

Self-Directed Learning – Past and Present

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Abstract

The purpose of this article is to present various findings on self-directed learning (SDL). The article contains three main parts: historical foundation of self-directed learning, a summary of various literature reviews on self-directed learning, and an analysis of current research on self-directed learning. SDL has been a significant factor in Adult Education Literature, and the popular concept has been extensively researched.

Self Directed Learning (SDL) – Past and Present

Historical Foundation of Self-Directed Learning

Many researchers (Brockett & Hiemstra, 1991; Candy, 1991; Long, 1988; Merriam & Caffarella, 1999) refer to similar works that have laid the foundation of self-directed learning. Of special interest is the extensive survey conducted with academics concerning the most significant writing on SDL conducted by Confessore and Confessore (as cited in Long and Associates, 1992). The results in order of significance are: Tough (1979), Houle (1961), Long and Associates (1988), Brookfield (1985), Knowles (1975), Long and Associates (1989), Spear and Mocker (1984), Tough (1978), Long and Associates (1990), Brookfield (1986), Caffarella and O'Donnell (1987), Tough (1981) (as cited in Caffarella & Caffarella, 1992). The following discussion will outline the conceptual formulation of SDL and its recent developments.

Adult learning projects.

The concept of adult learning projects began when Alan Tough read the detailed transcribed interview data of Houle's (1961) research on the motivations of learners. Tough and his research team continued this study with a survey of 200 individuals and detailed interviews with 66 of the sample. Through detailed interviews and quantitative analysis, this research uncovered highly deliberate efforts to learn in nearly every segment of our society. Tough's (1971) survey disclosed that most adults complete one or two learning projects a year, and the average person completes eight. These learning projects are a highly deliberate effort to gain certain knowledge and skill. These projects average 700 hours a year per person, and some people will devote as many as 2000 hours

a year. This research revealed the individual plans 70% of the learning, with the rest by professionals or amateurs.

Self-directed, or self-planning is the predominant means of adult learning because of a variety of reasons (Tough, 1971). The learner knows what is the best course of action, or feels they would lose time by consulting someone else, may not trust others, or they may be more highly skilled than others. The learner decides everything from specific activities of learning to location, time, as well as make the payment. Tough found that most learning projects include four or five other human resources; most of this insight is from friends, neighbors, or acquaintances. Non-human resources are also paramount in this process such as television, books, pamphlets, and newspapers. Tough (1979) continues his crusade of self-directed learning by discussing how to promote self-directed learning and all of its interesting nuances from institutions to group learning.

Andragogy.

Andragogy not only captures the beginning of the adult education movement, but its timeless perspective applies to adult education in a multicultural world. Knowles (1985) was ardently attempting to educate young adults in vocational skills and could sense there was a specific difference in educating adults than children. He began to search for information that could help isolate these phenomena. After a series of work experiences, returning to school, and the influence of Eduard Lindeman and Cyril Houle, Knowles began to verbalize his ideas about this different kind of education that worked with adults. A friend from Yugoslavia, said, “You are doing andragogy....” (Knowles, 1985, p. 6). Andragogy had been used as a term in Europe for years to identify education with adults (Merriam & Caffarella, 1999).

Since most educators are familiar with pedagogy, Knowles (1985) defined andragogy in contrast with pedagogy. He lists the now familiar hallmarks of andragogy: the learner is self-directed, the vast experiences of an adult adds to knowledge, the learner is at a stage in life where he/she is ready to learn, adult learning is problem centered, and the adult is internally motivated. In addition, Knowles feels the facilitator of adult learning should create a climate conducive to learning, the learner will actively participate in every phase of this process, and that each learner would have a learning contract to carry out the process. Similar to Lindeman (1961) who referred to education as an art, Knowles calls andragogy the art and science of helping adults learn.

Critical perspective.

Like a lifeguard warning swimmers of a silent, hidden, and dangerous undertow, Stephen Brookfield (1985) sounds the alarm about the growing popularity of self-directed learning. Brookfield discusses the popularity of the concept of self-directed learning, and how Tough's learning projects (1971), Gugliemino's Self-Directed Learning Readiness Scale (as cited in Brookfield, 1985), and Knowles' delineation of andragogy (1985) have added fuel to the flame. Even though it has been easy to jump on this popular bandwagon, he asks us to consider if this concept actually promotes the ideas of adult education. Brookfield admits his own obsession as a graduate student with the book, "Learning without a teacher," today, Brookfield questions his enthusiasm.

On the positive side of criticism, he states that self-directed learning has clearly put the adult learner on the center stage and this research should be given credit for solidifying learning outside of formal education (Brookfield, 1985). Yet he stresses we must be aware of all that is lurking in the background. For example, where is the

guidance of a skillfully crafted teacher in the self-directed process? Another concern for Brookfield is the rapid acceptance of the term by the fields of continuing education and adult education; perhaps this promotion of the term reflects our field's need for acceptance in the harsh and critical world of the social sciences. He adds that self-directed learning is actually a misnomer, there is always the influence of other people through the resources of the self-directed learner. Yet more important, SDL could subtly be mirroring hegemony by reflecting the white majority in the USA and Canada (McIntosh, 1988).

Autodidactic learning.

Candy's (1991) writing on SDL seems to be a bridge between the extensive SDL research in the 1980's and the need for future direction. This comprehensive and theoretical book based on previous research, sets forth the autodidactic learner as the cornerstone of the learning society. Invoking this historical name, autodidactic implies an individual's non-institutional pursuit of learning in natural societal settings. Candy discusses the social implications of this free learning with its potential to eliminate social inequalities.

Similar to Brockett and Hiemstra (1991), Candy (1991) discusses the various myths of SDL. The primary myth is that SDL is carried out in isolation. Both authors discuss the social implications of learning, and ways that SDL is person situated. The focus of SDL seems to remain the same, the learner is in control of their learning, and this personal learning is intentional in its expression.

Summary of Historical Perspective.

Self-direction is more than a fad of adult education, and is actually one of the two pillars of adult education movement (Merriam, 2001). The concept of self-directed learning has been synonymous with advances in civilization and seen as the format for changing society through the empowerment of these personal projects (Brockett & Hiemstra, 1991; Candy 1991; Confessore, 1992; Jarvis, 2001).

Although highly influential, Tough's (1979) positive outlook on adult learning seems unrealistic; there is an underlying assumption that everyone wants to learn, knows how to read, and wants to engage in personal learning projects. Also, during the interviews there is a blurry line in learning projects, and recreation or leisure. A great deal of learning on one's own is for pleasure and recreation, yet it seems Tough was forcing this to become a learning project. He does discuss the difficulty of interviewing as well as difficulties in discerning learning projects.

Perhaps, Tough (1971) overstates the implications of this learning project, as if this is the pinnacle of life. He has shown how personal learning is a part of our survival as well as daily life, yet learning without a foundation of ethics may become a license for someone to learn destruction to self or others. Tough does not include negative aspects of learning; there is an assumption that everyone will learn how to care for a baby, how to garden, or how to exercise. What about terrorists that learn to make home made bombs, children that learn how to cheat in school, or drug dealers that learn how to concoct quickly made drugs? Is there a moral or ethical foundation to learning?

The critics of andragogy state these ideas do not meet the criteria of culturally based education, and in fact reflect western mindset (Pratt, 1993). Culturally diverse

education is characterized by a relationship between learning and one's unique culture (Wlodowski & Ginsberg, 1995), an acknowledgement of the different ways of knowing (Goldberger, 1996), and the incorporation of indigenous education (Cajete, 1994).

Brookfield (1985) continues this criticism by asking us to consider the effectiveness of the varieties of the reported self-directed learning. For example, he discusses that although Tough (1971) can count the hours of a learning project, yet does not seem to gauge the effectiveness or significance of the learning. Is it wise to consider an adult who learns to wire an electrical outlet the same as an adult who learns how to teach an immigrant to read?

Lindeman's (1961) frustration with vocational classes led to a realization that all of life is education. Houle (1984) saw people who were living their life in a way that characterized learning and inquiry and wanted to discover the secrets of their pattern. Tough (1971) decided to study and classify these patterns or learning projects even more by interviewing and detailed analysis. Knowles (1985) helped to popularize these ideas by writing about autonomous learners and describing a new way to educate adults. Brookfield's (1985) watchful eye has pointed to various concerns, especially that of overzealous researchers and samples that misrepresent the population. Candy (1991) claims we have laid the cornerstone for a new society through the empowering ability of SDL. The meaning of adult education has been expanded by careful research on global and personal learning of inquiring minds.

Since Tough's research on learning project of adults (1971, 1979), research in the area of self-directed learning substantially increased. There have been numerous research projects at various universities throughout the world, especially in the late 1970's and 1980's. The following authors are included because they are continually mentioned in the literature and they are knowledgeable in the field: Brockett and Hiemstra (1991); Merriam and Caffarella, (1999); Long and Associates (1988, 1992, 1993, 1996, 1998); Confessore and Long (1992); Long and Redding (1991).

Brockett and Hiemstra.

Brockett and Hiemstra (1991), include a comprehensive literature review focused on Allan Tough's research (1971), the two primary instruments of self-directed learning, the Self-Directed Learning Readiness Scale and the Oddi Continuing Learning Scale (as cited in Brockett and Hiemstra, 1991), and qualitative data as the new impetus in SDL research. Brockett and Hiemstra list significant research projects that were inspired by Tough's design with older adults; these are Hiemstra -1975, Ralston-1989, Hassan-1982, and Estrin-1986 (as cited in Brockett & Hiemstra, 1991).

The study on older adults by Hiemstra in 1975 (as cited in Brockett & Hiemstra, 1991) indicated that older adults are active learners and self planned; yet this self-direction may be masked to the researcher. This research involved a sample of 256 older adults at least 55 years of age. Also Ralston in 1989 (as cited in Brockett & Hiemstra, 1991) compared the differences between an older white and non-white sample on learning projects. Research did indicate more white participants, but the most important finding was that rather than race, higher educated adults were closer correlated to SDL.

This research involved 110 participants with an average of 2.45 learning projects per year. Hassan in 1982 (as cited in Brockett & Hiemstra, 1991) investigated rural adults in Iowa and found SDL was a way of life for this population. Out of the 77 adults chosen for this study, 37% were at least 55. These adults were involved in 9.7 learning projects a year. Estrin in 1986 (as cited in Brockett & Hiemstra, 1991) showed SDL is a way of life and is related to life satisfaction by examining a sample of older women living in subsidized housing.

Brockett and Hiemstra (1991) continue their discussion of literature by challenging researchers to expand the knowledge base through qualitative research. This “going beyond the iceberg” (p. 83) has the potential to reach samples that may be overlooked by traditional statistical measures.

Of special interest to this research is the work by Leean and Sisco in 1981 (as cited in Brockett & Hiemstra, 1991). They investigated SDL in older rural adults in Vermont with less than 12 years of formal education. This 18-month project involved case studies with 14 participants. Three researchers spent 14 hours with each participant. The major findings were that SDL occurs in non-rational means such as activities of everyday life, when one is alone, and through individual thought processes and impressions. The participants described SDL Maslow’s (1970) peak experience.

Long and Associates and Others.

Long and Associates have added significantly to the literature on self-directed learning. Similar to the work of Brockett and Hiemstra (1991), this group of researchers has collected and summarized a great body of writings on self-directed learning. Several

books (1988, 1992, 1993, 1996, 1998) have attempted to address broad spectrums of self-directed learning and to summarize findings in the field.

Long joins with Confessore (1992) in compiling various abstracts on SDL from 1966 - 1991. This contained eight abstracts concerning older adults. Baltes, Kliegal, & Dittman-Kohli's 1988 (as cited in Confessore & Long, 1992) study focused on adult learning with results showing a large share of training improvement by the elderly in fluid intelligence. The sample of 147 older adults with an average age of 73 was divided into comparison groups. They found that SDL has potential to help older adults with specific health related issues.

Brockett (1985) continued his emphasis on readiness for learning and analysis indicated a significant positive relationship with learning readiness and life satisfaction. This study had a sample of 60 older adults with a minimum age of 60. Brockett's (1987) study with a sample of 64 and a minimum age of 60 affirmed the previous study and showed that there is a positive relationship with life satisfaction and SDL.

Fisher, in 1983, 1986, and 1988 (as cited in Confessore & Long, 1992) indicated the positive relationship between formal education and SDL; this confirms Ralston's – 1989 study (cited in Brockett and Hiemstra, 1991). This study had a sample of 786 older adults. This study focused on involvement in education and its impact using questionnaires, the Anomia Scale, and the SDL participation index. Participants differed significantly from non-participants in level of educational attainment, anomia, the propensity to engage in SDL, and in awareness of SDL activities. Long and Smith in 1989 (as cited in Confessore & Long, 1992) with a sample of 49 and a minimal age of 65 tested the reliability of the SDLRS on older adults.

Significant for this research is Pevoto's 1989 study (as cited in Confessore & Long, 1992). This qualitative paradigm focused on thirty-three participants and attempted to discover why these individuals were not participating in organized learning activities in senior centers. Findings indicated low self-image prevented over half from participating, also influential was a lack of interest in the topics and a preference for SDL over a formal class. His findings also showed the importance of continuing education in older adults, and that lack of a formal education is not seen as a barrier to continuing education in older adults.

Long joins Redding (1991) in a synopsis of self-directed learning dissertation abstracts, similar to the above compilation, this primarily focuses on dissertation abstracts within a 25-year period, 1966 - 1991. The three studies out of this compilation that related to this research are the following: Diaz -1988, East -1986, and Sears-1989 (as cited in Long & Redding, 1991).

Diaz's 1988 (as cited in Long & Redding, 1991) dissertation focused on the relationship of life satisfaction and self-direction readiness. The scales of Solomon/Conte Life Satisfaction and the Self Directed Learning Readiness were incorporated with Spanish speaking older adults. Out of the 142 participants from south Florida aged 65 – 72, there was a significant relationship between the two scales. Similar findings were with the East -1986 and Brockett -1982 (as cited in Long & Redding, 1991), all incorporated the SDLRS on older adults to understand the relationship with life satisfaction. The positive relationship between life satisfaction and self-directed learning seemed to be established as a result of these findings.

Sears in 1989 (as cited in Long & Redding, 1991) continued the study of Tough's (1971) work by interviewing 120 people incorporating Tough's interview guide. Starting from a pool of 20,032 eventually 400 were chosen for the study, and 120 agreed to participate. Rather than looking at learning projects over the lifespan, they focused on learning projects of the previous year. There was an average of two learning projects per person, and that books, pamphlets, and newspapers are a primary source of information for older adults. Older adults value SDL and are motivated for self-planned self-directed learning projects.

Summary of Research in Literature Reviews.

This review of the history of self-directed learning with older adults has focused on 146 articles, 412 abstracts, and five literature reviews through the lens of Brockett and Hiemstra (1991), Merriam and Caffarella (1999), Long and Associates (1988,1992, 1993, 1996, 1998), Confessore and Long (1992), Long and Redding (1991), and Caffarella and O'Donnell (1987).

Several important elements remain. 1). One cannot read research on SDL without acknowledging the influence of Allen Tough. His work is lauded in every literature review and is recognized as the beginning of research on self-directed learning. 2). The influence of Gugliemino's SDLRS gave researchers impetus to attempt to quantify this growing body of evidence. Of the 15 studies outlined in this segment, nine incorporated the SDLRS. 3). This led to a growing body of qualitative paradigms which have attempted to fill in the gaps left by quantitative measures by conducting research on overlooked groups. 4). Long defends the applicability of SDL to all aspects of culture, arguing against Brookfield's stance that SDL reflects hegemony.

Because of this research we can say the following. 1). SDL exists and is evident in each segment of society, especially noted in research of Penland, McCune, Fisher, Diaz, and Leann & Sisco, (as cited in Brockett & Hiemstra, 1991). 2). SDL is a way of life and is positively related to life satisfaction and seems to increase with formal education experience (Long & Associates, 1988, 1992, 1993, 1996, 1998). 3). SDL is the primary way that adults learn; adults incorporate SDL in unique personal ways (Caffarella & O'Donnell, 1987; Merriam & Caffarella, 1999), and 4). SDL is tied to a person's self-concept, and can be a significant positive influence in the lives of older adults (Brockett & Hiemstra, 1991).

Qualitative research helped to address the gaps left in the beginning interest of SDL. Several significant studies have added foundational knowledge to the concept of SDL. These include, Gibbon's explanation of experts without formal training, Brookfield's social dynamics in learning, and Spear and Mocker's explanation of how SDL is an evolving construct from the context of one's life (as cited in Brockett & Hiemstra, 1991).

More important to this study, is the overall lack of attention to older adults. Although there were three qualitative studies, Sears in 1989 (as cited in Long & Redding, 1991), Pevoto in 1989 (as cited in Confessore & Long, 1992) and Leann and Sisco in 1981 (as cited in Brockett & Hiemstra, 1991) and 12 quantitative studies on older adults, this pales in comparison to the number of studies represented in these books. Of these 15 studies, none made a connection of SDL to adult development. This reflects a significant gap of qualitative research in the literature of SDL.

Recent Research on Self-Directed Learning

The purpose of this section is to focus on academic research and other related material within the last 15 years. Recent academic research and other related material could be located at the Self-Directed Learning Website. Retrieved on October 2001 [web.utk.edu/~dlf/SDLR/Links.htm]. One of the links in this website is an ongoing evaluation of research within the last 20 years. Retrieved on October 2001 [notes.utk.edu/dii/df/sdl.nsf]. This peer-reviewed research on SDL covers 19 journals within the field of education.

From 1980 – 1999 there have been approximately 167 studies in the field of SDL. Showing the need for more attention to older learners, only five of these articles concern the elderly, and there were no qualitative studies concerning the elderly SDL.

In addition to this, a recent perusal through the last twenty years of *Adult Education Quarterly* revealed 12 specific articles focused on SDL. Six of these were involved with Oddi or Gugliemino's measures, one was a literature review, and the other six expanded on the concept of SDL and are included in this review. Information concerning older adults and SDL in the last several years can be categorized around the following four categories.

SDL as a means for gaining specific information.

The powerful potential of SDL is its applicability to any subject and any learner. Older adults have diverse health concerns as well as a wide variety of interests. Long's (1993) discussion of dissertations focused on three with specific topics, these were back pain by Cross in 1988 (as cited in Long, 1993), myocardial infarction by Sedore in 1988 (as cited in Long, 1993), and finances by Furry in 1985 (as cited in Long, 1993). Other

growing interest is the potential of learning specific information over the Internet as well as in distance education (Garrison, 1987; Timmerman, 1998).

Similar research by Yamanda (1994) indicated how SDL enables learners to continue to stay involved in life through institutions that focus on elderly programs. She encourages the use of SDL in institutions for the elderly, because of its established impact on life satisfaction. Long and Zoller-Hodges (1995) have shown the positive impact of formal programs such as Elderhostel. Older adults can utilize such formal programs such as Elderhostel to augment personal study projects, or other areas of interest. There are benefits for older adults and for society as they continue to learn, and educators should consider how to include older adults in their activities (Long & Zoller-Hodges; Withnall, 2000).

SDL is a potent force against premature decline and for empowerment.

Like a pharmacist dispensing prescribed medicine with counseling, several writers have espoused the power of SDL in its potential to empower older adults as well as help to prevent premature decline.

Neikrug et al. (1995) discovered insight on the influence of learning in oldest-old adults. This fast growing segment of the population have different needs than many older adults, for example, most of their grandchildren are also adults. Consequently, these oldest-old are more involved with their own life; they seem to enjoy time with friends as well as learning at home. This inspirational study of older adults indicated learning was an enjoyable way of life and kept them involved.

Other writers similarly have discussed the power of learning throughout the lifetime. In this rapidly changing world, there is a need to continue to learn, or one can

easily fall behind. However, learning can go beyond just simple daily projects of arts and crafts to personal change, social justice, as well as challenging the status quo for a better world. This personal empowerment will enable older adults to meet the challenges of their lives as well as design personal projects to meet personal needs, rather than waiting on traditional institutions to offer classes or seminars for their particular needs (Cusak, 1995; Field, 2001; Foley, 2001; Hiemstra, 1998; Lamdin, 1997; Mason, 1974; Withnall, 2000). Cusak (1995) utilizes older adults as interviewers in talking with other older adults about improving learning. Kroth and Boverie (2000) found that older adults with a life mission were motivated to continue to learn based on their particular mission. This qualitative study on older learners indicated a positive relationship between one's life mission, SDL, and transformation.

Uniqueness of Adult Learners.

Even though there is a great amount of research that attempts to quantify the SDL experience, a closer look reveals each learner is unique. This is especially true of older adults; each person arrives at old age vastly different because of the varieties of paths each has chosen (Eisen, 1998).

Barber and Kozoll's (1994) practical perspective for instruction point out the importance of incorporating these personal differences among instruction with older adults. Although a variety of writers may categorize age 60 – 85 as similar, there is a great deal of differences evidence by physical limitations and motivations to learn. Older adults are different because of 65 years of individual growth and change, creating a personal environment unique to no one else (Jarvis, 2001).

Knowles, Holton, & Swanson (1998) have attempted to describe the much-aligned process of andragogy as a flexible perspective. The flexibility of andragogy, combined with the unique situation of each older adult, allows for full expression of SDL. Similarly Hake (1999) discusses how intentional learning can become a biographical resource for individuals in the strategic planning of individual life courses, that despite universal distribution of threats and risks posed by modernization, individuals differentially develop the capacity to independently organize their biographies. This biographical competency is the key competency to enable individuals to cope with the risks associated with transitions and critical life events, ensuring survival in late modernity.

SDL often occurs in leisure.

Because many older adults have retired, or have been replaced by younger workers, or simply have chosen to slow down, they have an increase in leisure time. Adult educators may overlook this foundation of SDL. Verduin and McEwen (1984) and Verduin, Miller, and Greer (1986) have shown how leisure time is often utilized by older adults for SDL. One of the main arenas of adult education is to help adults to learn experiences that will enable them enjoy and enrich ones life. With adults living longer, retiring earlier, and having more free time, there is greater amount of leisure time, as well as recreational pursuits (Mason, 1974). SDL can be specifically suited for learning about important activities in leisure, for example golf has been shown to have a contribution to successful aging (Siegenthaler & Thomas, 2001). This learning can take place in home, libraries, outdoors, other nontraditional places (McGuire, Boyd, & Tedrick, 1996). Kleiber (1999) and McGuire et al. discuss the compelling evidence of leisure experience

in coping with the loss and limitations of aging as well as leisure's role in adult development.

If an older adult desires to learn something that may not be available in a formal program, they will often turn to SDL. This leisure learning is experiencing tremendous growth, especially from adults over 50 years of age (McDaniel, 1986; Verduin, Miller, & Greer, 1986). Other important topics for learning in leisure are volunteering (Stergios & Carruthers, 2001), personal reflection (Foley, 2000), and travel (Roberson, 2001). For example in Lamdin's (1997) extensive research project, travel was listed as the favorite way to learn.

Travel is the best revenge against aging...when we take a trip and enter unfamiliar settings, we reconnect with our childish sense of wonder and discovery, and we discover an unexpected bonus, the clock slows down and life seems to expand....

(p. 139)

Summary of Recent Research.

In summary, recent research indicates SDL is appropriate for discovering specific topics, SDL is a powerful force against the negative aspects of aging, each self-directed learner is unique and SDL occurs within the agency of leisure.

Conclusion

SDL has a substantive foundation and compelling history; perhaps SDL is the key to understanding the history of adult education. Its positive impact and wide spread influence indicates its natural role in learning and perhaps survival in life. SDL disarms hegemony by allowing everyone a chance to direct his or her own learning. History is

replete with successful self-directed learners, and perhaps SDL is the venue for a changed world. Candy (1991) summarizes these thoughts,

Self-directed learning is at once a social and psychological construct, a philosophical ideal, and a literal impossibility... the beginning and end of lifelong learning...keystone of the learning society; a supplement to and substitute for the formal education system; a vehicle for the mastering of established knowledge and for the transformation of personal understanding.... (p. 424)

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