

Chapter 22. How to Design and Conduct Self Directed Learning Experiences

Introduction

By Roger Harrison

As personal development experiences my Autonomy Labs were a "critical success," in that almost everyone liked the experience and learned a lot. They appealed to the sorts of people who went to T groups and encounter groups, and I believe that in Europe the Autonomy Lab worked much better than these US imports. The labs were a "hard sell," though, partly because training managers in large bureaucratic companies were reluctant to send people off to something that offered to return them to work as autonomous, risk taking initiators of action! Had these laboratories been invented ten years later, they would probably have been more welcome. It was also difficult to specify the outcomes, dependent as they were on choices made by the participants during the program itself.

During the two or three years I worked with the Autonomy Lab, my colleagues and I designed and conducted programs based on autonomous learning for managers and professionals in ten countries in Europe, Africa, and North America. The methods were modified and extended by educators who attended those programs and went on to run their own. I like to think that I had some modest influence in beginning the vigorous tradition of self managed management development which has grown up in the UK during the last twenty odd years.

Following my work with the Autonomy Lab, I was convinced that self directed learning would empower participants in learning focused content, just as it had empowered their personal expansion in its original free form process. I experimented

successfully with a variety of applications of self directed learning, all of which were content focused, including programs for training consultants and managers in the management of change which I designed and conducted with Fritz Steele (USA) and Ian Mangham (UK). In the early seventies I collaborated with David Berlew to develop The Positive Power & Influence Program, a program designed to increase the flexibility and effectiveness of participants' interpersonal influence behavior. I spent a decade deeply involved in the design and commercialization of the Positive Power & Influence Program. The program, now solely owned by Situation Systems Inc. of Hanover, Massachusetts, has been very successful and surprisingly durable. Hundreds of training professionals have become qualified to conduct it, and thousands of participants have participated in the program and in its successor, The Positive Negotiation Program. I am told that both programs continue to attract a steady flow of participants.

This paper was written to bring together in one place the learning that I and my colleagues garnered about self directed learning from our experiences with the Autonomy Labs, from our work in training people for change management roles, and from the application of self directed learning in the Positive Power & Influence Program. I have rewritten parts of it to minimize overlap with the preceding paper, "Developing Autonomy, Initiative and Risk Taking through a Laboratory Design."

The Design of the Positive Power & Influence Program

We built the Positive Power & Influence Program around a tight model of interpersonal influence styles and skills. Our idea was to begin the program with

conventional control by the trainers, and then progressively give more and more choice to participants as they became familiar with the model and were ready to assume responsibility for their own learning. I have described my experiences with the design and commercialization of the program in some detail in Chapter 5 of *Consultant's Journey* (Harrison, 1995).

Diagnosis and Learning the Model

Before coming to the program, participants filled out an Influencing Styles Questionnaire, and also obtained completed questionnaires from four or five colleagues of their choice. Thus they began the program with data for comparing their self perceptions of their influence styles and skills with the perceptions of others who knew them. We spent the first day of five in highly structured exercises for learning the model and for diagnosing one's strengths and weaknesses in using the four basic influence styles, using video recording and playback, with detailed observation and recording of the influence behaviors actually used by each participant. Participants thus went away from that first day with coherent and, for the most part, consistent information on which styles and behaviors they used, and which they avoided.

Exploring Alternative Influence Styles and Behaviors

On the second day we gave participants choice among several "tracks" for exploring and experiencing styles and skills which they normally underused or avoided. Within each of the tracks, participants chose from a cafeteria of short structured role plays. The instructions for these role play specified that they were to be carried out using only the behaviors from one of the four influence styles in the model.

Thus, each track provided a 'total immersion' experience of one style. Our intent was not for participants to acquire skill in using the style, but to give a thorough exposure to its "look and feel."

Self Directed Learning

On the third and fourth days, we moved fully into self directed learning. We told participants, "Now you have learned the model, and you have discovered which of the styles and skills you use well, and which you avoid using. During the "tracks" you have explored some styles and behaviors you normally do not use. Now you are ready to make informed choices about your learning goals and to choose your own paths to those goals. You may choose to develop skills in influencing styles you have formerly avoided. You may choose to perfect your use of styles in which you already have quite a lot of skill. The choice is yours."

At that point we provided participants with an annotated catalogue of learning exercises and activities, and we offered our services to help people choose those activities that would best achieve their learning goals. For two days they were on their own to manage their own learning, except for mandatory small group review sessions with a staff member once each day.

Situation Replays

On the fifth day, we once more provided a tighter structure, as participants prepared to apply their learnings in their work situations. Prior to attending, participants were asked to describe an unresolved influence situation in which they were currently involved, and bring it with them to the program. During the last day we

had them work in triads to diagnose their influence situations, plan how to resolve them, and practice using appropriate influence styles to reach their personal goals. Participants coached each other as they recorded role plays of their individual application situations, and then did them over again, until they were satisfied they would be able to carry out their plans under the pressure of the real life situation.

Experiences with Self Directed Learning

The Positive Power & Influence Program is only one of the forms in which we have embedded the basic self directed learning design template. We have created designs for training trainers in using experiential learning methods; programs in consulting and the management of change; programs for developing entrepreneurial skills and attitudes for engineering and scientific staff; a program for "managing your boss"; and training in the skills of "long-cycle selling". These have been based on the original "design template":

- A clearly articulated conceptual framework.
- Initial self diagnosis, preferably involving participant collection of data from associates and colleagues.
- Structured experiences in which participants assess their skills and knowledge.
- Some experiential exposure to a wider range of behaviors and situations.
- A self directed skills and knowledge building section, using both experiential and more traditional training materials.
- Structured application planning.

Our experience with these programs supports the following generalizations:

- The format lends itself to a wide variety of program contents.
- The programs develop extremely high participant motivation, involvement, and satisfaction.
- Self directed learning designs successfully accommodate a wider range of individual differences in level of preparation, readiness for personal risk taking, and learning pace than any other approach we know.
- The programs deal with deeply personal attitude and value issues with less participant stress than do group based approaches.
- Participants report more concrete and specific examples of work-related application following self directed learning than they do when the same material is dealt with by traditional classroom methods or by teaming designs relying on small group experiential processes.

Organizational and Social Needs for Self directed Learning

The need for self directed education grows out of an appreciation of the changing environmental conditions in which organizations exist. Organizational environments are increasingly characterized by instability, complexity, and rapid change.

Bureaucratic and traditional organizations may manage to insulate their members from some of the impact of these turbulent environments, but this is effective only in the short or medium term. The skill obsolescence of managers and technical personnel illustrates the problem. Technical knowledge and specialized skills are unstable; they have a shorter useful life than that of the person who possesses them. But often when a

person's specific job skills become obsolete or redundant, the individual does also because the capacity to learn and adapt seems to be missing or to have atrophied from lack of use. It is becoming a truism among management development specialists that both organizations and their members need to learn at a rapid rate long past the point at which we previously thought of them as reaching a stable and mature state and beginning to decline.

With few exceptions, the education available to people in organizations does not foster the development of this capacity to learn change, and grow. It tends to be "problem centered," providing knowledge, skills, or even attitudes that the educator presumes the learner needs. The "learner-centered" orientation that might foster the inner capacity to develop oneself in response to changing demands, difficulties, and problems thrown up by a turbulent environment is missing in most formal education. (This may be one reason why many competent and experienced managers place a low value on formal management education.)

In a rapidly changing environment, the knowledge and skills that are provided the learner in the problem-centered approach tend to become obsolescent rapidly. Thus, traditional management education can require that continual work be done on the manager, at considerable expenditure of time, money, and effort. This could be avoided if the manager were both capable and motivated to develop him- or herself-to devote inner resources to learning. changing, and growing as he or she is stimulated to do so by changing environmental pressures and demands.

This thinking leads to the idea of self directed learning a teaching/learning process that involves the manager actively in diagnosing personal learning needs, setting development goals, exploring the environment for educational resources, and carrying out learning activities for him- or herself. This educational process can have both a problem or content centered aspect, and a process centered one: as the participant works on whatever problem he or she brings to the learning situation, he or she is also developing the attitudes and skills required for continuous self-development—learning how to learn.

In the many spheres of public and private life, complexity is increasing, structures and relationships change ever more rapidly, and acquired knowledge is ever more evanescent and unstable. The need to become both a continuous learner and a self directed learner presents itself in a multitude of forms to nearly every individual. My thesis is that this need cannot be met by traditional methods of education. Self directed learning has great promise for releasing *and keeping alive* the creativity and capacity for growth and change that become increasingly dormant in many of us as we age.

To understand why I think self directed learning is so much more promising than traditional methods for freeing and empowering the adult learner, it is necessary to examine the learning models or principles on which our learning designs are based.

More Principles of Adult Learning and Educational Design

In my first paper on self directed learning (Harrison, 1972*-a), in which I describe the Autonomy Lab, I articulate three design principles. They are

- The principle of internal motivation: We evoke and build on the learner's own felt needs and interests.
- The principle of multiple learning tracks: We build in opportunities for learners to go their separate ways within the overall program.
- The principle of optimum confrontation: We provide opportunities for learners to choose their own pace, their own level of emotional stress, and their own rhythms of activity and rest. We trust them to make wise choices in these matters.

After some years of experience with self directed learning, I can expand on what I said then.

Understanding the Game of Training Design

Every designer of training has to take into account the internal needs, motives, and values of the learner and the external means employed by others to control and influence his or her behavior during and after the formal learning experience. Most traditional learning methods do not take the learner's internal states into account; and, when they are considered, assumptions are made about the average or modal learner. The needs, motives, and values of the individual learner are scarcely considered. One reason is that the educator has little or no access to such information when important design decisions are being made.

When one is limited to very general knowledge about the people who are to be influenced, the control and influence processes chosen tend to be simplistic. The educator does not know the students personally in advance of the program and often

does not know the students' application situations either. The educator decides, on the basis of his or her own experience, knowledge, or values, what is to be learned, and then constructs a program to coerce, seduce, or persuade the learner into learning those things.

- *The Classroom Game.* Participants are assigned to training activities as part of their jobs. They understand that they are expected to treat the educator as an authority figure and take the student role that they have learned in school or university. They listen politely, do assigned reading, take notes on the content, and so on. Sometimes they are required to pass examinations on the content.
- *The Expert Game.* The educator uses prestige or specialized knowledge to convince the learner of the former's superior understanding of the matters under discussion, and to encourage the learner to depend on the educator's expertise.
- *The Charisma Game.* The educator presents him or herself as a model for the learner to identify with by being charismatic, attractive, or sympathetic. Effective public speakers do this.
- *The Group Process Game.* The educator forms small groups to work on problems or cases. The groups then establish norms of opinion and attitude to which their members conform, at least on the surface. The groups become satisfying to the members, and provide comfortable and supportive milieu for learning. The progress of each individual member is facilitated by the

group's action. To a large degree, the individuals depend on the group to manage their learning.

- *The Interactive Learning Game.* The educator uses structured tasks, games, or simulations designed so that the desired attitudes and behaviors lead to success. The learner goes through these activities a little like a rat through a maze, rewarded by success for making the right moves, punished by failure for wrong decisions. The immediacy of feedback keeps the learner engaged.

Most trainers and educators use some mix of these "games" in order to influence learners to bring their attention and energy to bear on what is to be learned. These processes applied by the educator interact with the internal attitudes, needs, and interests of the learner. If there is a good "fit" between internal and external forces, these reinforce each other and the experience is felt to be successful by learner and educator. At the other extreme, the external and internal forces may be in opposition, leading to a difficult experience. The educator may have to use all his or her power and skill to overcome the learner's tendencies or to rediagnose needs and redirect the learning program to meet the demands of the stronger and more active participants.

Education in this vein becomes a competitive game between educators and students: the stronger, more intelligent, and more attractive educators "win" and the weaker, duller, less appealing ones "lose." But they all win or lose their own game – one for which they make up the rules and the scoring system. In traditional education, a good teacher influences the students to achieve predetermined learning goals. The learner has the choice of playing the teacher's game or reacting against it; there are few

opportunities for the learner to play his or her own game or develop and operate a personal scoring system. The alternative to dependency and compliance is not independence, but rebellion.

When such education is successful, the student comes away intellectually or emotionally changed, but not stronger in the ability to create and manage his or her own learning process. When the learner returns to the work situation, then the changes produced during the educational experience are extremely vulnerable to the environment. If the new learning fits the direction of the immediate external pressures, it tends to be used and retained. If it does not, a new process of coercion, seduction, and persuasion begins to re-educate the learner to give up or at least suppress his or her newly acquired attitudes, opinions, skills, and knowledge. The final outcome of the educator's efforts is determined during this re-entry process, and the educator normally ends up with virtually no control over those events that most determine the ultimate success or failure of the training activities. During the formal training program, tremendous amounts of energy and skill go into control of the temporary learning process, only to be wiped out or undermined by the stronger and more enduring forces of the larger environment.

Most adult educators are aware that much of the time they do not know and cannot significantly control either the needs and motives of the learner or the environmental forces governing application and continued learning. This awareness leads to renewed attempts to win the game through the application of creativity and skill.

Giving Up the Game in the Service of Learning

In self directed learning, *we give up trying to win the game*. We accept that both the learner's own forces and those of the environment are stronger and more enduring than any we control, and we find ways of working selectively with those forces rather than against them. In doing this, we choose to work primarily with the learner's own forces, partly because these are most accessible to us and partly because of our conviction that organizations and the larger society need self directed learners to cope with rapidly changing environmental forces.

Almost everything we do and achieve in designing and conducting self directed learning program's stems from this radical decision to serve the participant's growth toward autonomy and responsibility as a learner. I shall describe a number of ways in which we operate to facilitate the individual's identification of his or her own learning needs and goals, and provide help and support for "playing one's own game.

We give participants maximum feasible choice at all points. I have described this concept above, and I have shown how Dave Berlew and I designed the Positive Power & Influence Program to give participants maximum feasible choice. Early on in a learning experience, people may be reluctant to make choices, and they may not know enough to make important or complex choices. So we give them easy, simple choices, and work up to the harder ones. Making choices strengthens the learner's ability to choose; so even if it is a matter of choosing one of two nearly identical activities, we give a choice wherever we can.

We balance structure and ambiguity. Because ambiguity and choice produce anxiety and may lead to withdrawal and immobilization on the part of the participant, we carefully work the tension between giving choice and managing stress. Over the life of a program, we reduce our control over the participants' uses of time and space, while providing structure through the learning resources we offer. We provide many structured games, simulations, activities, instruments, and books and articles, and we make available annotated references to all the materials available. As the program evolves, we give less and less direction as to what activities to do and how to do them.

We provide a clearly articulated conceptual framework and relate all the learning activities and resources to it. We reduce anxiety and dependency by providing clear conceptual maps of the "learning territory." Once participants have learned their way around the territory, the map guides them in diagnosing situations and making choices, and they are less dependent on the knowledge of the educator. Constructing mental models is an important part of our design work.

We try to provide equally valued alternatives. Out of fear and dependency, participants will look to the educators to evaluate choices, alternatives, progress, and participant performance. If we deem a choice worthy of being included in our programs, we give it equal weight with other choices. For example, in the Positive Power and Influence Workshop, we defined and presented each of the four influence styles in a way that favored them equally, differentiating the styles only by describing the results each is likely to achieve. As trainers, we learned to use all four styles flexibly

and effectively. We then switched from one to the other frequently, using each with commitment and evident relish.

We use the approaches and methods of traditional education to support the learner up to the point at which he or she can move ahead independently, For example, we use structured exercises in small groups in the early stages of a program to start things moving and support the participants. If we find participants clinging to the same small group in later stages of the program, we encourage the members to try working on their own. As described in my earlier paper (Harrison, 1972*-a), the staff members are quite directive and supportive with those participants who seem to need it, but only to the point at which they are able to move ahead on their own.

We articulate and foster social norms that support individual responsibility and independence. For example, when we introduce the self directed portion of the Positive Power & Influence Program, we compare and contrast the norms which foster self directed learning with the norms of polite social interaction. Some norms that we have found useful are the following:

- *It is all right to initiate anything that would be useful for one's own learning.* This includes requesting admission to groups already in operation; suggesting that others change what they are doing in order to meet one's own needs; asking others to reconsider their plans for the use of scarce resources; etc.
- *It is all right to withdraw or withhold one's own energy and resources.* You may wish to opt out of previous commitments when something better comes

along. You will want not to join others and not let them join you when what they are proposing does not meet your own needs.

- *The unexamined activity is not worth doing.* Self directed learning works best when the individual is conscious of his or her intentions and goals in undertaking any particular activity. Otherwise, there is a tendency to join into whatever is going on, in order to fill empty time. We encourage participants to use video and audio recordings of their activities, and review them. We advise them to slow down their activities in order to reflect on what they are learning, and draw out the implications from what they observe

We help participants become aware of their own "learning cycles" and use them to guide their activities. The "learning cycle" is our name for the natural process of advance and retreat in learning. I observed in the Autonomy Labs that individuals would move out and take personal risks (e.g., try some activity that was personally threatening) and then would move back to reflect and integrate the experience. During this period, they might be relatively passive (reading books and articles, taking long walks by themselves). The idea of the learning cycle is in contrast to the efforts of many educators who conduct experiential learning events as if they were dramatic vehicles, building the tension and involvement steadily to a smashing climax. Some of our participants spontaneously manage their own stress by this cycle of risk and retreat, but others seem to be out of touch with their own learning cycles or seem addicted to

emotional stress. These people may have to be guided and counseled in order to contact their natural rhythms.

We believe that the freedom self directed learning gives to follow this stress-management cycle is a major reason why our programs can deal with highly charged and deeply personal material with a much lower level of stress than is true of programs based on small group processes. In the latter, all individuals are normally exposed to whatever level of stress exists in the group and are not free either to seek a higher or lower level or to follow their personal rhythms. In self directed learning, the individual can move in or out of risky learning situations at will. We find that participants do not use this freedom to avoid risk, but to manage stress, for the most part responsibly and intelligently.

We design our programs so that the individual is free to move at his or her own pace. I said earlier that self directed learning designs successfully accommodate a wide range of individual differences in level of preparation, readiness for personal involvement, and pace of learning. One reason is that in self directed learning, people do not have to keep up with others. We find that participants tend to develop loose, informal groupings around shared readiness for a general pace or risk level. The self directed format also facilitates individualization of the content of learning, the level of sophistication, and the learning modality. For example, for a number of years I have been involved with the programs for training line and staff managers in consulting skills and the management of change (both with the NTL Institute, and in programs offered by me and my colleagues). Historically, such programs have always been

plagued by large differences in background and orientation of the participants. Some would be working on the most basic and general questions (e.g., "What is organization development?") while others wanted to hone their skills more deeply in specific areas such as one-to-one consultation, team development, and organizational diagnosis. Some would want to learn didactically and deal with the material at an exclusively intellectual level through lectures and discussions; others would press for experiential activities, skill practice, and a high level of personal exposure and emotional involvement. It seemed to be impossible to achieve better than a poor compromise between these polarized demands. Whatever choices the educators made were sure to disappoint or upset a substantial segment of the participants. The programs always seemed fraught with conflict and stress between participants and staff.

In 1972, Fritz Steele and I developed the first self directed design for the NTL Institute's Program for Specialists in Organization Development. The usual strife and stress seemed miraculously to disappear. The high emotional level we had learned to associate with participants in these programs was replaced by a sober commitment to work. Some participants arranged for staff participation in lectures and discussions on basic topics; others joined experiential games and activities; still others practiced basic skills using role playing and videotape feedback. Some stayed safely within the confines of the spaces provided by the course organizers, while others took the wider community as their learning setting. The energy that had gone into conflict in previous programs over what was to be learned and how it was to be learned was channeled into productive learning.

I have since had this experience over and over. Compared to other experiential learning methods, self directed learning channels more energy into work and less into emotionality. Put another way, if one provides participants with a vehicle that is responsive to their individual learning needs, they do not need to fight to have their needs met.

The Future of Self Directed Education

Almost any applied subject can be adapted with profit to the basic design template described in this paper. The usefulness of adult education can be dramatically improved if resources are presented in the ways we have described in this paper, so that learners can spend their time focusing on meeting their own needs, rather than responding to the guesses of educators about their needs. There are some adults who find the requirements for self direction and personal responsibility in learning difficult to adjust to, but my experience is that participants are far more ready for responsibility than educators are to give it to them.

Self Directed Learning Requires Educators to Change

Self directed education requires that the typical trainer or educator change his or her skill mix. Here is where I have found the most resistance to self directed learning. Self directed learning requires a fundamental shift in the locus of control in the classroom, and this shift is difficult for many educators to make. Once participants have gone beyond the diagnostic phase and the self directed activity is well launched, there is often little for the educator to do. The needs of most educators for authority,

visibility, and a sense of personal significance are not well met by the self directed format.

The amount of detailed design and preparation of learning materials required for self directed learning goes far beyond that involved in putting together a syllabus and organizing some lecture notes. Some educators do not possess the design expertise required. I expect, therefore, and my experience so far confirms, that self directed learning methods will be accepted only slowly by educators, in spite of the high degree of acceptance they enjoy with participants. I find most acceptance for self directed learning among young management trainers who share my dissatisfaction with the rigidity of the traditional game of education. When I supply the detailed design work, they can carry out the training effectively and enthusiastically. Some of my most effective collaborators have been former line managers who are in training positions for a limited time. They recognize intuitively the relevance of self directed approaches to on-the-job application. Building from the bottom in this way, I expect change to take place slowly. I shall persist, however, because I believe that self directed learning is the best current approach to management education. It uses the most modern education technology available. At the same time it is personal and custom fitted to the individual's needs. In the best sense of the word, it is humanistic in its respect for the individual's capacity to manage his or her own learning and growth.

