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Choosing the planner

In the previous chapter, the learner faced one or two basic questions: Should I proceed with the learning project? What (generally) should I learn?

We turn now to another basic question he must face at the beginning of a learning project: Who will be responsible for the detailed planning? That is, who will decide just what and how I should learn during each session?

In many adult learning projects, the learner himself handles most of his detailed planning. In some projects, he turns over this responsibility to a group, or to the leader or instructor of that group. In others he relies on an individual with whom he interacts in a one-to-one situation. In a few projects the learner follows the sequence determined by a set of materials or recordings.

The Concept of the Planner

Let us adopt the label *planner* to refer to the person (or group or object) that does most of the detailed day-to-day planning in the learning project. To be more precise, the *planner* is the person or thing responsible for more than half of the detailed day-to-day planning and deciding in a learning project. That is, the planner makes the majority of the decisions about what to learn (the detailed knowledge and skill) in each learning episode, and/or about how to learn (the detailed strategy, activities, and resources). In addition, the planner may also decide when to begin each learning episode, and the pace at which to proceed.

To find out who the planner was when a person learned to speak French, for example, we would seek the answer to the following question: Who decided exactly what vocabulary and grammar he should learn, what sequence he should follow, and what activities (conversation, written exercises, listening to a record, repeating words onto a tape) should be performed in each session? If a person learned about the history of England, we would ask this question: Who or what was responsible for the day-to-day planning, for deciding the precise information to be learned during each episode, and for choosing the reading materials or other resources and methods to use each time?

We do *not* ask who made the initial decision to begin the learning project. The planner is not necessarily the person who decides that French conversation or the history of England should be the content of the learning project. We are not concerned here with what motivates the learner, or with who influences his motivation. We do not ask who made the original decision about how to learn or what resource to use. And we do not assume that the person or resource that provides the subject matter is necessarily the planner.

Instead, we define the planner as the person or thing that is primarily responsible for the detailed (rather than comprehensive) planning (decisions, not motivation or subject matter) for the majority of the learning episodes (from day to day, not just at the early stages). In a sense, the planner is the teacher (in the sense of preparing a lesson plan), curriculum planner, or program planner for this particular learning project.

In some projects, no single person, group, or object dominates the planning. Such learning projects do not have a planner, as we define the term, because no one is *primarily* responsible for the detailed planning of the learning episodes. Instead, a mixture or combination of two or more individuals and things is responsible for the planning.

Over a year, an individual may use several different planners. Several of his learning projects may be self-planned; others may rely on a course or on private lessons.

Distinguishing Different Types of Planners

For discussion and understanding, as well as for research and theory, it is useful to classify particular planners. The learner's behavior and needs may be very different with different types of planners.

I distinguish four types of planners. From the learner's point of view, this is a logically complete list. That is, no other category could be added, though some of the present categories could be subdivided. The learner can choose either a human or nonhuman resource as his planner. If human, the resource can logically be only the learner himself, some other person in a one-to-one situation, or one or more persons in a group situation. These four types of planners will now be discussed in turn.

1. One possible planner is the learner himself. He may make most of the decisions, from one learning episode to the next, about what and how to learn. He may seek information and advice about these decisions from various individuals and materials, but still retain control of and responsibility for the decisions. He may obtain the knowledge and skill from a variety of individuals, books, and programs without giving up the responsibility for *deciding* which resources and activities

to use each time. To refer to a project where the learner himself is clearly the planner, we will use the term *self-planned* learning project.

2. Instead of making most of the day-to-day decisions himself, the learner may decide to follow the sequence of detailed subject matter and activities provided by some object. This nonhuman resource might be a programmed instruction book, a workbook, a set of tape recordings in a language lab, or a series of television programs. The learner turns over the planning responsibility to the object (or, in a sense, to the person who earlier created the object). The plans reside in the object: it provides the decisions and sequence. The set of materials or series of programs will direct the learner's activities and the content during most of his learning episodes. Generally, the object will provide much of the subject matter in addition to directing the learning project.
3. A third type of planner is a person who interacts with the learner in a one-to-one situation, rather than in a group situation. The interaction may be face-to-face, by mail, or by telephone. The person might be a professional instructor, consultant, counselor, athlete, doctor, or lawyer. He might be a friend, neighbor, relative, or colleague. He might provide much of the subject matter, or none at all. Individual lessons from a golf pro, private music lessons, and driving lessons from a friend are examples of learning projects planned by another person in a one-to-one relationship.
4. One other possibility is open to the learner. He may decide to attend a face-to-face group, and to let the group (especially its leader or instructor) determine what and how he learns during each session. The group could be a group of his peers who decide and conduct their activities without a professional instructor or authority. Or the group could be a class, discussion group, workshop, or other group led by a trained leader or instructor. A large portion of the knowledge and skill will typically be provided by the group or its instructor during the group sessions. The group may be of any size from five persons to several thousand.

Sometimes an instructor or other person may help two or three individuals learn. Do we classify this as a group situation or a one-to-one relationship? I classify this as closer to a one-to-one situation, because each of the learners will be receiving a great deal of individualized help and instruction from the person.

Mixed planning

In most learning projects there is clearly a single planner. That is, when one looks at the entire series of learning episodes, it is clear that the learner himself, some nonhuman resource, a certain person, or a certain group was primarily responsible for deciding what and how he learned. The overall planner may be clearly identified, even though the learning project included at least one episode planned by a group, another episode directed by a book or other object, and a few planned by the learner himself.

A few learning projects, however, are not clearly marked by a single planner. The dominant planner may have shifted once or twice during the project. Or perhaps, looking over all the learning episodes, 30% of the day-to-day planning was provided by the learner, 30% by a series of television programs, and 40% by a group and its leader. That is, no one person or object accounted for the majority of the planning. Let us establish a residual category for any project that does not fit clearly into one of the four categories outlined above. We will call this *mixed* planning.

An example

Let us return to the example of the person who decided to learn some conversational French. What might his planning and learning be like with each of the four types of planners?

1. If he decided to plan his own learning project, he would probably use a variety of resources and learning activities. He might listen to French songs and television programs, repeat French words after they are pronounced on a vocabulary record, read French aloud, try to speak French in a few social situations, and attend a few classes or private lessons. He might ask several friends and colleagues to suggest appropriate books and records.
2. Instead, the person might decide fairly early that a nonhuman resource would be far more effective for learning French. He would then locate a suitable series of tape recordings in a language lab, or a set of phonograph records, and would work his way through them. Alternatively, he might depend almost entirely on a series of instructional films or television programs.
3. If he decided that the increased effectiveness was worth the money, he might pay for a series of private lessons with a French instructor, or he might persuade a French-speaking friend to become his tutor. This person would then take on the responsibility of deciding what to do during each session, and what and how the learner should practice between sessions.
4. A language school or adult education institution near the adult's home or work might offer the best way for him to learn. The instructor and perhaps other members of the group would decide what to do during each group session, and would suggest what and how the learner should practice between sessions.

Misconceptions

Before we proceed, let me try to prevent certain misconceptions. First, the four types of planners (or four types of learning projects) are based on who or what *plans* (directs, controls, influences, governs, manages, guides) the detailed content and learning activities from one learning episode to the next. We are not looking at who provides the subject matter. We are classifying the sources of the plans and decisions, not the sources of subject matter or the methods of learning.

Second, only the majority of the planning, not 100%, must be provided by the learner, object, person, or group in order to apply that label. A self-planned learning project, for example, is not considered mixed just because a few episodes are directed by an object or by an instructor.

Third, we do not call an episode or project self-planned just because the learner himself *chooses* the object, person, or group. If he then relies heavily on that object, person, or group for planning most of his learning episodes, the project is clearly not self-planned.

Other classification schemes

While developing this method of classifying learning projects, I found the thinking of several other persons very stimulating. Cyril O. Houle at the University of Chicago has developed a list of about 11 program-planning situations. Coolie Verner (1962), Donald Blackburn (1967), and Clark Moustakas (1968) have also classified learning methods or situations.

Preparatory Steps

Choosing the planner for a learning project is not always a simple or single step. Sometimes the initial choice will be reexamined several times during the project. Also, the learner may have to deal with several related questions and subquestions, and make several detailed decisions.

Four sequences of preparatory steps can be distinguished. The first sequence begins with a decision to gain certain knowledge and skill. The learner then chooses the most appropriate type of planner, and the particular planner. He may carefully review the various possibilities open to him, or he may simply choose an obvious planner or the first one that comes to his mind.

A second possibility is to choose the planner *before* determining the desired knowledge and skill. The person may read a great deal, for example, and usually decide what to read next rather than how to gain certain specific information. Or a man or woman may decide to learn *something* through one television series or another, and only then select the particular series (and thus the particular knowledge and skill). Some adults seem to be habitual course-takers or discussion group members: each September they decide to take another course or join another group that year, and then they look around for the most suitable one.

A third possibility is to choose the subject matter and the planner *simultaneously*. This third method will usually be triggered by an announcement of a "package" of methods and subject matter. The most common example is a brochure, advertisement, or other announcement of a course or discussion group. When the adult becomes

enthusiastic about the knowledge and skill mentioned in such an announcement, he is simultaneously choosing a particular instructor to guide his learning. An announcement of a particular television series could begin an object-planned project. Similarly, an advertisement by a guitar teacher or dancing school could begin a project planned by a teacher in a one-to-one relationship. A review of a particular book could trigger a brief self-planned project.

The fourth possibility is that the learner is required or forced to use a certain planner. He does not really have any choice. The requirements might come from his employer, who sends him to a workshop or conference. Or they might be set by a credit-granting educational institution: "If you want credit for this course, you must attend the particular group."

The Learner's Considerations

What factors does the learner consider when choosing a planner?

Efficiency is often his most important criterion: What is the fastest, easiest, cheapest way for me to learn the knowledge and skill that I want? The answer will depend on certain characteristics of the subject matter, on how the particular person learns best, and on what is available (and at what cost in terms of money and time). Many learners are quite accurate in their estimates of these factors. Many of the influential factors will be considered consciously, while others will be unconscious.

In addition, almost every learner will be swayed by considerations and forces other than efficiency. We all have our preferences for certain ways of learning, as Blackburn (1967) has demonstrated. Our previous experiences, successful or negative, with each type of planner will certainly influence our preferences, as will the advice and reactions of our acquaintances.

The choice of planner will also be influenced by one's emotions and personality characteristics. Each of us feels comfortable or happy in certain situations, but not in others. For some, a medium-sized discussion group is very pleasant; others shudder at the thought of being in such a group. Considering one's probable emotional reactions to certain types of planners is an intelligent and rational act. It makes sense for a learner to try to predict how much negative or positive feeling a certain planner will produce in him, as well as the efficiency involved. The shortest route is not always the most scenic and enjoyable.

Better Help and Competence

Choosing a planner may be a complex and difficult task. Any one of the preparatory steps involved in this decision could be troublesome. For example, the learner may

have little idea of the best way to learn French, or may not know what planners are available. He may have little idea of the costs and benefits of a language lab or a French tutor. As he becomes aware of his need for such information and advice, he may seek assistance from some friend who recently learned French, from his daughter's high school French teacher, or from a library book.

Most learners will want information, advice, and encouragement at this stage, and will then reflect on the alternatives and choose whichever planner seems best to them. Some learners, though, probably want to be told authoritatively which planner to use, and do not want to bother estimating all the costs and benefits of several possibilities.

It may be possible for us to provide much better help for adult learners while they are choosing a planner. It might also be possible to help them develop their own competence at handling this decision.

In addition to "goal-setting consultants" to help with the preparatory steps discussed in the previous chapter, we also need "strategy consultants." Such advisers could help the learner choose one sort of planner or plan his overall strategy. If the learner decides that self-planning is most appropriate, the strategy adviser (especially if he is a subject matter expert) could continue to advise him whenever he has difficulty making the detailed day-to-day decisions.

Both goal-setting consultants and strategy consultants would have to have a great deal of knowledge and skill in the field of adult learning. They could gain this through reading, interviewing, observation, self-analysis, and practice. Consultants could be made available by various institutions, and perhaps some could also be in private practice.

An example

To make some of this discussion seem more real, let us imagine one particular learner approaching one particular consultant. The learner has already decided that he wants to achieve two learning goals: (1) improve his ability to speak effectively and easily before an audience; (2) learn to read some elementary Spanish phrases for use while driving through a Spanish-speaking country.

The consultant decides that his first task is to help the learner become familiar with the various ways in which he can learn in general. He gives the learner a set of printed materials that describe the common methods of learning. These materials describe the characteristics of each method, the sort of objectives for which each is appropriate, and the sort of person who enjoys each method or learns best from it.

The learner then responds to a self-administered questionnaire that helps him discover his own characteristics, his general preferences in methods of learning, and his preconceptions and preferences in methods for his two specific learning goals.

Next he discusses with the consultant the best ways of achieving his learning objectives. The consultant tries to discover any characteristics of this particular

learner and his situation that make the normal or standard sequence of learning activities for learning the given knowledge and skill inappropriate. The helper also makes certain that the learner believes that the planner they choose (or the general strategy or sequence of learning activities) is best for his goals. The learner must be confident that his learning activities will lead efficiently to his learning goals.

As a result of this counseling process, the person may decide to attend a course on public speaking, and to learn Spanish phrases at home from a booklet that provides simple Spanish for tourists (if he can find such a booklet). With the consultant's help, the adult then plans a brief strategy for discovering the most appropriate public speaking course close to his home or office, and for discovering the best Spanish booklet for his needs. In short, after choosing one *type* of planner, he proceeds to choose a *particular* planner for each project.

In order to choose the course, the learner might consult a directory of available courses in his city, or he might visit an adult education counseling service. To choose the Spanish booklet, he might consult a librarian in a public library, or a clerk in a bookstore.

Further Research

The process of choosing a planner for each learning project is an important decision-making process in adult learning. Further research is needed to answer several questions. What factors and characteristics do adults consider while choosing a planner? How careful and appropriate are their choices? How can we improve the effectiveness of their decision-making? That is, how can we help men and women become more competent at choosing a planner for each learning project? And how can we provide better help for them?