9 Self-planned learning

We are now at the point where the person has decided to begin learning and has chosen a planner. Two chapters are now devoted to self-planned learning because it is so common and important. This chapter describes the present picture, and the following chapter suggests ways of improving self-planned learning. Subsequent chapters describe learning projects planned by someone other than the learner himself.

Why Is Self-Planned Learning So Popular?

Over the years, several educators have discussed various learning efforts that are somewhat similar to self-planned learning projects, but not identical. They have labeled their phenomena in various ways: self-education, self-instruction, self-teaching, individual learning, independent study, self-directed learning, self-study. While engaged in such efforts to learn, individuals have been called autonomous learners, self-propelled learners, self-teachers, and autodidacts.

Throughout history, and throughout the world, self-planned learning has been common and important (Grattan, 1955; Houle, 1961, pp. 10-12; Kidd, 1959, pp. 9, 46-47; Kulich, 1970). As mentioned previously, 68% of all projects in our 1970 survey were self-planned and, in addition, most of the mixed projects (another 9% of all projects) were partially self-planned.

Why is self-planned learning so popular? Why does the learner usually handle the detailed planning himself, instead of turning to someone else? Even though he may go to various sources for suggestions on the details of what and how to learn, why does he retain the primary responsibility himself? Several reasons may account for this.

1. The learner may believe that he would actually lose time in the long run by turning the responsibility for planning over to someone else.
2. He may be confident that planning the learning episodes for the particular knowledge and skill he desires will be easy, and that the content will be readily available.

3. The learner may not be able to see past the next two or three learning episodes. He may not be sure how much longer he will continue the learning project, and may think that the direction or subject matter will change soon. Consequently, he does not want to commit himself for a long period of time to a particular object, person, or group. He does not want to give up the possibility of shifting the subject matter significantly or frequently.

4. Using oneself as a planner avoids any difficulty in locating, selecting, and using the planner. The learner knows that he himself is available, whereas the other three types of planners may not be available in his community at the time he wants to begin the learning project. The learner may not want to bother investigating and choosing some other planner. He may be shy or reluctant to approach other people or an institution. The learner himself as a planner is always available at any time of the day or night, without an appointment or schedule, and without cost.

5. The learner may be reluctant to let others direct his learning project in case their procedures produce in him some inappropriate beliefs, attitudes, habits, or techniques.

6. The learner may be highly skilled at locating printed materials, and at quickly selecting and grasping their relevant ideas. Consequently he feels no need for another person or group to present the subject matter to him. He may also want to be free to read and reread any portion of a book, for example, in any order he wishes. Consequently he feels he would be frustrated by the relatively inflexible sequence imposed by other sorts of nonhuman resources.

7. The learner often has greater insight than anyone else into his own capacities, preferred methods, goals, needs, pace, and emotional blocks to learning.

8. The learner may expect to discover, invent, or synthesize the knowledge and skill because no one else has yet done so. The desired knowledge and skill may be unique: no one else is trying to obtain it. This is true of certain political decisions, research questions, and personal problems, for example.

9. In order to deal with a certain problem, the learner may want to gather a variety of possible solutions from several sources before selecting the best solution.

10. The learner may be especially likely to choose self-planning if he is self-reliant, independent, and autonomous.

11. He may expect to feel especially proud or pleased if he successfully plans his own learning, or he may hope to impress others.

What Steps Does the Learner Take?

In order to gain the desired knowledge and skill, the learner or someone else must make many detailed decisions and arrangements. Because each of these is preparation

for a successful learning episode, we call them *preparatory steps*. In a self-planned learning project, by definition, the learner himself is responsible for most of these day-to-day decisions and arrangements, especially the decisions about what and how to learn in each episode.

Some preparatory steps are necessary for making the basic decision about whether and what to learn; others are necessary for choosing the planner. These two clusters of steps have already been discussed in Chapters 6 and 7. To a large extent, these steps are performed near the beginning of the learning project. Throughout the project, though, the learner may occasionally reexamine or modify his earlier decision.

In this chapter, we leave the early comprehensive steps and move on to the day-to-day steps. These detailed steps are the "executive" steps: the specific decisions and arrangements, from one learning episode to the next, necessary for completing the project successfully. The policy or legislative steps have already been taken: the comprehensive goal and the planner have already been chosen. Now the detailed plans for implementation are required. Each learning episode must be planned.

The list

Several years ago, I began trying to develop a list of preparatory steps that the learner sometimes takes in a self-planned learning project. An early list, developed from exploratory interviews and a variety of literature, was tested in 40 intensive interviews (Tough, 1967), and additional tasks were suggested by the learners. These new tasks were then tested with 42 part-time graduate students who had done an independent study project. Through further thought and interviewing, Heather Knoepfli contributed a great deal to the present list.

The preparatory steps performed by the self-planner can be viewed at several levels of comprehensiveness. At a macroscopic level, the learner directs the general flow of the entire learning process. In order to do so, he frequently reflects on the current situation, decides the next detailed strategy and content, and evaluates the effectiveness of his choices. At the other extreme, he performs hundreds of tiny particular actions while planning and arranging the learning project.

The following list of possible preparatory steps is somewhere between the two extremes. It contains 13 clusters of steps, each of which is fairly general, common, and important. The list has been based on experience and interviews as well as on logical analysis.

1. Deciding what detailed knowledge and skill to learn. As part of this step, the learner might try to detect specific errors in his current knowledge, or specific weaknesses in his current skill or style.
2. Deciding the specific activities, methods, resources, or equipment for learning. As part of this preparatory step, the person could study his own particular needs, or decide the criteria to be used in selecting a particular resource. He could also

gather information on the advantages, weaknesses, accessibility, level, and suitability of certain resources or activities. He might glance at several books or articles, perhaps in a library or bookstore, before selecting the most appropriate. He might decide what sort of person could provide the needed subject matter, and then try to locate the particular person who would be most suitable. As part of deciding whether to use a certain activity or resource, the learner might try it out for a short time.

3. Deciding where to learn. The learner may select a quiet, comfortable place that will be free of interruptions, or he may need a place in which certain facilities, equipment, or resources will be available.

4. Setting specific deadlines or intermediate targets.

5. Deciding when to begin a learning episode.

6. Deciding the pace at which to proceed during a learning episode.

7. Estimating the current level of his knowledge and skill, or his progress in gaining the desired knowledge and skill. ·

8. Detecting any factor that has been blocking or hindering his learning, or discovering inefficient aspects of the current procedures.

9. Obtaining the desired resources or equipment, or reaching the desired place or resource. As part of this step, the person may spend time traveling, trying to find a certain book in a library, ordering a book or other particular resource, obtaining permission to use certain facilities, or arranging to see a certain individual.

10. Preparing or adapting a room (or certain resources, furniture, or equipment) for learning, or arranging certain other physical conditions in preparation for learning. This step could include installing an air-conditioner or soundproofing a den, or putting a film or tape into a projector or recorder.

11. Saving or obtaining the money necessary for the use of certain human or nonhuman resources – perhaps for buying a book, renting equipment, or paying for lessons.

12. Finding time for the learning. This step can involve reducing or reorganizing the time spent at work, family activities, or recreation. The learner may have to ask his employer or wife to reduce the other demands on his time, or ask someone to take over some of his usual responsibilities for a while.

13. Taking certain steps to increase the motivation for certain learning episodes. The learner might want added motivation to increase the frequency or pace of his learning episodes, or to increase his pleasure, effort, or concentration during them. Possible substeps are (a) dealing with lack of motivation for achieving the action or learning goal; (b) increasing one's pleasure in the learning situation, or one's interest in the learning activities or subject matter; (c) dealing with the feeling that the current strategy or particular resources will not be effective in achieving the desired knowledge and skill; (d) dealing with lack of confidence in one's capacity to learn, or with doubts about one's likely success in the learning

project; (e) overcoming feelings of frustration and anger caused by difficulties; and (f) telling someone about one's delight.

How Competent is the Planning?

Our list indicates that planning a learning project can be a complex and delicate task. Many of the decisions and arrangements are difficult, for the learner is operating in a field (or level) of knowledge and skill that is new to him.

There is a wide range in the ability of adult learners to plan and arrange their own learning. Some are inept at planning and guiding any sort of learning project. Many are fairly successful in most of their self-planned learning projects. Some highly competent adults plan a remarkable variety of successful learning projects.

Only rarely will a learner sit down alone at the beginning of a learning project and plan his detailed strategy for the entire project. For, in a field that is new to him, how can he know what books are most useful? In learning a new skill, how can he know what components to practice, or in what sequence? How can he predict the emotional blocks and other problems that will arise later in the project?

In short, at the beginning of a project, the learner usually lacks the information and competence to plan the entire learning project. But he can obtain the information and develop the competence. He may seek advice about strategy, activities, resources, equipment, and even pace from various individuals and printed materials. After evaluating the information and suggestions, he decides his detailed subject matter and strategy for the first few learning episodes. As he proceeds, he may modify his strategy.

With the available evidence, it is difficult to estimate how much time the learner spends at planning. In one study on self-planning, an estimate of 21 hours per project was obtained (see Table 5 in Tough, 1967). In our 1970 survey, the learners spent a mean of 7 hours at planning each self-planned project; the median, though, was only 2 hours.

Estimating competence and success

Learners are often concerned about how well they are guiding their own learning. They seek feedback and confirmation of their success by comparing, for example, their level of performance or knowledge to that of others. One man's evidence for his self-mastery of a field was his ability to talk intelligently with experts in the field, and to ask them several meaningful questions. Another man claimed he had successfully mastered Toynbee while a hospital patient by citing the fact that several

doctors began spending their coffee hour in his room to discuss his previous day's reading. Other learners may measure their success by the amount they learn, or by their own enthusiasm and satisfaction.

A few studies have used test scores or outside observers to assess the learner's planning. Examples of these are Bivens, Campbell, and Terry, 1963; Newman, 1957; Ault, cited on page 407 in Olson, 1959; Ryan, 1965; Tough, 1967, pp. 74-75. In these studies, learners who planned their own efforts were at least as efficient and successful as other learners.

Amount of Help with the Planning

It is possible to imagine an adult deciding all of the detailed day-to-day content and strategy for a learning project without any help whatsoever from any other person or resource. He would choose his books and other subject matter resources, and make various plans and arrangements, without obtaining any information or advice. He would base his decisions on the information he already possessed, rather than seeking any new information from an outside source. He would rely on outside resources for actually providing the subject matter itself, of course, but not for his preparatory steps.

We have not yet found an actual example of this imaginary picture. It seems clear that few if any learners decide their detailed content and strategy without help. On the contrary, during a self-planned project, the typical adult obtains an astonishing amount of help from a large number of individuals and other resources.

During some of the open-ended exploratory interviews for a previous study (Tough, 1967), I was impressed by the way in which some adults organized their account of their self-planned projects. They recalled and described such projects by means of the individuals and other resources that had helped them. Their narrative revolved around their experiences with first one resource and then another. Several of these helpers and books had a great impact on the learner's progress. It became evident that the learner's relationship to his social and physical environment is extremely important in his efforts to plan a learning project.

Despite this forewarning, I was surprised by some of the findings of the study itself. The 40 interviewees, in 40 self-planned learning projects, obtained definite help from a total of 424 individuals. This is a sharp contrast with some classrooms, in which the 40 learners receive most of their help from only one individual. All 40 learners in this study definitely received help from at least 4 individuals, through direct contact and interaction. The average learner obtained help from 10 individuals, and a few learners from more than 20. Several other measures, too, demonstrated the great importance of help in self-planned projects (Tough, 1966, 1967). All of this help concerned the planning and directing of the project; resources that merely presented subject matter were not included.

Such helpers – friends, colleagues, acquaintances, family members, subject matter experts, sales persons, and librarians – do not *control* the learning project. Although the learner receives advice, information, encouragement, and subject matter from several individuals, he makes the decisions himself.

The learner himself retains the primary responsibility for planning and guiding a self-planned project. However, he does not operate in isolation from other persons, objects, and groups. Instead, he seeks and obtains a very large amount of advice and encouragement. In addition, though, he is likely to feel the need for even more help than he actually obtains. The resources help the learner with a variety of preparatory steps: deciding his learning activities, obtaining other resources, dealing with lack of motivation, estimating his level of learning, and so on. The help with the planning (and with the subject matter) comes from many varied resources, not just from one or two individuals or objects.

How Does the Learner Seek Help?

Certain chronological sequences of events are fairly common in the process of seeking help. Ray Devlin, for example, while a graduate assistant at the Ontario Institute for Studies in Education, identified five steps in the help-seeking process: (1) the learner develops a general awareness of the need for help; (2) the learner becomes fairly specific about just what he needs; (3) he selects a particular resource, perhaps after seeking advice about this decision; (4) he decides how to approach the individual or obtain the resource; (5) he takes that action.

The help-seeking process is not always rational and straightforward. Sometimes, for instance, it is best for the learner to take a certain step without thinking about it too much. One woman, for example, on impulse, went to a store to buy a guitar. She did not reread her consumers magazine article about guitars, and did not consider how expensive a guitar would be. If she *had* taken these rational steps, she might never have found the courage to proceed with the purchase.

Often a learner receives *unanticipated* help from some resource. He may seek one sort of help, and obtain several others in addition. Sometimes he does not even seek the resource in the first place: he may happen to notice a book on a coffee table, or may bump into some relevant person. As soon as he sees the resource, though, or when he becomes familiar with it, he realizes that it can help with a certain step.

Sometimes a learner will approach a certain individual or organization because he hopes for some sort of help, but does not really know what. His primary intention may be to find out what sorts of help this resource can provide. Or he may realize that just describing a problem or necessary decision to someone else can be helpful.

The choice of a particular resource, too, may be based primarily on emotional or nonrational considerations. Using a list of 50 items, for example, Mairi Macdonald's

doctoral study (1968) found that the least important reasons for choosing a particular helper were his expertise, his education, his relevant experience, and the recommendations of others. Instead, the helper was chosen because the learner expected to feel comfortable and relaxed with him. The learner predicted he would be able to talk freely and easily with this helper, would not feel awkward or embarrassed, and would not feel he was imposing on the helper or irritating him.

Needed research

One of our ultimate goals is to design and provide more effective help for adult learners. In order to do this, we must first understand how help fits into a learning project. In particular, we must understand the sequence of events, feelings, decisions, reasons, and perceptions that result in a learner seeking or receiving help from a particular resource. The entire process is important: becoming aware of needing certain help; having certain feelings and perceptions about that need; deciding how and where to seek help; succeeding or failing to obtain the desired resource or help.

Within this overall process, many specific questions arise. What experiences during self-planned learning make the person aware of his need for help? What specific help does he seek, and with what tasks and difficulties? How do learners feel about needing help during a self-planned project? How much time do learners spend deciding about help? How difficult are these decisions? How accurately do learners diagnose what steps require help, and what resources can provide it? Do some learners try to estimate the optimum amount of help, thus avoiding any wasted time from seeking too much or too little? Do learners typically get enough help, or are they often frustrated?

What Resources Does the Learner Use?

During a self-planned project, the learner usually finds that his interaction with several individuals and objects is relevant to his planning and arranging. Friends may offer information or suggestions. His wife may encourage him to speed up his pace, and to feel more confident about his likely success. A television program may stimulate him to pursue additional aspects of the topic. Several books may suggest additional resources or activities for further learning.

Most of these interactions with the environment will facilitate his learning, but one or two may be neutral or may even hurt his progress or motivation. We will use the term *particular resource* (or just *resource*) to refer to each individual and object with which the learner has some contact that affects the learning project. A list of

particular resources for any one project would be very detailed and would include every specific person and object that affected the learning.

Up to this point, we have discussed resources that help the learner decide whether and what to learn, choose the planner, and make day-to-day decisions about detailed strategy and content. All of these are preparatory steps. Now we will turn to resources that provide subject matter. For purposes of analysis and research, it is often useful to distinguish when a resource is helping with planning and when it is providing content or subject matter. But in actual practice, the same book or conversation may provide both sorts of help. It may, for example, present the knowledge (or demonstrate the skill) and simultaneously increase the learner's motivation or suggest some other activity for further learning.

Human resources

In self-planned learning, almost every learner uses at least 4 or 5 human resources. Many use 10 or even 20. In most projects the majority of these helpers are friends and acquaintances, colleagues, members of the learner's family, and neighbors.

Certain other persons, as part of their occupation, have a responsibility for helping adult learners. These people include certain doctors, nurses, pharmacists, lawyers, judges, executives, supervisors, religious leaders, professors, extension agents, community development workers, counselors, sales persons, librarians, consultants, professional athletes, social workers, and instructors. A learner may approach such a person because he is an expert in the desired subject matter, because he has been trained to help adult learners, or because of certain personal qualities.

In addition, many persons have a message that they want to communicate. These persons include authors, advertisers, technical specialists and engineers (regarding one product), poets, film-makers, television writers and producers, and artists. The adult learner may, as part of his learning project, read or watch their message.

Some learning projects rely on an astounding number of human resources. A political, military, or industrial leader, for example, may rely on a large network of people responsible for collecting, evaluating, and summarizing information for him. They may gather the information through investigation, research, espionage, or reading. They may test the information by experience, discussion, computer simulation, or pilot programs.

Sometimes contact with a fellow learner, too, is valuable. This interaction may greatly influence the person's goals, attitudes, basic conceptions, motivation, and specific directions.

Several researchers have studied the extent to which learners receive help and information from various types of persons. Examples are Hoeflin (1950), Jahns (1967), Sharma (1967), and Tough (1967). It seems likely that almost every adult is capable of providing some sort of help with some learning projects. Every adult is a potential helper as well as a learner.

Nonhuman resources

The learner may also obtain various sorts of help from a large number of nonhuman resources. Almost all learners use several nonhuman resources in addition to at least four or five human resources. One man preparing for his new job as a national education director, for example, obtained definite help from 39 books and pamphlets (through 5 libraries), 2 advertisements, 8 helpers, and 1 guided tour – a total of 55 particular resources.

As this example demonstrates, printed materials are especially common. Books, monographs, professional and technical journals, popular magazines, newspapers, bibliographies, workbooks, self-improvement books, and duplicated documents are examples of printed resources. Platt (1966, Chapter 1) has speculated on the growing importance of microbooks. Programmed instruction and computer-assisted instruction are also becoming more common and sophisticated. Journals are experimenting with new formats and services.

A learner may already own various printed resources that are relevant. Dictionaries, encyclopedias, home repair manuals, and books on child care are often bought for future learning projects, not current ones.

Reviewing the achievements of magazines since 1900, Peterson (1964) found that "for millions of Americans, the magazine was an inexpensive instructor in daily living. It counseled them on rearing children, on marital and financial problems, on getting along with one another. It told them how to furnish and decorate their homes, how to tend their gardens, how to prepare food nutritiously and inexpensively [p. 450]."

A lecture delivered more than 130 years ago (Channing, 1838) foresaw the great potential of printed materials in self-planned learning. "One of the very interesting features of our times is the multiplication of books, and their distribution through all conditions of society. At a small expense, a man can now possess himself of the most precious treasures of English literature. Books, once confined to a few by their costliness, are now accessible to the multitude. . . . The results must be, a deliberateness and independence of judgment, and a thoroughness and extent of information, unknown in former times. The diffusion of these silent teachers, books, through the whole community, is to work greater effects than artillery, machinery, and legislation [p. 24]."

Other important nonhuman resources at the present time are television, radio, films, displays, exhibits, recordings, language laboratories, and training and simulation devices.

The learner may also look at finished products (if he hopes to make one himself). Or he may learn by observing his human or physical environment, perhaps after trying to manipulate it, and by reflecting on his observations. Here his resource is a natural event or phenomenon, such as an emotional reaction or a group process, rather than a person or product, that is presenting certain words or pictures to him.

Researchers discover new and original knowledge in this way. Many other learners, too, during at least some of their learning episodes, simply observe people or natural events, or reflect on their previous experiences.

In addition, the learner may manufacture some resource for himself. One fascinating example of this is the "behavior graph" studied by Schwitzgebel (1964) and Kolb, Winter, and Berlew (1968). The learner makes a graph on which he then records the behavior he is trying to change. After each day or session, he may record how many cigarettes he smoked, sundaes he ate, daydreams he had, or errors he made. He may keep track of his weight, speed, exercises, or progress toward other goals.

In any self-planned learning project, the array of human and nonhuman resources is impressive. Reflecting on all of a person's learning for an entire year, or even a lifetime, points up even more the very large variety of resources that one learner uses in our society. Such reflection also makes it clear that no single individual, object, or institution aids more than a small portion of a person's learning during his lifetime.

Needed research

Much more research is needed about resources. Is it possible to develop an exhaustive list of all types of resources? Which types of resources are especially common and useful in self-planned learning projects? How many particular resources are used in each learning project? What characteristics of the subject matter, the learner, and the resources influence his choice? What difference does his choice make?

In order to tackle these questions, researchers will have to (1) develop a single set of mutually exclusive types of resources, or (2) develop and use a list of several variable characteristics. The first approach would develop a set of categories ("types of resources") into which all particular resources could be classified. Researchers could use such gross categories as a person, a book, and a real-life phenomenon, or could develop a fairly detailed classification scheme. It is unlikely, though, that all researchers will agree on a single scheme.

The second approach would develop several continua to describe the major variable characteristics of particular resources. Perhaps some variables would apply either to persons or objects, but not to both. With a person, for example, we might be interested in the extent to which providing help to the learner is part of his job, how intimate or remote the relationship is, how much the person knows about the subject matter, the extent of his experience and skill in helping adult learners, and the extent to which he was approached as an individual rather than as a representative or employee of some institution. We might also be interested in his age, sex, level of education, occupation, geographical proximity, and intention.

Either approach would benefit from trying to understand how the *learner* perceives the resources. Does he choose the type of resource before selecting a particular

resource? What characteristics of resources are in his mind when he chooses them? His perceptions could influence the type of list that we develop.

The situation in which help is usually received could also be studied. How much time does the typical learner spend alone with no resource? To what extent does he receive his human help in a one-to-one situation, in a small group, in a large group, through a third person, by mail, and by telephone? Within what context, program, or institution (if any) are certain of the resources located?