

Self-directed informal learning: A case study

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This case study examines the life journey of a self-directed adult learner who has made remarkable achievements in overcoming a difficult educational beginning in early childhood, as well as personal trauma in adulthood. The subject has shown determination in seeking out his own opportunities to learn in spite of major drawbacks, chief of which was a vehicle accident in which he acquired both physical and brain injury. The paper compares accepted adult educational models and theories with the learning styles of this person, and concludes that he has used informal learning to his advantage in a manner in which institutional education would have failed for him. The discussion of the learner's choice of educational methods demonstrates the way he has progressed from a position as a farmer with low literacy skills to that of a successful businessman through his own determination.

Informal learning is becoming a focus of attention as adult educators acknowledge the increasing number of adults who have created their own education and made a significant impact on their world without a formal educative base beyond secondary school. In most cases, these people have been restricted in their access to formal adult education because of the limitations of personal circumstances or a lack of awareness of their need in early adult years.

Two recent articles in this journal explored ideas about learning outside the normal context of formal, institutional, adult learning. Branagan and Boughton (2003) discussed the value of social movements as 'major learning sites worthy of serious study', an area examined at length by Foley (1999). Brennan (2003), in his journal article, presented research on the concept of models and mentors, sometimes as an adjunct to formal education, but also as a part of informal learning. This case also directly relates to this year's main research activity in the Adult Learning Australia association – that of the connections between adult learning and health, as reported in *The Current*, e-news from ALA (Beddie 2004).

Successful examples of self-directed learners have long been referred to in the community as 'self-made men' (in this context, women were in the past rarely, if ever, regarded as being 'self-made'!). The following case study exemplifies the achievements which are possible for a person who is resolutely committed to lifelong improvement and attainment of personal goals. As will be shown in the article, in the case of this individual, personal circumstances and a poor beginning at school discouraged formal adult education.

Harry Hoyer, a family friend who is hopeful that the publication of his story might encourage others to understand the value of self-directed education, is a sixty-three year old, single man who exhibits the characteristics of a self-directed learner in a notable way. There have been a number of significant events and transitional stages throughout his adult life which have led to episodes of learning.

Through this learning, ultimately transformational, he has overcome drawbacks and major trauma to achieve success in his working life and, subsequently, independence in business.

Brookfield (1986) has summarised principles of adult learning he has derived from various studies, principles which I have used to examine the pattern of this man's learning, and to demonstrate that many of the conclusions drawn from these studies can be verified in the case study I have undertaken. Brookfield's summary states:

Adults learn throughout their lives, with the negotiations of the transitional stages in the life-span being the immediate causes and motives for much of this learning. They exhibit diverse learning styles – strategies for coding information, cognitive procedures, mental sets – and learn in different ways, at different times, for different purposes. As a rule, however, they like their learning activities to be problem centred and to be meaningful to their life situation, and they want the learning outcomes to have some immediacy of application. The past experiences of adults affect their current learning, sometimes serving as an enhancement, sometimes as a hindrance. Effective learning is also linked to the adult's subscription to a self-concept of himself or herself as a learner. Finally, adults exhibit a tendency toward self-directedness in their learning (p.31).

Harry's learning, undertaken almost never in formal situations but in response to life transitions and with outcomes which had immediacy of application to his needs, has served him well. He has used various strategies in his learning to overcome difficulties and describes himself as a lifelong learner, and life as 'a process of learning'. A chronological account serves best to demonstrate the way Harry has built on experience and transitional changes to further his learning.

Harry's parents were dairy farmers who did not progress beyond primary school, although his paternal grandfather was a successful businessman, possibly with achievement in an academic field,

who was sent to Australia to establish a banking institution. The grandfather does not appear to have influenced Harry's education, however, and Harry still feels disadvantaged by his poor start in primary school, late at six years old, where all six grades were in one room until he reached third grade. Consequently, he did not receive the initial attention he needed, resulting in what he sees as a failure to become fully literate and a continuing sense of not having had proper early learning. He now believes that he would have gone on to higher education had he not suffered that foundational lack. Nevertheless, Harry does not retain particularly negative feelings towards school because as an only child it was 'where the other kids were'.

Secondary school memories are of 'an adventure' with new motivations as the world opened up and the process of separation from parents began. Sadly, difficult circumstances again intervened through a teacher Harry describes as a 'bully', so that he felt compelled to leave school before gaining his Intermediate Certificate. It then automatically followed in the expectations of the times that he would take up full-time work on his parents' dairy farm.

Although Harry tends to deprecate himself in his discussion of what he perceives to be his poor literacy skills, he began his self-directed learning early in his youth. His first attempt was a correspondence course on farm machinery from Auburn Technical College, which he did not finish because he 'couldn't handle the study' – his reading and writing were insufficient to cope. He describes himself as a 'physical learner, not mental', who found difficulty in comprehending examination questions – one reason for leaving school prematurely.

From this point on in Harry's life, a statement made by Tennant and Pogson (1995: 67) is exemplified: 'it is now recognised that experience plays a key role in adult intellectual development, and especially in the development of expertise'. Throughout Harry's adult life and through all his various learning projects, his experience has brought about 'fundamental changes in [his] perspective' (Merriam & Brockett

1997: 143). Moreover, it is clear that the context of Harry's 'life-world' has shaped the pattern of his informal and self-directed adult learning (Tobias 1998).

While continuing to help his parents work the farm, Harry took odd jobs brought about through his natural mechanical aptitude and, probably, information he had retained from the incomplete correspondence course. In 1964, he left the farm and began to work as a motor mechanic full-time, although without taking up an apprenticeship. By 1965, he had started his own business rust-proofing cars, learning the skill as he went from an older man he employed in the business, who taught Harry 'all he knew'. This was to set the pattern of his learning as informal, as Caffarella (1993) has noted of many adults:

Researchers, primarily replicating Tough's original study of learning projects, have verified that a significant number of adults learn a great deal outside of the control and confines of formal educational institutions (p.27).

Circumstances from this point on meant that Harry would have to be self-directed in his learning in order to survive and retain the independence and dignity he values. A year after beginning his business, in April 1966, a serious car accident in which Harry was driving, but not at fault, left him in hospital for almost six months. This event brought change from which he has never fully recovered, but which has led to much of his learning. Aslanian and Bricknell concluded in a 1980 survey that 'most adult learning efforts are undertaken in response to a life transition' (cited in Merriam & Brockett 1997: 143).

Harry suffered injuries in the accident which have resulted in long-term difficulties with his health, a speech defect and problems with his memory, as well as emotional trauma. He states that, following the accident, he had to re-learn 'virtually everything', largely because of the brain injury he suffered. To make matters worse, his father

had died, leaving Harry's mother to cope virtually alone. As well, the rented property in which the rust-proofing business was situated was demolished, despite the employee who taught him his skill having carried on alone during Harry's hospitalisation, so a new start had to be made.

An examination of Taylor's Learning Cycle model, one which involves four phases of learning and four transitions, yields an interesting comparison with Harry's experience following his accident (cited in Mackeracher 1996: 190). The 'disorientation phase' brought about by the accident and resultant disability led to the exploration phase and reorientation through accepting a doctor's solution of work as rehabilitation, at first on the farm. Although recovery was slow in that Harry's first outside employment was unskilled work sweeping factory floors, mowing lawns and cleaning toilets, he feels that 'dealing with the general public' was excellent rehabilitation for him. He then progressed to the point which Taylor refers as 'equilibrium' by taking a course and graduating successfully as a forklift driver, which he believed instilled in him a 'tradesman's attitude'. He was able to reassert his mechanical skills and changed jobs to a position as a motor mechanic once more, continuing with 'on-the-job-training'. After eight years with this company, Harry's skills had progressed to the point where he was deemed a tradesman, despite having not undertaken an apprenticeship or any formal education, and he was awarded certification as a motor mechanic.

Mackeracker's (1996) discussion of learning styles indicates that Harry learns by 'active experimentation'. During the time of recovery, and the many learning situations since, he has used information gained from previous experiences to apply to the current learning situation. According to McCarthy's variation of Kolb's Learning Style Model, he is a convergent learner who learns from 'hands-on activities, mobility and skill-oriented evaluation'. The appropriateness of selecting this model as Harry's learning style, which includes a

dislike of written assignments, is borne out by his disappointing early school experiences and his inability to complete the correspondence course in the field in which he is clearly gifted (Makeracker 1996).

A further change in employment for Harry, including his acceptance 'as a tradesman from day one', led to his seeking more learning and formal certification after contact with registration mechanics from the Department of Motor Transport. Harry coveted the qualification for approval to pass vehicles for registration and asked how he could achieve this end. He relates how the mechanics took him to their boss, who loaned him the necessary textbooks, which he studied and subsequently passed the examination required to gain the qualification. Despite his claim to be inadequate in his literacy, as well as the hindrance of disabilities acquired in the accident, he achieved the same qualifications as the departmental inspectors. While working for the same firm, he also acquired a coach driving licence.

When the business changed hands, Harry acceded to the new owner's suggestion that he become a general handyman in the chain of garages and workshops, while still approving registrations. Harry was happy with this, as he says it allowed him more freedom and used the wide-ranging skills he had gained in his farming experience. By this time, his mother was elderly and could no longer manage the 130-acre farm, so he eventually left employment and spent the next six years running the farm full-time and caring for his mother until she died. Meanwhile, he did a few outside jobs and fattened a succession of herds, each of around forty beef cattle, for sale. Then, after his mother's death, Harry's health again forced a life change after he suffered a heart attack while employed as a heavy machine operator.

Merriam and Caffarella (1999: 295) discuss a number of models in self-directed learning, including those they term 'interactive'. These models comprise sets of learning opportunities, rather than a linear progression of learning, and together describe the way Harry has created, adapted or grasped existing opportunities to learn depending

on his circumstances. His way of utilising situations to his advantage is exemplified in their presentation of Spear's model and of Brockett and Hiemstra's Personal Responsibility Orientation model, where 'individuals assum[e] ownership for their own thoughts and actions' based on humanist ideas (Merriam & Caffarella 1999: 295–8). One definition of humanism, though referring to the Renaissance, seems singularly appropriate in discussion of this learner, that '[h]umanism was an affirmation of the freedom, power, uniqueness and individuality of human beings' (Thompson 1996: 18).

Now restricted by further physical limitations, Harry displayed his adaptability by moving into a completely different sphere of activity when he went into partnership with a retailer who operated a bargain store. Brookfield notes the randomness of heuristic learners and the way significant events suggest new learning paths (1986: 45), and in Harry's case this venture, although initially almost a disaster, has led to remarkable success and new directions in his education. He has followed a path suited to his needs, and one which may not have succeeded in a formal learning situation.

Harry's partnership in the retailing venture proved to be unfortunate and resulted in financial loss to himself and others, although he expresses how much he has learned in the process, even utilising the skills of a difficult colleague. In the end he was able to take action to gain sole control of the business and develop it in the way he desired.

As in all of his other learning episodes, Harry has grasped opportunities to learn from any available source. Dissatisfied with the 'downmarket' aspect of the retailing style, he has, through learning such things as customer preferences and demand from women he employed to manage the store and to buy stock, raised its level from bargain outlet to quality gift boutique. At the same time, he has gained computer knowledge from a TAFE teacher he met and has done what he terms a 'backyard course' from another TAFE teacher who teaches retailing procedures. He has learned by experience to

handle sales representatives and staff, and now feels confident to deal with customers, whether difficult or not.

Through his latest venture, undertaken concurrently, Harry feels he is repaying society for all the support he had after his accident and during his rehabilitation, as well as helping to prevent similar occurrences in the future. Inspired by an advanced driving course he took after his accident, Harry has launched a nationwide competition, Drive Well Australia (2003), in which drivers with a clean driving record for twelve months become eligible to enter a draw to win a Holden car. He describes it as 'a modified scheme to save lives' through his desire to improve driving habits on Australian roads. In this he has the support of the car manufacturer, the Roads and Transport Authority and other government agencies as well as the police force, and has been featured on national television.

This latest episode of learning has been the most transformative in Harry's life. Mention of Mezirow's Transformation Theory and of Freire's 'conscientization' process in his Emancipatory Philosophy is useful here. These theories define the way Harry has shaped his life through learning following his accident and subsequent significant events (Merriam & Caffarella 1999: 318–339). Mezirow's steps in this process of transformative learning closely resemble Taylor's (1996), and the 'perspective transformation' following the exploring of options step is clear in Harry's learning outcomes. While Taylor claims that Mezirow's theory is 'too egocentric' where social action is a consequence, it is nonetheless true in the way Harry's Drive Well Australia venture has led to 'alliances with others of like mind (manufacturers, RTA and the police) to implement social change – by rewarding better driving (Merriam & Caffarella 1999: 323).

Harry reflects Freire's Emancipatory Philosophy in his response to his accident, especially through Drive Well Australia, where he has achieved the 'ultimate goal [of] liberation, or praxis, "the action and reflection of men [sic] upon their world in order to transform

it"' (Merriam & Caffarella 1999: 324). As Merriam and Caffarella further state in reference to Freire's work, Harry has become 'an active agent in constructing a different, more just reality' (or attempting to) through 'critical consciousness' and his exploration of the meaning of those life events that have shaped his world and his learning. Indeed, his claim that he might have become 'academic', had he received adequate early learning, is borne out by the extent of his critical thinking. Mezirow's theory as 'rational' (Merriam & Caffarella 1999: 335) thus fits Harry, in that he does not refer to goals, dreams or fantasies in recounting his learning journey. His development is an outcome of his experience and his continual efforts in self-directed learning, and as such is intrinsically practical.

Harry has almost invariably used an informal way of utilising the teaching of people skilled in his desired area of learning rather than formal instruction, although he has undertaken formal courses occasionally when necessary. Thus, his learning purpose has varied at different life stages to accommodate to his needs at the time, but always for the reason that he has understood himself as a learner. As Brookfield states, the 'transitional stages in [his] lifespan' have been the immediate cause and motive for virtually all of his learning. It is also very obvious from this account that Harry's learning activities have been meaningful to his life situation and their outcomes have always had immediacy of application – even the coach driving licence enabled him to transport fellow employees at that workplace. The experience of the accident and resultant injuries might be seen as only a hindrance, but Harry also sees it as a catalyst to much of his learning. Thus, the outcome of what could have been a disastrous health situation has instead led to successful self-directed learning.

It seems clear to me that Harry's learning could not have been transformational in a formal course situation. Indeed, much of his learning has been in areas which could not be gained in an institutional context. The way he has undertaken his self-directed

learning in stages, at his own pace and in response to his own immediate needs, has allowed him to develop and transform personally from a solitary farmer unskilled in communication to a confident businessman able to operate in the public arena.

With the recent sale of his farm and purchase of a home for himself, Harry has successfully completed the change in the course of his life into an entirely different arena. His greatest joy has been the recognition of his achievements by his nomination to the 2004 'Australian of the Year', in which he reached a position as a finalist. This is indeed a fitting accolade for a self-directed learner who has exhibited such determination to overcome trauma and misfortune and achieve education through his own efforts.

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