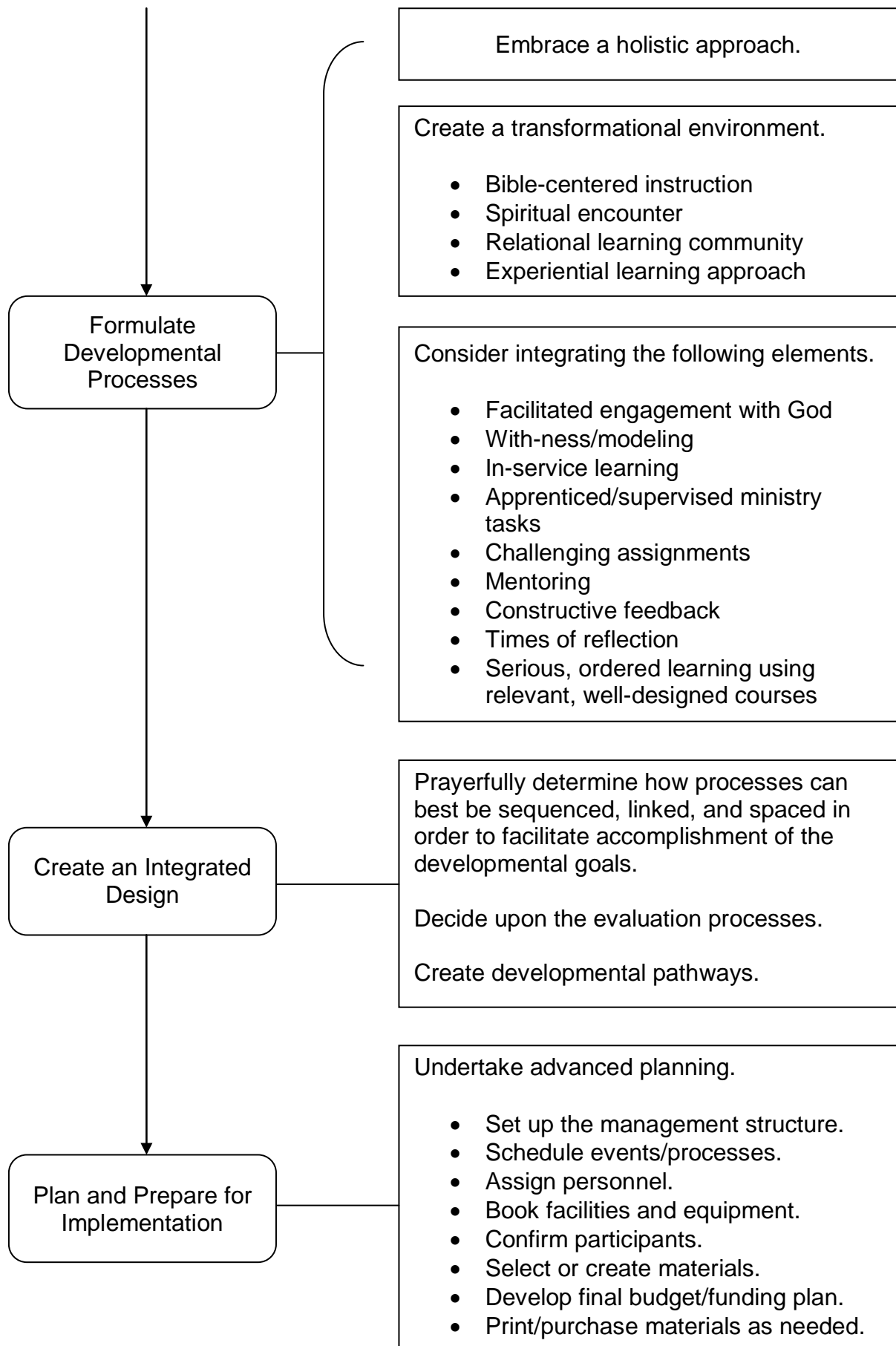
6.9.9 *Template Flow Chart*

The following flow chart (Figure 6.9) provides church leaders with a simplified overview of the suggested design process. The boxes on the left are the primary steps. The boxes on the right contain a brief summary of the actions associated with the step. Church leaders would be free to utilize the suggested design process or modify it as they see fit. As previously noted, there is no single 'right' way to design a leadership development process. There is, however, one imperative. To be of maximum effect, this process must be saturated in prayer and directed by the Holy Spirit.

¹⁵¹ Developmental pathways are discussed in section 6.6.3

Figure 6.8: Design Template Flow Chart





6.10 Conclusion

The rising popularity of ministry models such as the cell church and the frustrations and challenges associated with Bible college or seminary training have motivated a number of churches in South Africa to experiment with church-based approaches to the development of leaders. While some churches have created their own proprietary approaches to leadership development, others have chosen to make use of existing courses and/or curricula provided by tertiary institutions, mega-churches, or online ministries. In line with modern educational paradigms, churches often rely primarily upon classroom-based, content-heavy, teacher-centered training programs, few of which result in balanced, transformational leadership development.

In an effort to assist South African churches to formulate effective leadership development initiatives, this project has sought to identify design elements fundamental to the creation and implementation of transformational church-based leadership development strategies and to compile a set of recommended practices to guide South African churches in the design of effective leadership development programs and processes. Drawing from scripture, adult learning theory, instructional design theory, contemporary models, and research on the development of leaders, this chapter proposes a set of recommended practices and a step-by-step template to assist churches to design holistic, transformational processes that facilitate spiritual and ministerial formation and enhance the leader development process.

Both the recommended practices and design template featured in this chapter take cognizance of several factors. To produce balanced leaders, leadership development initiatives must be holistic in their approach, facilitating development in the learning domains of being (spiritual formation, character, and life purpose), knowing (essential knowledge and biblical wisdom), and doing (ministry giftedness and skills). To create a transformational environment, designers must seek to facilitate four critical dynamics: instruction centered in God's word, authentic spiritual encounter with God, relational accountability, and learning from experience. As research has shown, certain processes significantly enhance the development of leaders. With a clear developmental goal in mind, designers

should consider the inclusion of facilitated engagement with God, apprenticed/supervised in-service learning, challenging ministry tasks and assignments, close association and interaction with more experienced leaders, developmental mentoring/discipleship relationships that include assessment and constructive feedback, instructional processes suited for adult learners, and opportunities for dynamic reflection, all within a prayerfully integrated learning process over an extended period of time. When ministry assignments and other learning experiences include the three elements of challenge, assessment, and support, they become especially developmental.

For church-based leadership development initiatives to succeed, several support factors must be in place. From the beginning, the whole leadership development process must be designed and implemented in absolute dependence upon the Holy Spirit. In addition, church-based leadership development efforts must enjoy the enthusiastic support of the church's top leaders. The support of senior leaders is likely to guarantee two other critical success factors — integration into the church's vision and strategy and practical support from the organization itself. Both organizational infrastructure and organizational culture must be geared to support the program, processes, and participants. For the initiative to succeed, the organization must provide the resources, facilities, personnel, and funding required for successful implementation. In South Africa, at least one other factor is of critical importance. Churches operating leadership development initiatives in a multicultural context must take into consideration historical and cultural perspectives in the design and implementation of their developmental processes.

The development of leaders is a biblical mandate, taught and modeled by both the Lord Jesus Christ and the apostle Paul. If local churches are to fulfill their God-given purpose, then they must accept and embrace their developmental responsibility. Jesus said, "I will build my Church" (Matthew 16:18). Leader development is one way he does this. For church leaders seeking to work together with the Lord in this process, the biblically inspired, research-backed practices and design template featured in this chapter provide practical guidance.

Chapter Seven

Toward Transformational Leadership Development in the Local South African Church

7.1 Review of the Research Problem and Objectives

With the increased use of leader-intensive ministry models such as the cell church and the complexities, contextual issues, and costs associated with tertiary training, church-based leadership training continues to gain momentum as a grass roots movement among South African churches. Habituated to the Western academic model, many churches rely primarily upon classroom-situated courses to develop their leaders. Though courses certainly have value, a merely academic approach to leadership development lacks the balance and transformational impact needed to build effective Christian leaders. To design effective developmental models, churches need an understanding of the various elements that contribute to spiritual and ministerial formation and how these elements can be integrated into an effective leadership development process.

To help address this challenge, this project sought to identify the various factors that facilitate the transformational development of ministry leaders and how these can be effectively incorporated into a church's leadership development design. As such, this project set out with two primary objectives:

- (1) To identify elements fundamental to the design of transformational church-based leadership development strategies.
- (2) To compile a set of recommended practices to assist South African churches in the design and implementation of transformational leadership development programs and processes.

In an effort to achieve the primary objectives, the following research questions were considered.

- What role should 'design' play in a transformational leadership development strategy; and how should instructional design theory inform the design of church-based leadership development strategies?
- How should adult learning theory inform the design of church-based leadership development strategies?
- How can the leadership development strategies practiced by Jesus and Paul inform the design of leadership training processes in the local church?
- What principles and practices can be gleaned from existing international and local models of church-based leadership training?
- How can research on best practices in organizational leadership development inform the design of leadership training processes in the local church?
- What role do cultural considerations play in the design of an effective leadership development strategy in the South African church?

As stated in the introductory chapter, it was never the intent of this project to develop a model, but rather a set of 'recommended practices' (supplemented by a design template) to assist South African churches to develop their own context-specific strategies for transformational church-based leadership training, with a view toward the fulfillment of God's missional purposes in and through the church. Though practical theology projects often result in the development of a 'model', this researcher believes that local churches need to develop their own models based on their own unique needs and context. It is envisioned that the findings of this research project will assist churches in this important process.

7.2 A Review of the Research Process and Findings

This research project sought to identify design elements fundamental to the creation and implementation of transformational church-based leadership development strategies and, subsequently, to compile a set of recommended practices to guide South African churches in the design of effective leadership development programs and processes.

The questions in the previous section shaped the research process utilized in this project. Chapters two, three, and four respectively examined and synthesized perspectives of scholars and practitioners on instructional design, adult learning theory, and leadership development strategies in the New Testament. Chapter five reviewed Clinton's developmental model, the U.S. Army's model, the international church-based training models of BILD International, the Centers of Church-based Training, and LeaderSource SGA, as well as local proprietary models developed by Little Falls Christian Centre and Maranatha Community Church. In addition, certain models from organizational research were briefly considered. The sixth chapter combined research on best practices in organizational leadership development with gleanings from previous chapters to create a 'theory of action' in the form of a set of 'recommended practices' for the design of transformational leadership development initiatives in the South African church. This was then extended to the formulation of a template to provide practical step-by-step guidance to local churches seeking to design their own multifaceted development programs for emerging leaders.

7.2.1 Insights from Instructional Design Theory

Theories and models of instructional design were reviewed in chapter two. Piskurich (2006:1) described instructional design as a process that helps individuals and organizations to "create effective training in an efficient manner" by asking the right questions, making informed decisions, and developing a useful product suited to a particular situation. Over the past half century, the field of instructional design has undergone a major shift away from its original top-down, linear, behaviorist approach toward more iterative, nonlinear, learner-

centered approaches reflective of recent shifts in educational philosophy. While most contemporary instructional design models emphasize the importance of learner-centeredness, flexibility in design, and learning through experience, there is an obvious tension between traditional systems-based models and the newer constructivist models. Systems-based models stress the importance of front-end analysis, clear learning objectives, appropriate instructional strategies, and meaningful evaluation. Models based on a constructivist perspective seek to facilitate the development of personal meaning and give much more design control to learners. Though they spring from different philosophies, both have value in the design of leadership development processes.

This project examined eight ‘user friendly’ instructional design models.

- Gagné’s conditions of learning and events of instruction
- The Dick and Carey systems approach model
- The Smith and Ragan instructional design model
- The Morrison, Ross, and Kemp model (the MRK model)
- ADDIE (the instructional systems design model)
- The backward design model of Wiggins and McTighe
- Willis’ R2D2 constructivist model
- Vella’s eight design steps for dialogue education

There is no ‘best’ model for designing instruction. Each of these models has definite strengths, particularly in the contexts for which they were designed.

When informed by an assessment of organizational problems and/or learners’ needs, instructional design models assist designers to define clear learning objectives, develop and implement appropriate instructional strategies, and evaluate the effectiveness of learning. Though instructional design models feature differences based on underlying theoretical perspectives and their context of application, they all share a common and ultimate purpose — effective, efficient, enduring learning.

Research on the various approaches to instructional design provided helpful insights that can be applied to the design process for church-based leadership development initiatives. Webber (2008a, 2009) stated that designing leader

development is similar to planning a journey.¹⁵² One starts with the intended destination in mind, considers the route to get there, and then designs a map for the journey. As Piskurich (2006:1) noted, instructional design helps those entrusted with the design responsibility to ask the right questions. Synthesizing suggestions from Webber (2009), Mager (1984), Wiggins and McTighe (2008:5), Morrison et al. (2001), and Vella (2008:32) yields five sets of questions that provide a practical design framework for those seeking to create church-based leadership development initiatives.

- (1) Where are we going? What is the intended 'destination'? What are the developmental goals? What characterizes a properly developed Christian leader? At the end of the process, what must emerging leaders know, be able to do, and be like?
- (2) Who is going? Who are the participants in this journey and what are they like?
- (3) Why is this training necessary? What situation or need calls for this process?
- (4) How will we get there? What instructional strategies, content, and learning processes facilitated by which personnel with what resources will best accomplish the developmental goals?
- (5) How will we know when we have arrived? How can the achievement of learning be best assessed?

From the perspective of Morris et al. (2001:5), learners, objectives, methods, and evaluation form the framework of systematic instructional design. Believing it essential to understand and build upon the reason the training/development is necessary, Vella (2008:31-32) added the 'Why?' to this process. From her perspective, the 'Who?' and the 'Why?' are essential to the accurately assess the 'What?' and the 'How?'

For church leaders seeking to develop effective leadership training processes, applying instructional design principles and practices — or even just asking and

¹⁵² See section 5.3.3.7 for greater detail on Webber's design approach.

answering the right questions — could do much to make church-based leadership development processes far more effective, meaningful, and transformational.

7.2.2 Gleaning from Theories of Adult Learning

Adult learning theory is closely related to the field of instructional design. Whereas instructional design theory focuses on the most effective instructional strategy to reach a learning objective, adult learning theory is concerned with how adults learn. Undergirding adult learning theory is the presupposition that adults learn differently from children.

Chapter three reviewed scholarly perspectives on six orientations to learning: behaviorist, cognitivist, social learning, humanist, constructivist, and holistic. After an overview, specific learning theories were examined. Of particular interest for church-based leadership development were andragogy, cognitive learning approaches, social learning, experiential learning, and transformative learning. Constructive and holistic perspectives were also considered. Though no single theory can account for the complexities of learning, each theoretical approach has value for church-based leadership training.

The theory and model of andragogy¹⁵³ (Knowles 1980) focuses on the unique characteristics of adult learners and their implications for learning. Andragogy posits that, because adults have a sense of personal responsibility and make their own decisions, they normally prefer to be viewed as capable of self-direction. In other words, they do not enjoy being treated like school children. In addition, adult learners possess a certain level of unique life experience, from which much of their identity is derived. This level of experience makes adult learners a resource for others; and adults are appreciative when their experience and perspectives are valued by facilitators and other learners. Failure to acknowledge and value the accumulated experience of adult learners will

¹⁵³ Andragogy is discussed in section 3.3.4.

discourage learning and may even motivate participants to withdraw (Brookfield 1991:12-13).

Andragogy also notes that adults are life-centered (or problem-centered) in their orientation to learning (Knowles et al. 1998:67). They prefer to know why they need to learn something. Motivation and readiness to learn are highest when adults believe that new information or skills will help them perform tasks or deal with real-life situations more effectively. For this reason, adult learning experiences are most effective when they correspond with periods of new or increased responsibility, such as a challenging ministry assignment. As Brookfield (1991:9-12) mentioned, since adults are often highly motivated to learn and expect training to help them function more effectively, designers and facilitators need to invest an appropriate level of effort and ingenuity in the design and implementation of learning experiences.

The most potent motivators for adult learners are internal. Though adults do respond to some external motivators, intrinsic factors serve as stronger motivations for adult learning. This has implications in a church-based learning scenario. Emerging leaders are far more likely to be motivated by the desire to become more competent in ministry than by the desire, for instance, to make good grades on course exams. Understanding and applying these principles to the design of church-based leadership development initiatives could do much to enhance the effectiveness of the learning process.

Other learning theories provided additional insights of value to church leaders considering church-based training initiatives. Cognitivist¹⁵⁴ approaches stress the importance of understanding the workings of human memory. Too much new information or information presented in a disorganized manner can create frustration and thwart learning. New information is best absorbed when meaningfully linked to prior learning. Learning tasks should move from the known to the unknown and from the simple to the complex. Linking, sequencing, and reinforcement play important roles in the learning process.

¹⁵⁴ Cognitivist approaches to learning are examined in section 3.3.2.

Experiential learning¹⁵⁵ is fundamental to adult learning. Educators understand that ‘doing’ plays a major role in the learning of concepts, skills, and attitudes; and Jesus himself clearly demonstrated the value of this approach to learning in his development of the Twelve. Vella (2002:14) places great importance on praxis (action with reflection) in the learning process. Authentic learning is far more likely when participants do something meaningful with new knowledge, practice new skills and attitudes in an authentic context, receive feedback, and reflect on what they have done. This is especially effective when applied in a context-based, problem solving capacity.

The principles of social learning (social cognitive) theory¹⁵⁶ come to bear on the design of leadership development initiatives. The learning of behaviors through observational learning (modeling) and social reinforcement were as evident in the life of Jesus and the early church as they are today. For this reason, emerging leaders must be given ample opportunity to interact and associate with more experienced leaders. Leadership is as much ‘caught’ as it is taught.

Constructivism¹⁵⁷ asserts that human beings construct their own meaning and cannot know reality in an objective sense. Though controversial because of its epistemological assumptions, this theory has significantly influenced educational trends in recent years. A learner-centered approach, constructivism sees learning as an active process of discovery, often in a social context, in which learners are free to arrive at divergent understandings of reality. Though the epistemological perspective may be troublesome for church leaders, the constructivist approach does highlight the importance of active learning and the personal construction of meaning, both of which have become increasingly important in the field of adult learning. Guided processes such as dialogue education sideline the epistemological controversy and combine constructivist learning processes with andragogical principles, group dynamics, and cognitive

¹⁵⁵ Examined in section 3.3.5, experiential learning plays an important role in the development of leaders.

¹⁵⁶ Social learning theory is explored in section 3.3.3.

¹⁵⁷ Constructivism is discussed in sections 2.3.7, 2.3.8, and 3.3.6.

and experiential learning processes to facilitate adult learning with a strong emphasis on transfer of learning to context.

Also focused on the making of meaning, transformative learning¹⁵⁸ occurs when a person is exposed to new or different ideas through dialogue, spiritual encounters, or other processes and, through reflection, critically assesses his/her own previously assimilated assumptions, beliefs, values, and perspectives so that they become more open, permeable, and better justified. Transformative learning often occurred in the New Testament as people were exposed to the teaching of Jesus and the transformational work of the Holy Spirit. A vital ingredient in a leadership development process, this type of learning is commonly associated with 'paradigm shifts' and alterations in worldview.

Holistic learning theory¹⁵⁹ (Yang 2003, 2006) sees knowledge as a social construct and recognizes the importance of the interconnectedness among conceptual, perceptual, and affective facets of knowledge at both individual and social levels. For the individual, these three knowledge facets are expressed in three interconnected 'layers': foundation (the type of knowledge), manifestation (how the knowledge is expressed), and orientation (the driving process). Instead of focusing on a specific element or process in learning, this theory seeks to integrate aspects from many theories in an attempt to better explain knowledge interaction and, thus, enhance adult learning. Though this theory awaits empirical validation, its 'whole life', interconnected perspective on learning seems to align with the holistic ('being, knowing, doing') developmental perspective advocated by Clinton (1984:14) and evident in scripture.

Whereas theorists attempt to explain how adults learn, practitioners focus on what works. A synthesis of perspectives offered by well-known practitioners Dorothy Billington¹⁶⁰ (1996) and Jane Vella¹⁶¹ (2002, 2008) produced the

¹⁵⁸ Vital to leader development, transformative learning is discussed at length in section 3.3.8.

¹⁵⁹ Yang's theory of holistic learning is examined in section 3.3.3.9.

¹⁶⁰ Billington's recommended practices for adult learning are detailed in section 3.4.2. Jane Vella's twelve principles of effective learning are reviewed in section 2.3.9.1.

¹⁶¹ Vella's twelve principles of effective adult learning are found in section 2.3.9.

following recommendations for church-based leadership development initiatives. Adult learners tend to value an emotionally safe and supportive environment where individual needs are recognized and abilities and life experience are acknowledged and respected. While acknowledging that they are learners, emerging leaders appreciate being treated with respect by teachers and facilitators. An environment characterized by creativity, variety, experimentation, and intellectual openness is highly valued. In addition, adult learners appreciate learning experiences that are engaging, well-sequenced, interactive, participative, and relevant to life. Learning experiences should involve the cognitive (knowing), physical (doing), and affective (being) realms. New learning should be meaningfully linked to previous learning wherever possible; and learning experiences should be paced to challenge learners slightly beyond their current level of learning. Active involvement in discussion, dialogue, problem-solving, context-based challenges, and other forms of experiential learning increases effectiveness. Learners must be able to work with new information or skills in a meaningful way as part of the learning process. Learning experiences are especially valuable when accompanied by constructive feedback and opportunities for reflection. Adult learning experiences should focus on building essential understanding and competence, with the ultimate aim of seeing learning transferred into a real-life context.

7.2.3 Leadership Development in the New Testament

Chapter four examines leadership development in the New Testament. God himself develops Christian leaders over a lifetime. As Clinton's (1988:25) leadership emergence theory states, the development of these leaders is a function of God's processing and the emerging leader's response over time. Though God himself raises up leaders, he calls church leaders to participate with him in this process. As Webber (2008a:69) noted, "Leaders build leaders". Concurring with this perspective, Clinton (2001:132) identified the selection and nurturing of emerging leaders as a key function of Christian leadership.

The intentional development of leaders is clearly mandated in the New Testament.¹⁶² During his earthly ministry, Jesus invested the better part of three years developing twelve handpicked disciples to lead the church after his ascension. On the very day of his resurrection, Jesus commissioned these men to continue the process he had started (John 20:21). Jesus had been sent by the Father to accomplish his purposes; and, now that he was departing, Jesus sent his disciples to continue the mission. Not only were the disciples commissioned to proclaim the gospel around the world (Mark 16:15), they were also instructed to implement the same type of developmental, disciple-making strategy that Jesus had modeled (Matthew 28:18-20). The strategy outlined by Jesus envisioned the disciples/apostles applying in ever-expanding cultural and national circles the very same developmental processes that he had employed with them over the previous three years. They were to ‘reproduce’, to disciple others to the point of becoming disciple-makers themselves.

As is evident in his life and teaching, the apostle Paul was committed to this developmental mandate. Writing to the Colossian church, Paul explained that the ultimate purpose of his hard work in the Spirit’s power was to present every person ‘complete’ or fully developed in Christ (Colossians 1:28). To the Ephesians he clarified that gifted leaders are given to the church to equip God’s people for ministry in order to build up and mature the body of Christ (Ephesians 4:11-13). The apostle modeled this role by investing in a number of emerging leaders over his apostolic career, including his best-known protégé Timothy. Paul was so concerned that this developmental strategy continue that he instructed Timothy, “The things which you have heard from me in the presence of many witnesses, entrust these to faithful men who will be able to teach others also” (2 Timothy 2:2).

Churches committed to developing their own leaders can learn much from the training approach used in the New Testament.¹⁶³ Jesus and Paul both focused on the development of a small, handpicked group of emerging leaders over an

¹⁶² The biblical mandates for leader development are discussed in section 4.2.

¹⁶³ The developmental approaches used by Jesus and Paul are reviewed in section 4.3.

extended period. The close association afforded by Jesus and Paul to trainee leaders provided them with an opportunity to learn from their example, build genuine relationship, and engage in intimate dialogue. Both Jesus and Paul served as role models, teachers, mentors, and coaches to their disciples. Far more than followers and pupils, their disciples were actually apprentices learning to be and do like their teachers. As was characteristic, these apprentices were trained in mission for mission through a balanced strategy including modeling, instruction, mentoring, and in-service, on-the-job learning. As the disciples matured, they were gradually entrusted with increasingly important and challenging ministry responsibilities, not all of which were successfully executed. As part of the developmental process, both Jesus and Paul provided trainee leaders with constructive feedback, no doubt resulting in times of reflection and enhanced learning. Teaching was also an important part of the developmental process. A careful examination of Jesus' teaching style reveals that he used a variety of engaging, provocative, interactive, paradigm-challenging teaching methods. Stein (1994:8) commented that three things made Jesus a great teacher: who he was, what he taught, and how he taught it. Jesus was careful to communicate what his Father commanded and to depend upon the Holy Spirit. Yet, he also understood humankind and used a variety of effective communication methods, including storytelling, lecture, discussion, questions, dialogue, object lessons, visualization, and clever use of language. How can today's church leaders do less?

The New Testament also gives insight on selection for training.¹⁶⁴ It is important to note that both Jesus and Paul handpicked those they trained. Jesus selected the Twelve from among those who had already demonstrated commitment and faithfulness; but the determining factor in his choice was the leading of the Holy Spirit. Jesus spent the entire night in prayer before making his selection. The apostle Paul also gives us insight. Paul selected Timothy on the basis of his reputation among the churches and possibly because of prophetic utterance. It is intriguing to note that selection was never based upon education, social standing, or talent.

¹⁶⁴ Selection in the New Testament is discussed in section 4.7.

In addition to learning from Jesus and Paul, church leaders must recognize the critical role the Holy Spirit plays in leader development.¹⁶⁵ The book of Acts indicates that the Holy Spirit directs the affairs of the Church and raises up leaders (Acts 13:1-4; Acts 20:28). Existing church leaders must remain sensitive to the leading of the Spirit to ensure that they cooperate with his plans in the lives of emerging leaders. Not only does the Spirit direct and select leaders, he facilitates their transformation, helping them become more like Christ (2 Corinthians 3:18). The Spirit not only develops character, he also bestows spiritual gifts. It is an emerging leader's giftedness that gives direction to the development of his/her ministry.

'Transformation'¹⁶⁶ is intrinsic to Christian leader development. The New Testament gives insight into how this process occurs. Transformation, or the process of being conformed to the image of Christ, is driven by the Holy Spirit. However, God also uses his word, other people, and life experiences to facilitate this process. Church leaders can enhance the transformational impact of their leadership development initiatives by centering teaching in God's word and creating a learning environment characterized by authentic spirituality, relational accountability, and experiential learning (Webber 2008a:8-12).

7.2.4 Gleaning from Existing Models

In an effort to identify effective practices in church-based leadership development, chapter five reviewed a number of models and strategies used in leadership development. After highlighting the weaknesses of the traditional schooling model, consideration was given to Clinton's (1994, 2006) holistic developmental model, the Be-Know-Do model of the U.S. Army, the church based training models of BILD International (Antioch School) and the Centers of Church-based Training, the church-integrated design model offered by LeaderSource Strategic Global Alliance, the proprietary models of Little Falls Christian Centre and Maranatha Community Church in South Africa, and the 70-

¹⁶⁵ The role of the Holy Spirit in the development of leaders is examined in section 4.5.

¹⁶⁶ Perspectives on biblical transformation are considered in section 4.6.

20-10 model suggested by the Center for Creative Leadership (Wilson et al. 2011:4). Additional insights from organizational research were also considered.

Since ministry flows out of 'being', Clinton¹⁶⁷ (1994, 2006) highlighted the importance of creating holistic leadership development processes that result not only in the acquisition of knowledge and skills, but, more importantly, the development of Christlikeness. This 'being, knowing, doing' balance is fundamental to effective leader development.

The founder of BILD International, Jeff Reed¹⁶⁸ (BILD 2012) views the church as the optimum context for the development of Christian leaders. Committed to an international church-planting strategy rooted in "the way of Christ and his apostles", BILD assists church networks to develop their own leaders using biblically centered courses taught by gifted church leaders in the context of biblical community and mission. Recognizing the value of serious ordered learning and the cultural leverage afforded by accreditation, BILD founded the Antioch School of Church Planting and Leadership Development to work in partnership with American churches, equipping them to fulfill the biblical mandates for church-based leadership development and church planting.

Also committed to equipping local churches, the Centers for Church-based Training (2010, 2011) developed a well-conceived, biblically sound church-based leadership training course driven by Miller's (2012) problem-based W.I.S.D.O.M learning process.¹⁶⁹ Combined with community-based experiential learning and mentoring, CCBT's *Leadership Series* offers churches an effective and balanced process of leadership development.

Adopting a different approach, LeaderSource Strategic Global Alliance¹⁷⁰ seeks to equip churches with the perspectives and tools needed to design their own multifaceted, contextually appropriate, church-based processes for developing

¹⁶⁷ Clinton's model is highlighted in section 5.2.2.

¹⁶⁸ The BILD model and the Antioch School are examined in sections 5.2.4 and 5.3.1.

¹⁶⁹ See section 5.3.2 for an overview of the CCBT model and the W.I.S.D.O.M. learning process.

¹⁷⁰ Webber's LeaderSource model is reviewed in section 5.3.3.

Christ-centered, spiritually mature, well-equipped leaders. LeaderSource founder, Malcolm Webber (2008a, 2008b, 2009), emphasizes the importance of defining a Christlike leader and then designing a holistic collage of experiences built around a transformational context to facilitate the development of such a leader.

All three of these models view the local church as the biblically-mandated community for the development of Christian leaders; and each can inform the design of church-based leadership development initiatives. Each model emphasizes the importance of defining the type of leader to be developed, with spiritual and ministerial formation the principle goals and mission the result. Unlike the traditional schooling paradigm, these models stress the importance of an integrated, balanced, developmental approach featuring the use of courses built around adult learning methodologies, in-service learning, learning in community, mentoring, feedback, and reflection.

The South African churches¹⁷¹ reviewed in this project also provide helpful insights. Though both churches rely heavily on lecture-based input, Little Falls has developed a well-supported, sequenced learning process and Maranatha an integrated process of courses, in-service learning, and mentoring. Significantly, both have created leader development models with a clear developmental pathway. Though both churches confess the need for improvement in their leadership development processes, an abundance of emerging leaders and their homegrown pastoral teams attest to the success of their programs.

Research by the Center for Creative Leadership lends credence to the important role that experience plays in leadership development. Thirty years of research have shown that leadership is best learned through developmental processes that employ a 70-20-10 model¹⁷² (Wilson et al. 2011:4). On the average, leaders ascribe seventy percent of their learning about leadership to experience, twenty percent to developmental relationships, and ten percent to coursework and

¹⁷¹ See section 5.4 for an overview of these proprietary church-based leadership development models.

¹⁷² The 70-20-10 model is discussed in section 5.5.1.

training. Nonetheless, coursework is more significant than it may seem. Emerging leaders learn important foundational concepts through courses. When integrated with other learning processes such as challenging job assignments and mentoring, course-based learning has a multiplied learning effect.

As Conger and Riggio (2007:105) recognized, leader development is not an end in itself. Leaders are developed to enable the organization to fulfill its purpose. As such, organizations must align both their perspectives on leadership needs and their approach to leader development with the organization's vision, values, and strategy. The future of an organization is tied to the successful development of emerging leaders. In the same way, local churches must align themselves with God's purposes for the church and work together with the Holy Spirit to develop leaders who can fulfill these purposes.

7.2.5 Research on Leadership Development Practices

Research on the development of leaders in organizations has identified a number of perspectives and practices that are critical to the success of leadership development initiatives. Though practices vary from organization to organization, there are three undergirding factors that provide the framework for the development of effective leader development programs: strong leadership and support from senior leaders, a focus on emerging leaders with high potential, and leadership development that is 'done right' (Effron et al. 2005). Organizations cannot depend upon sporadic leadership courses to develop the next generation of leaders. Evidence is ample that effective leadership development requires a multifaceted, experiential, comprehensive learning approach applied over an extended period of time.

Though well-designed courses challenge paradigms, create conceptual awareness, and lay foundations, emerging leaders learn the most through challenging job assignments (Wilson et al. 2011:4). Research further indicates that on-the-job learning experiences are most beneficial when accompanied by immediate and specific feedback from mentors and coaches (Conger and Benjamin 1999:53, Wilson et al. 2011).

7.3 A Theory of Action (Recommended Practices)

Chapter six synthesizes input from organizational research with findings from previous chapters to develop a theory of action expressed in terms of a set of recommended practices and a step-by-step template to assist churches in the design of transformational leadership development processes.

To be effective, leadership development in the local church must embrace the old and the new. Churches must understand and embrace the mandates, goals, and leadership development processes highlighted in scripture while integrating into their design the best of what research has taught us about how adults learn and how leaders develop.

As Forman et al. (2004:25) noted, “The local church is by design the most effective incubator of spiritual leaders on the planet”. Using a whole-life approach that features wisdom-based learning and developmental relationships within a learning community, churches can produce servant leaders who know God and his word, demonstrate Christlikeness in their character, and are skilled in ministry and mission (Forman et al. 2004:25, 62). Church leaders must understand that leaders are matured through a transformational process involving the work of the Holy Spirit, instruction in God’s word, meaningful relationships, and challenging experiences (Webber 2008a:234). A holistic approach assures balanced development in the three learning domains of being, knowing, and doing (Clinton 1989), resulting in spiritual and ministerial formation.

Webber (2008a, 2009) described the Christian leadership development process as a journey. It begins with the end in mind, identifies the processes and contexts required to reach that end, and develops a design to guide the process. A well-conceived, Spirit-enabled design, saturated in prayer and employing effective learning processes, will build a well-developed leader, provided that the individual in question cooperates with the process.

Ultimately, what key factors contribute to the design of an effective church-based leadership development strategy? Research on leadership training best practices, leadership development in the New Testament, adult learning,

instructional design, and contemporary models led to the formulation of ten recommended practices.

- (1) Approach design with a biblical perspective on leadership development.
- (2) Create alignment between the vision and strategy of the local church and the mission and strategy of the Church as revealed in scripture. It is out of this alignment that the leadership development initiative must spring.
- (3) Define the developmental goal(s). The goal is a successfully developed, spiritually healthy leader. What characterizes such a leader? What knowledge, character traits, and skills (levels of competence) must this person possess to function successfully in the church community and to fulfill God's ultimate purposes in his or her life?
- (4) Conduct a needs analysis. Understand the leadership needs of the church and the learning needs, expectations, and level of experience of emerging leaders.
- (5) Adopt a holistic, transformational approach to leadership development. A whole-life approach develops servant leaders who know God and his word (head), demonstrate Christlike character and compassion (heart), and are effective in ministry and mission (hands). A transformational process will involve supernatural encounter with God and the work of the Holy Spirit, instruction in God's word, challenging experiences such as apprenticed or supervised ministry assignments, and developmental relationships such as mentoring, coaching, and team or community-based learning.
- (6) Identify, utilize, and integrate effective developmental processes. Facilitate meaningful and purposeful engagement with God through directed devotionals, times of spiritual encounter, and ministry. Provide opportunities for emerging leaders to associate, work, and interact with more experienced leaders. Use a combination of challenging on-the-job learning assignments, developmental relationships, and well-designed coursework, carefully integrated to maximize learning. Make sure each learning experience includes the three developmental factors of challenge, assessment, and support. Include the use of feedback and dynamic reflection to enhance growth.
- (7) Incorporate serious ordered learning to ensure that emerging leaders become theologically grounded. Abide by accepted principles of adult

learning. Focus on essentials and teach/facilitate for understanding. Consider using proven instructional strategies. Employ an engaging, interactive, participative, well-sequenced approach and endeavor to provide learners with the opportunity to work with new content in a meaningful and practical way. Focus on authentic learning and transfer to context.

- (8) Conduct regular meaningful evaluation to improve the leader development process.
- (9) Create a developmental pathway for the emergence of leaders.
- (10) Practice wise selection. Be sensitive to the leading of the Holy Spirit.

Coupled together with strong support from church leaders, adherence to these recommended practices will do much to enhance the effectiveness of any church's leadership development initiatives.

Based upon these recommended practices, a step-by-step design template was created to guide church leaders through the design process. The template can be found in section 6.9.

7.5 Suggestions for Further Research

This project sought to identify elements fundamental to the design of transformational church-based leadership training strategies and to create a set of recommended practices to guide South African churches in the design of effective leadership development initiatives. The recommended practices suggested in this project were derived from current research on best practices in organizations, adult learning theory, instructional design theory, New Testament passages on leadership development, and existing church-based training models.

Application of these recommended practices in local churches represents the best opportunity for further research on the efficacy of these recommendations. To facilitate this, the findings of this project would need to be reduced to a practical document to help church leaders understand the basic principles behind the recommended practices and to provide guidance with implementation. The

design template should also be of assistance to churches seeking to create or improve processes of leader development. Churches choosing to implement these practices could then be subjected to longitudinal case studies to assess the validity of these practices for the South African church. Evaluation over time would no doubt enable researchers and designers to refine or expand the recommended practices and enhance the design template.

In addition to studying churches that choose to implement these practices, it would be helpful to assess the transformational impact on emerging leaders who participate in their leadership development programs and processes, once again with a view toward enhancing the effectiveness of leadership development in the broader South African church. Research could focus on spiritual formation, ministerial formation, and resulting ministry effectiveness.

The field would also be enriched by case studies of South African churches that have designed and implemented their own unique leader development processes. Due to the relatively recent emergence of the church-based training movement, little research has been done on the long-term effectiveness of church-based leadership training programs and processes.

Of particular interest to this researcher would be studies on churches and church networks around the world that have partnered with the Antioch School in the U.S.A., BILD International, the Centers for Church-based Training, or LeaderSource SGA. Churches in Africa might also benefit from research on the viability of better defined and more intentional church-based training partnerships between distance learning institutions such as a South African Theological Seminary and churches or church networks committed to developing their own leaders. Indeed, further investigation of how seminaries throughout Africa can better serve the local churches would undoubtedly be welcomed.

7.6 Final Challenge

The church in Africa faces a leadership crisis — not only in quantity, but also in quality. Traditional approaches to leadership training such as Bible college and seminary are simply not addressing the need.

With the rise in popularity of the cell church model, a possible, partial, long-term solution to Africa's leadership crisis has emerged. By their very nature, churches that utilize small groups need a large number of trained leaders. This need for leaders, along with impracticalities associated with theological studies at an established tertiary institution, has motivated many churches to explore alternatives to traditional leadership training methods. Among these is church-based leadership training.

A relatively new movement with a very old beginning, church-based leadership training restores the local church to the center of leader development in the body of Christ. According to church-based training pioneers like Jeff Reed (2001), Rowland Forman (2004), Bruce Miller (2004), and Malcolm Webber (2009), this has been God's design from the beginning. Organizations such as BILD International, the Centers of Church-Based Training, and LeaderSource SGA have led the way in church-based leadership development, serving as advocates, contributing to scholarship, developing materials, teaching seminars, and assisting local churches and church networks all over the world to design and implement their own leadership training processes. Cell-based South African churches such as Little Falls Christian Centre and Maranatha Community Church have developed their own proprietary approaches to leader development.

Reflecting the pervasive influence of modern educational paradigms, many South African churches that have ventured into church-based training use content-heavy, teacher-centered training programs rooted in a cognitive approach to learning. While these courses convey an abundance of information, few result in transformational leadership development.

This project offers South African churches a research-backed approach to the design of transformational, church-based processes of leadership development. It is this researcher's conviction that the adoption of the recommended practices and use of the design template would do much to increase the effectiveness of church-based leadership training initiatives in South Africa.

Though seminaries, bible colleges, and other institutions offer valuable training, the local church is God's primary crucible for the development of Christian

leaders. If we are ever to address the leadership crisis in the African church, then local churches must accept their responsibility to cooperate with the Holy Spirit in the development of biblically wise, well-equipped, Christlike leaders.

At the Gospel Coalition in 2011, Southern Baptist Theological Seminary president Al Mohler said,

If a young man has the opportunity to study with a pastor and be right in ministry alongside him all the time, that is going to be better than what you are going to get at any theological seminary anywhere on the planet.... The local church needs to train what only the local church can do. Pastors are the most effective trainers and educators of pastors.... You can't franchise out theological education. It belongs to the church of the Lord Jesus Christ (Antioch School 2011).

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