Chapter 7

The Learner in Distance Education

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As we begin to understand the motivations and characteristics of the learner in a distance education environment, clearly a comparison to an “adult learner” is not only meaningful, but also very helpful. This vision of the distance learner as an adult learner is drawn from one of the most essential demands that distance education environments place on the learner – being able to effectively work and learn in a self-directed learning situation. Garrison (2003) says, “The concept of self-directed learning has considerable potential to help distance educators understand student learning” (p. 167). As we move ahead in this chapter, dealing with the learner in distance education, we will be using the terms “adult learner,” “distance learner,” and “self-directed learner” in interchangeable ways. To be an effective distance learner demands a high degree of self-discipline and structure, which is the same as that demanded in self-directed learning and is the basis for effective adult learning.

In this chapter we will be looking at key concepts and ideas that are the foundation of understanding distance education or self-directed learning. How do we describe a self-directed learner? What are the meaningful assumptions that the educator should make about this learner? How and why are these learners motivated? And how does learners’ life stage affect their readiness to be effective distance learners? These and other similar questions will be the foundation on which this chapter will be built for discussing the learner in distance education.

Setting the Stage

Let’s begin by looking at three different learners.

Jim Johnson, a middle-management employee of an accounting firm, finds himself at a dead-end in his job. To climb the “ladder of success,” Jim decides to earn an MBA. His travel schedule prevents him from enrolling in a regular on-campus program of study. On his many flights across country, he reads about “MBA degrees at a distance” and decides to enroll in one of these programs.

Marcos Garcia is a single parent of two children living in a large metropolitan city. Marcos would like to learn more about his three and five year olds. He has decided to participate in a six-week, not-for-credit, online offering in child development that is being offered by the Cooperative Extension Service.

Samantha Vanderkamp is a retired postal worker. With time on her hands, Sam decides to learn something about her Dutch roots. Sam now has the time to “surf” the worldwide web for sites on Dutch art and history.
In all three of these scenarios an adult is about to embark on a period of learning. Two of the learners will be participating in organized educational programs – one formal and the other nonformal. The third learner has chosen to learn in a non-structured manner. All three will be required to be self-directed as they go about their learning projects. In all three cases, electronic technology will be a major part of the learning experience, that is, using a computer in some form. All three are embarking on a form of distance education. All three are typical adult learners.

**The Assumptions the Distance Educator Holds About the Learner**

Malcolm Knowles (1970, 1980), building on the foundational ideas of Eduard Lindeman (1926), has done a tremendous service to distance educators by focusing attention on the assumptions that educators hold about their learners, that is, the feelings and biases that we have when we consider the people who are trying to learn from us. Knowles (1984) would suggest that our assumptions about our learners – our understanding of who and what they are – define our potential for being successful in helping them learn. The teaching methods and techniques we use as distance educators are merely reflections of the assumptions that we hold about our learners. We can make frequent changes in our teaching methods, but unless we set about to change the assumptions we have about our learners, we will probably see little difference in our effectiveness as educators!

Knowles (1984) uses the term “andragogy” as a keystone to the understanding of adult learners, the assumptions we hold about them, and how we relate to them. The term “andragogy,” originally used in Western Europe, was brought into adult education literature in the United States by Lindeman (1926) and later popularized by Knowles (1970, 1980). The term draws its meaning from a set of comparisons between andragogy and the more familiar word that it is compared with – “pedagogy.” As Knowles (1970, 1980) points out, pedagogy is drawn from the Latin that means “to lead children.” He felt that using a term such as “pedagogy” to define interactions with an adult learner was rather inconsistent and inappropriate. He felt there needed to be a term that better defined the adult as a learner and how we interact most effectively with such a learner. He consequently worked to define operationally the concept of andragogy, to clearly differentiate between it and pedagogy, and to popularize the term as a meaningful way to describe a set of assumptions best held by an adult educator – assumptions that respected the learner as someone who was approaching the challenge of learning in a self-directing manner.

Knowles (1970, 1980) began by providing simplistic definitions of the two terms. He defined pedagogy as “the art and science of teaching children.” Carefully selecting his words, he then went on to define andragogy as “the art and science of helping adults learn.” He was careful not to refer to andragogy as “teaching adults” since he was concerned that the role of the educator be that of a “helper” rather than someone in control who merely wanted to “teach.” Being a helper created a very different view of an adult educator and one that was significantly more difficult to operationalize than an educator who has set about the business of “delivering” education to learners. An educator of adults, according to Knowles (1984), would not be able to fulfill his or her educator functions without developing a strong relationship with the learner. The role of the adult educator was dependent upon this learner-educator relationship, which was a significant departure from earlier practice. Knowles (1970, 1980), in defining the concept of andragogy, drew heavily on a humanistic rather than a behavioristic view of the learner. It was to become an important differentiation between the two terms and reinforced the concept of self-directed learning as a major differentiation between the way in which an adult approaches learning as compared to how a child approaches learning.
The Assumptions of Andragogy

To provide clarification of how significant the differences are between one who practices andragogy and one who practices pedagogy, Knowles (1984) defined a set of assumptions about learners that should most appropriately be held by the adult educator or the “andragog.” This same set of assumptions holds significant promise as the assumptions that should be held about learners in a distance education environment.

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<td>Knowles’ Andragogical Assumptions</td>
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1. Adults are motivated to learn as they experience needs and interests that learning will satisfy.
2. Adults’ orientation to learning is life-centered.
3. Experience is the richest resource for adults’ learning.
4. Adults have a deep need to be self-directing.
5. Individual differences among people increase with age.


As we examine these four basic assumptions about the adult as a learner, a number of understandings gain further clarity. For instance, as the needs and interests of the adults become understood and clarified by the educator, their motivation for learning becomes stronger and they are more likely to invest the needed time and resources for a successful learning experience. Such a readiness to learn is often referred to as a “teachable moment” and forms the basis for very significant learning events. Learning that is based on the needs of the learner is often self-motivated and internally directed and is most easily seen in out-of-school settings such as conferences, community forums, web browsing, or independent reading. The large number of self-improvement books found in local bookstores often attempt to respond to adults’ motivation to learn that is based on their experiences and interests.

Focusing learning on life that we are encountering, not life as it may appear in a year or two, seems to be such an obvious link as we reflect on our own day-to-day lives. Yet, as educators, we often forget this as we are trying to help others learn. The challenge of helping others learn is most typically organized around a set of views and recommendations that are brought by the educator and imposed on the learner. The more powerful approach is one whereby the concerns that form the basis for learning are drawn from the very problems that are being faced by the learner. The astute distance educator builds the curriculum in such a way to allow a problem-centered focus that is able to respond with a sense of immediacy to the real problems being faced by the learner.
This idea is built on the premise that the learner does, in fact, have significant experience that can form the basis for further learning. Knowles (1984) reminds us that the adult learner does not come to the classroom as a blank book. Instead, the learner brings a richness of experience that can and should be used by the educator as the basis for further learning. Of course, to take full advantage of the adult’s experiences as the basis for learning also suggests that the learner must be empowered to be self-directing as he or she goes about the learning. To establish learning agendas that are dependent upon the educator as a middle person who is needed for learning to occur is counter to the principles of andragogy. The adult can best bring his or her own experiences forward as the basis for learning when the adult feels that he or she has the power to be self-directing in his or her own learning activities.

Knowles (1984) does not suggest, however, that the adult or self-directing learner always appears, as if by magic, at the doorstep of the educator with all of these characteristics or assumptions fully functioning. No, that would certainly be a bit too idealistic. What Knowles (1984) does suggest, though, is that it is possible for the educator to hold these assumptions as strong beliefs, to use them as the basis for creating a safe and powerful instructional environment in which the learner is able to accept them as appropriate behaviors, and then to help the learner in a variety of ways to demonstrate and adopt these behaviors. Within the distance education setting these assumptions help establish the foundation on which specific instructional strategies and delivery technologies should be selected and implemented.

Considering the cases presented at the beginning of this chapter, it is easy to make assumptions about all three of the learners that are consistent with Knowles’ view. We can view Jim Johnson, with his desire to earn an MBA to help him move ahead in his job, as someone who is ready to learn, has a strong need to know, and is ready and willing to display that need. Marcos Garcia’s desire to learn child development, on the other hand, can be assumed to be clearly problem focused with Marcos having a significant experiential base that can be built upon for further learning. And it is easy to see Samantha Vanderkamp as someone who is clearly self-motivated and inner-directed in her desire to surf the worldwide web as she goes about learning about her Dutch roots.

Motivation for Learning

Adult motivation to learn is often considered in light of two categories:

**Learning for instrumental motives** – where learning activities are clearly engaged in based upon what specific outcomes (skills, knowledge, abilities) will accrue to the learner. The learning of new job skills fits in this category.

**Learning for intrinsic motives** – where learning is not nearly as utilitarian and is engaged in for a host of reasons that appeal to the inner motivations of the learner. Learning how to play a musical instrument, surfing the worldwide web for information on a hobby, or asking a neighbor to explain how to fix one’s lawn mower are examples of intrinsic-focused learning.

This simplistic set of two categories of motivators for learning is drawn from the early research of Cyril Houle (1961). Houle (1961) conducted a study of adults attending a formal adult education program. Based upon the adult’s motivation to participate in a formal adult learning program,
Houle was able to identify three distinctly different types of learners.

**Goal-oriented learners** – where the learners are motivated by the accomplishment of a particular end. Their motives were clearly instrumental in nature. They wanted to learn skills that could be transferred to specific areas of their lives (e.g., work, family, community).

**Activity-oriented learners** - where the learners are motivated by their social and interactive needs. Investment of time in a learning activity would be deemed successful by the learner if ample and meaningful opportunities to interact with other learners were available.

**Learning-oriented learners** – where the learners are motivated by the excitement and joy that comes from the act of studying and learning. The content of the learning activity, though important, is secondary to the very act of learning itself.

Within Houle’s (1961) framework, the challenge for the distance educator becomes very clear. Understanding the reasons why a learner has chosen to participate in a particular distance education program can help define the manner in which the program is promoted, designed, implemented, and evaluated. For instance, clarifying specific skills that will be learned through the distance education program is essential information for the goal-oriented learner – one who is learning for instrumental motives. However, such a specification of skills to be learned may be of little help to the activity-oriented learner who is trying to make the decision about whether to participate in the program based upon the type and depth of learner interaction that will be available. In fact, distance education programs are often avoided by activity-oriented learners, those who are trying to learn for a specific set of intrinsic reasons, since it may be assumed that most of the learning time will be spent in isolated and non-interactive ways.

Returning to the three cases presented earlier, it would seem that Jim Johnson’s pursuit of the MBA is clearly guided by a goal orientation. He wants to develop specific skills that will allow him to move on in his job. Similarly, Marcos Garcia’s need as a single parent is also guided by a goal orientation with his desire to learn more about his children. However, it can also be assumed that for Marcos another important avenue for his learning, as a part of the online program, is the opportunity to interact and share information with other parents facing similar concerns. This goal would be seen as characteristic of an activity-oriented learner and would help Marcos better understand that he is not alone in facing the problems of raising his two children. And finally, Samantha Vanderkamp, with lots of time available for her to surf the worldwide web, would appear to be most like a learning-oriented learner. She is most apt to take many “side trips” of discovery as she moves ahead with her learning agenda.

A more recent addition to Houle’s (1961) trilogy of adult motivations to learn is that of emancipatory learning (Freire, 1973; Horton, 1990; Mezirow, 1991). The learner who is motivated to pursue emancipatory learning will have some of the same social-interaction needs that are seen in the activity-oriented learner. However, the key motivation will be the opportunity to learn, especially about self, through significant reflective opportunities. Emancipatory-oriented learners are more likely to participate in face-to-face learning situations where immediate feedback is available, ideas can be challenged and built upon, and new courses of action can be planned. Those forms of distance education that can support emancipatory learning are typically synchronous forms that minimize the technological interface and promote as much person-to-person interaction as possible.
The Relationship of Adult Development to an Understanding of the Adult Learner

Although the old adage, “You can’t teach an old dog new tricks,” would have us believe that as an adult moves through life his or her readiness, willingness, and ability to learn becomes less and less flexible, it really is not so. And, the easiest way to understand this view of continuing lifelong learning for the adult is to understand the basic concepts and ideas behind adult growth and development. A number of adult developmentalists (Erikson, 1950, Neugarten, 1968, Gould, 1978, Atchley, 1983, Sheehy, 1995) have documented the variety of stages and phases through which adults proceed as they progress through life. Though each developmentalist tends to take a somewhat different perspective on how the stages and phases are described, he or she does share certain notions, ideas, or concepts in common. They can be summarized as follows:

Adult development, the way we progress through our life, is **definable and made up of certain predictable events** that provide markers along our path of life. Labels such as “mid-life crisis,” “generativity,” “settling down,” “re-evaluation,” and “middle age” are some of the many words chosen to describe these markers.

The concept of adult development implies a **positive or a forward movement**. Adult development doesn’t move backwards. At worst an adult may fail to develop and maintain a static position, but he or she will never move backward. In much the same way that we don’t unlearn how to walk, the adult does not unlearn the growth that has been achieved.

As we progress through life there is not only a difference in how a particular event is labeled but there is also a **qualitative difference** in the event itself. Each successive event in life is dependent in some measure on a preceding event and, as such, each successive event, as it builds on earlier events, becomes more and more complex – in the same way that life itself becomes more and more complex.

As we move forward in our development our **ability to reflect back on earlier stages or phases is improved**. Through such reflection it is possible to meet later stages of life with a keener awareness of how to be successful in our own development.

Now with all of that as prologue, exactly how does an understanding of adult development assist the distance educator in better knowing the learner? And, of course, how can such a developmental understanding of the learner be translated by the distance educator into the more effective design and implementation of a distance education program.

The obvious first answer is that a developmental perspective of the adult learner helps to define the subject matter or area of focus for the learner. The younger adult learner, in such a view, would be more interested in degree-completion activities, whereas the thirty-year-old learner might be interested in learning that helps provide a sense of job security that would insure the safety of a young family, and the mid-age learner would be more interested in learning that assists in gaining work-related promotions that could help fulfill a sense of personal accomplishment and worth.

However, it is important that adult learners be cautious in their assumptions here, as adult
development also teaches us that as learners mature they become more and more complex, and our ability to simplistically define them in terms of subject-matter interests becomes less and less viable. It would seem most appropriate, therefore, for the distance educator only to begin with an initial view of the content the learner’s developmental stage suggests, but then to be willing to alter that view based upon further understanding of the learner, his or her complexity, and the actual involvement of the learner in the modifying of the instruction based upon his or her developmental needs.

When adult development is viewed as successive periods of transition and stability, another insight for the distance educator becomes apparent. *A prime time for learning is during periods of transition rather than periods of stability.* This is due in large part because it is at transition times in life that the adult is more apt to turn to learning as a way to assist in the resolution of the instability of the transition. After all, learning is traditionally defined as “change in behavior” (Gagne and Driscoll, 1988). Stable times in life tend to be those times when everything seems to be working well, change isn’t needed, and our learning agenda becomes rather minimal. Assuming that the learners involved in a distance education program are in a transitional period of their lives suggests the need for a variety of program supports that can assist the learner in effectively dealing with change. The distance education program must be ready to make needed adjustments and changes based upon the transitions being dealt with by the learners. This idea, programmatic change based upon the transitional needs of the learner, is very contrary to the popular view of distance education that assumes that successive uses of a program are easy since the program has been “field tested” and can now be run over and over again with minimal change. A “canned” distance education program, one that is merely played over and over again for different sets of learners, risks failure because of its inability to effectively accommodate the changes that the learners may be encountering.

Although the perspective of the learner has the potential to improve with each successive developmental stage, the learner does not necessarily have the inherent ability to make effective use of such a perspective during a transition. Therefore another very valuable role for the distance educator is to assist the learner in reflecting on the changes that he or she is encountering so the learner can successfully deal with the change and transition that is being experienced.

Using a developmental view of the adult learner encourages the distance educator to provide the technology and teaching strategies that allow for personal reflection, to allow the flexibility that provides opportunities for defining and redefining specific content foci, and to create opportunities for learners to gain insight from others who are experiencing or have experienced similar development-initiated agendas. Regardless of whether an asynchronous or synchronous teaching and learning environment is being used, the technological aspects of distance education must be carefully examined to assure that they are not repressing or overpowering those aspects of adult development that are the basis for defining one’s own learning agenda.

A final concern that an understanding of adult development helps to bring into focus is the reality that the lives of learners and teachers can be very similar. Both learners and teachers can be experiencing a transitional period in their lives, can hold insight for each other, have a need for flexibility, and can make qualitative changes in their perspectives, even while the distance education program is underway. Such a thought serves to “even the playing field” and brings both teacher and learner to a position of mutual respect for what each has to offer. Gone is the more traditional view that the teacher is empowered to be the deliverer of knowledge and the learner is only empowered to be the receiver of such knowledge.
Thinking back to our three hypothetical cases, Jim Johnson might be at what Daniel Levinson (1978) refers to as a “mid-life crisis” or Gail Sheehy (1995) a “second adulthood” whereby his pursuing of an MBA will help him resolve a potential crisis of purpose and propel him on the “ladder of success.” Hopefully the involvement in an MBA program at a distance will help to bring a new sense of quality to the life he is leading.

Meanwhile Marco Garcia appears to be at an earlier developmental stage, one that Erik Erikson (1950) refers to as Young Adulthood, where the key developmental focus is on establishing a sense of intimacy through a relationship of love. In Marco’s case the loving relationship may be the one between his children and him. He would hope that the six-week online offering will help build and strengthen the relationship that he has established with his children.

Samantha Vanderkamp, when viewed as an adult going through a developmental transition period, finally has the needed time to pursue a learning agenda previously out of reach because of the other demands of her life. Developing a sense of historical relationship by learning about one’s ancestors creates a strong qualitative approach to life in retirement. Samantha is clearly at a time where she is in charge of her learning agenda and not about to yield it for unneeded structure. The help that Samantha might best benefit from is what Allen Tough (1979) describes as an essential role of the educator of adults – helping the learner become a more effective and efficient planner of their own learning projects.

Conclusion

The task of designing and providing a meaningful distance education program for a group of self-directed learners may sound exceedingly daunting. After all, it demands that we not only think through the content of what will be delivered in the program but also be able to accommodate an andragogical set of assumptions about the learner, be sensitive to the learner’s motivation and whether his or her participation is based upon instrumental or intrinsic motives, and to be able to respond to the developmental stage and corresponding needs that the learner may be experiencing. Not an easy challenge in a face-to-face learning situation and an even more difficult challenge in distance education. However, it is through the meeting of these challenges in distance education that the potential for a meaningful learning opportunity is achieved.

References


