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LEARNING PLANS AND MOTIVATION OF ADULT LEARNERS

BY

ELLEN KINSEL

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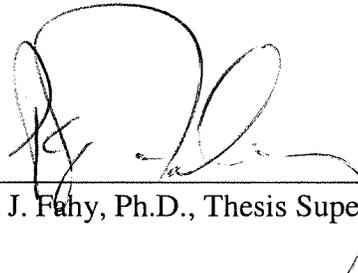
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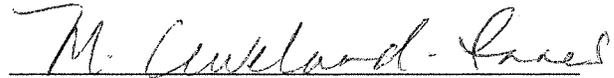
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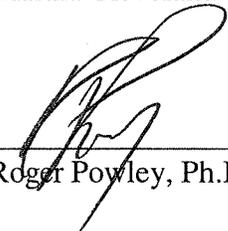
The undersigned certify that they have read and recommend to the Athabasca University Governing Council for acceptance a thesis LEARNING PLANS AND MOTIVATION OF ADULT LEARNERS, submitted by ELLEN KINSEL in partial fulfillment of the requirements for the degree of MASTER OF DISTANCE EDUCATION.



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DEDICATION

To Susan, who has always led the way, and to Jerry, who never asked why I needed to follow.

ABSTRACT

This study emerges from past research into learner attributes, individualized learning plans, levels and quality of learner-facilitator interaction, student support, and factors affecting learning outcomes, satisfaction, motivation, and persistence. This study explores and describes the effects of creating and using an online learning plan on motivation of adult learners in distance delivery high school completion programs. Using a case study approach, two facilitators and six female adult learners were observed as they used an interactive learning plan in distance learning environments for one semester of the 2003 school year. Observation, documentation, and interviews provided information on facilitator-learner interactions in order to assess the effectiveness of the learning plan in supporting distance learners and its influence on motivation and decisions regarding persistence and withdrawal. The findings of this study indicate that these decisions are private, and the reasons leading to a decision may never be known by the institution. The influence of the learner's interpersonal environment has a greater influence over these decisions than institutional factors, although interaction with the facilitator via the learning plan can provide encouragement and motivation to continue. The findings support previous research that links strength of goal commitment, interaction between learner and facilitator, and a positive self-concept to persistence of adult learners in a distance education environment. The online learning plan has the potential to link the learner to her educational program, providing the increased motivation, encouragement, and commitment that are crucial to continued participation and success. However, as noted by the facilitators, time for working on learning plans cannot be left to chance; it must be incorporated into their regular routine, and they must be adequately prepared to engage in learning plan dialogue.

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TABLE OF CONTENTS

	<u>PAGE</u>
CHAPTER I - INTRODUCTION	1
Problem Context	2
Purpose of the Study	4
Research Questions	6
Delimitations and Limitations	7
Definition of Terms.....	10
Summary.....	12
CHAPTER II – REVIEW OF LITERATURE	14
Introduction.....	14
Nature of Adult Learners	14
Self-concept	22
Attrition of Adult Learners	27
Attrition in Distance Learning Environments	35
Learner Support in Distance Learning	41
Importance of Interaction.....	48
Individualized Learning Plans	52
Goal Setting and Motivation.....	62
Relevance of Literature to Current Study.....	66
CHAPTER III – RESEARCH DESIGN	69
Introduction.....	69
Research Methodology	69

Procedures	72
Research Population.....	74
Research Environment	78
The Online Learning Plan.....	79
Data Collection	88
Analysis of the Data	89
Data Validity and Reliability	90
Summary.....	91
CHAPTER IV – RESULTS AND DISCUSSION.....	93
Introduction.....	93
Purpose of the Study.....	93
Data Available for Analysis	93
Observation of the Case Participants	95
Results by Literature Theme	98
Nature of Adult Learners	99
Self-concept	101
Motivation and Persistence	102
Learner Support.....	103
Learner-Facilitator Interaction.....	104
Goal Setting and Persistence.....	106
Discussion of Research Questions	108
How do students make decisions related to continuation in a course or program of study?	109
Does interaction with the facilitator influence motivation?.....	110

Does the use of an online learning plan affect decisions related to continuation in a course or program of study?	110
Does use of this learning plan influence learners' perceptions of interaction and support?	111
Is the learning plan useful as a tool for interaction between facilitators and learners in a distance learning environment?	113
To what extent do facilitators and learners use the online learning plan to communicate in the distance education environment?	115
What components of the learning plan do facilitators and learners find the most useful?	118
Summary of Results	119
Generalizability of the Results	120
CHAPTER V – CONCLUSIONS AND RECOMMENDATIONS	123
Introduction.....	123
Review of Research Results.....	124
Implications for Further Research.....	130
Implications and Recommendations for Distance Education Practice	130
REFERENCES	133
APPENDIX A – CONSENT FORMS	149
APPENDIX B – ONLINE LEARNING PLAN	154
APPENDIX C – COMMUNICATIONS RECORD FORM	163
APPENDIX D – GETTING STARTED WITH THE ONLINE LEARNING PLAN	164
APPENDIX E – SUGGESTIONS FOR WORKING ON YOUR LEARNING PLAN	165
APPENDIX F – FINAL INTERVIEW QUESTIONS FOR LEARNERS	166
APPENDIX G – FINAL INTERVIEW QUESTIONS FOR FACILITATORS	168
APPENDIX H – DATA CODING SAMPLES	171

LIST OF TABLES

	<u>PAGE</u>
Table 1. Orientation to the online learning plan	98
Table 2. Demographic attributes of learner group	100
Table 3. Research questions.....	108
Table 4. Online learning plan journal entries.....	116
Table 5. Online learning plan activity by section	117

LIST OF FIGURES

	<u>PAGE</u>
Figure 1. Elements of a learning plan.....	10
Figure 2. Elements contributing to motivation and persistence for adult learners	125
Figure 3. Environment providing support and guidance	127
Figure 4. Online learning plan model of effectiveness	129
Figure B1. Online Learning Plan – Login Screen	154
Figure B2. Online Learning Plan – Home Page	154
Figure B3. Online Learning Plan – Action Plan.....	155
Figure B4. Online Learning Plan – My Journal (partial).....	156
Figure B5. Online Learning Plan – Learn More	156
Figure B6. Online Learning Plan – Who Am I?	157
Figure B7. Online Learning Plan – Past Learning Experiences	158
Figure B8. Online Learning Plan – Future Learning Opportunities	159
Figure B9. Online Learning Plan – Career and Employment Information.....	160
Figure B10. Online Learning Plan – Setting Goals	161
Figure B11. Online Learning Plan – Celebrate Success	162

CHAPTER I

INTRODUCTION

Researchers (Bernard & Amundsen, 1989; Brown, 1996; Diaz, 2002; Lim, 2000; Parker, 1999; Powell, Conway, and Ross, 1990; Rekkedal, 1982; Thompson, 1997) have been studying attrition in distance education programs in an attempt to understand the causes for non-completion. “The question of why some students successfully study through distance education and others do not is becoming increasingly important as distance education moves from a marginal to an integral role in the provision of post-secondary education” (Powell, Conway, & Ross, p. 5). These studies have been conducted to determine the causal factors determining successful completion or early withdrawal from education at a variety of levels including secondary, adult basic education, degree programs, and corporate training. Morgan and Tam (1999) state, “It is in the interest of distance educators to acquire an insight into both the positive and negative factors that affect student persistence” (p. 99). Through understanding the situational, institutional, and dispositional variables relevant to discriminating between persisters and dropouts, institutions and educators can implement student support systems that include intervention strategies that recognize at risk learners with the intention of improving retention in distance education. This study explores the use of individualized learning plans, a particular type of learner support system, as a medium for communication between the instructor and the learner. The research focuses on the influence of the interactions required to maintain this learning plan on motivation and decisions to continue or withdraw from a course of study.

Problem Context

This study emerges from past research into learner attributes, individualized learning plans, levels and quality of learner-facilitator interaction, student support, and factors affecting learning outcomes, satisfaction, motivation, and persistence. Why are some learners successful while others are not? What personal and environmental factors contribute to learner decisions to continue or not? Can a predictive model be developed that will enable educators to identify learners who are potentially at risk of dropping out? Do models developed for face-to-face learning environments apply to distance education? What types of support interventions promote learner retention? These questions have been of interest to researchers over the past few decades.

Tinto (1975) developed a model that outlines “a longitudinal process of interactions between the individual and the academic and social systems” (p. 94), during which a variety of internal and external factors impact on decisions to persist. This model has been applied successfully in the distance learning environment (Bernard and Amundsen, 1989; Sweet, 1986) with the goal of understanding the factors involved in decisions to continue or drop out, enabling institutions to develop strategies to improve retention (Powell, Conway, and Ross, 1990; Sweet, 1986).

In trying to understand dropout from distance learning programs, Diaz (2002) recognizes that “online students typically possess characteristics that research has linked with academic success” (§ 10) but retention rates are lower than those found in traditional classroom educational environments. Distance students who drop out “may do so because it is the *right thing to do* [emphasis provided]” (§ 10). These students may encounter life situations related to work or family that indicate that the potential benefits of study may be

better realized at some time in the future, when a successful academic career may be more likely. Or, as Rekkedal (1982) points out, “Some students reach their goal before the course is completed” (p. 120). In these cases, dropout can be considered to be a desirable outcome in the long run.

Development and implementation of student support strategies in distance education have not been equivalent to those offered to campus-based students “Even distance educators feel that we do not do as well as we should when it comes to student services” (Rumble, 2000, p. 216). In the distance learning environment, careful thought must be given to appropriate delivery mechanisms for support services to students who will never be physically present at school in the traditional sense. Rumble identifies two reasons for this. First, experience indicates that students need support in order to succeed, and, second, the systems view that we generally use to discuss distance education includes support services.

The provision of appropriate student support services is dependent on understanding student needs. However, as Coldeway (as cited in Thompson, 1989) states, “Information about distance learners is limited and many institutions lack data on the characteristics of their distance learning population” (p. 45). Furthermore, the data collected that describe a student body as a group doesn’t reveal anything about the individual students. Evans (as cited in Rumble, 2000) encouraged distance educators to understand “their students’ contexts through the histories of the individuals themselves, using as much as possible their own words to explore a range of issues that impact on or relate to student support” (p. 223). It appears that not much has changed since Knowles (1980, p. 229) observed that little attention is given to “developing procedures and tools for helping adults diagnose their own needs”

and that this aspect of adult education would benefit from creative contributions by innovative practitioners.

Wolcott (1996) argues that adopting a learner-centred approach assists in the bridging of the psychological distance that contributes to a sense of apartness that other researchers (for example, Bernard & Amundsen, 1989; Sweet, 1986; Tinto, 1975) found lead to discontinuation. “We can minimize distance and its psychological effects by employing methods and techniques to build rapport, decrease isolation, and enhance interaction” (Wolcott, p. 26). Brown (1996) finds that perceived lack of support from tutors and difficulties in contacting them are the major contributing factors in decisions to discontinue for the majority of off-campus students participating in his study.

Information communication technologies (ICTs) provide a means for interaction between student and facilitator, synchronously or asynchronously, one-way or two-way. The development of appropriate tools to carry on the dialogue is necessary. Tait (2000, p. 291) explains that “The use of a variety of media and meaningful engagement with individuals . . . will permit more opportunity to achieve the affective goals of student services, thereby diminishing dropout.”

Purpose of the Study

The purpose of this study is to explore and describe the effects of creating and using an online learning plan on motivation and persistence of adult learners in distance delivery high school completion programs. Using a case study approach, the use of an interactive learning plan in distance learning environments is examined, resulting in an assessment of the efficacy of this method of learner support in assisting learners to make decisions related to continuation in their academic programs.

As Thorpe (2002) warns, it is “particularly challenging to address the issue of learner support in online learning” (p. 107). Potter (1998) informs us that “Literature on support services for distance learners is limited . . . ; literature presenting the learner’s perspective concerning support service needs is sparse indeed” (¶ 2). Tait (2000) concurs: “relatively little has been written about the planning and management of student support” (p. 287). Brigham (2001) states the relationship between online student support services and attrition requires further exploration. Lee (2000) and Visser and Visser (2000) agree that there is a need for research on designing and implementing learner support services in distance learning. Finally, Ryan (2001) acknowledges that there is a lack of systematic research into the efficacy of online support services, most likely due to the newness of their implementation, although a positive relationship is expected between improvement in learner support and improvement in retention rates.

It is the intention of this study to investigate facilitators and learners using a learning plan tool in a distance learning environment to determine its effectiveness in providing support and its contribution to learner motivation and decisions related to persistence. This study will add to the existing literature on persistence in distance education, adult learning, learner support in distance learning environments, the importance of interaction, and the use of individualized learning plans. Therefore, this study will be of interest to institutions offering distance education, online facilitators seeking ways to improve rapport with students, and to the students themselves.

Research Questions

This study focuses on the situational experiences of adult learners in distance learning environments. It is intended to respond to the identified need (Brigham, 2001; Potter, 1998; Ryan, 2001) for research into the provision of student support services and their relationship to persistence in distance education. Hypothetically, an increase in interaction between facilitator and learner, particularly that which is designed to increase rapport or reveal learner attributes associated with a high risk of drop out, should lead to increased retention. The following research questions guided the research and provided a framework for analysis of the results:

1. How do students make decisions related to continuation in a course or program of study?
2. How does interaction with the facilitator influence decisions related to continuation or withdrawal?
3. How does the use of an online learning plan affect decisions related to continuation in a course or program of study?
4. How does the use of an online learning plan influence learners' perceptions of interaction?
5. How does the use of this learning plan influence learners' perceptions of support?
6. How useful is the learning plan as a tool for interaction between facilitators and learners in a distance learning environment?
7. How does the use of the learning plan affect facilitator perceptions of their rapport with learners?

8. How useful is the learning plan as a tool for identifying learner characteristics commonly associated with either persistence or withdrawal?

Because this study is considered to be part of the development process of the learning plan tool, the following questions will also be of interest:

9. To what extent do facilitators use the online learning plan to communicate with learners in the distance education environment?
10. To what extent do learners use the online learning plan to communicate with facilitators in the distance education environment?
11. What components of the learning plan do facilitators and learners find the most useful?
12. What components of the learning plan do facilitators and learners find the least useful?

Delimitations and Limitations

A limitation of this study is the ability of the participants to utilize the technology. Adults returning to a formal learning environment may or may not have experience in using computer technology. The results of this study show that learners may have difficulty accessing the online learning plan or coping with other technological barriers such as error messages they don't understand. The willingness of these learners to use asynchronous and synchronous technologies for interaction with the facilitator may have been affected by their level of technical skill, previous experience, training, and comfort in asking for help with technical problems.

Incompleteness of the record of interactions between facilitators and learners may also be a limitation of this study. While data collection procedures provided information

regarding interactions within the online learning plan tool that took place on the web server on which it is stored, other private communications such as personal email or phone calls were not available as part of the data collection. Facilitators were asked to record the dates, topics, and media utilized for other interactions that occurred; however, this information was not provided because either it was not recorded or records were not submitted to the researcher. A significant volume of interaction occurring outside the context of the online learning plan may have confounded the results of the study. There is little evidence, however, that facilitators and learners participating in this study interacted regularly, but future studies should address this issue.

The time period over which observations were made may be a limitation of this study. This research was originally intended to be carried out over one school term, September through December; however, actual usage was limited to approximately five weeks at the end of the term. This time period may be too brief to provide meaningful results. Even if learning plan usage had taken place throughout the scheduled timeframe, newly returning learners may experience a “honeymoon effect” which provides excitement and motivation to continue that may subside after a longer period of enrolment has elapsed. Awareness of their participation in the research project may also have led to feelings by the learners that they must continue in their course of study at least through the duration of the investigation, although participants were not aware that persistence or withdrawal behaviour was being observed. Also of concern in relation to the timing and duration of the research is the length of time it took the facilitators to become comfortably oriented to the learning plan tool. They may not have had sufficient time or orientation to begin utilizing the learning plan to full advantage. As well, previous experience working with learning plans, with adult learners,

and with technology may impact on the results. A subsequent longitudinal study could address these issues in order to provide better insight into the relationship between the use of the online learning plan and learner motivation.

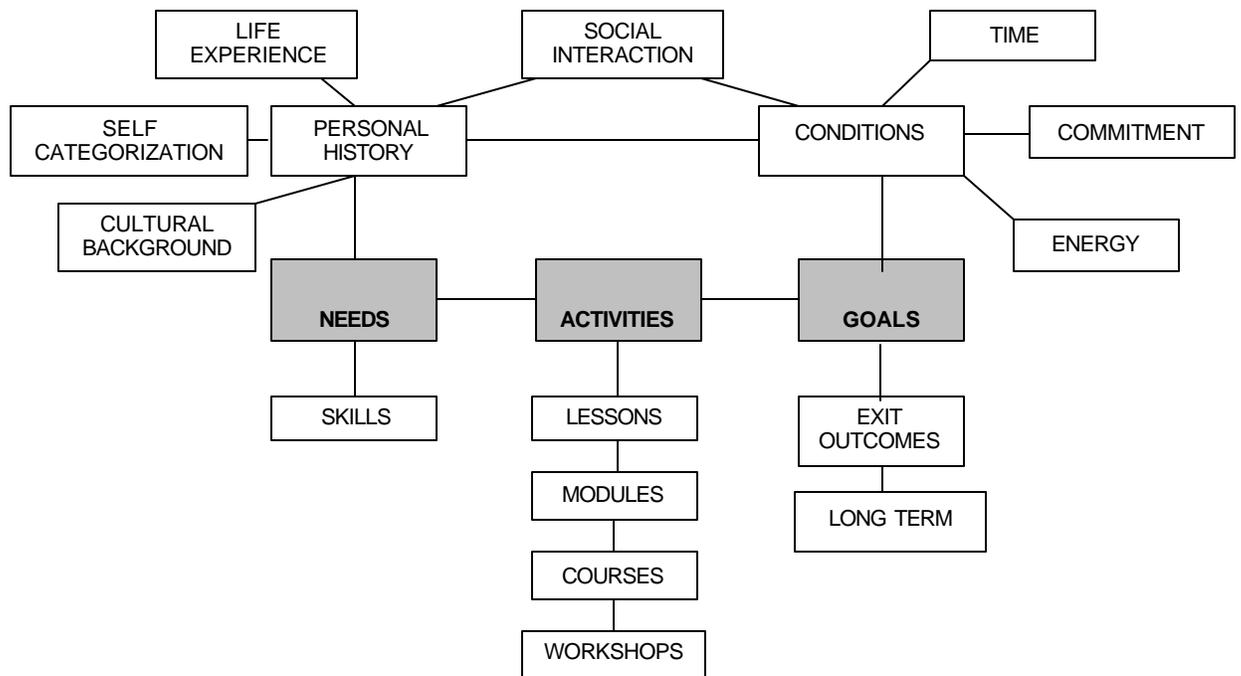
A potential delimitation is restriction of the study to adult returning learners in high school completion programs. The potential value of learning plans extends to all learner groups. However, school-aged learners and adults entering post-secondary programs have different motivations for enrolling and persisting that might have a greater influence over decision-making than would the development of a personal learning plan. For example, parents may require their teenaged child to continue in school regardless of a desire to drop out, or the teen may be responding to social factors related to a strong need to conform within his peer group, the majority of whom are enrolled in some form of high school completion program. On the other hand, continuation for adults may be influenced by significant life events unrelated to their academic programs that impact on their willingness and ability to persist.

In spite of these limitations and delimitations, this study provides insight into the potential value of the online learning plan tool. Issues arising from the conduct of this study can inform future research designs in order to better determine the relationship between use of the learning plan, motivation, and decisions to persist or withdraw from a course of study. It is particularly important that future studies ensure that facilitators are well-prepared to engage in learning plan dialogue, include learning plan interaction in their routine, and document interaction that occurs outside the learning plan. Observing learning plan usage over a longer period of time will also improve the reliability of the results.

Definition of Terms

A **learning plan** is “a series of prompts designed to elicit responses from learners, helping them to articulate their learning needs and personal goals[It is] used to place the student in specific courses or to help the student receive individualized assistance,” helping them become successful learners (Crichton & Kinsel, 2002, p. 144). Originally developed by Crichton & Kinsel, Figure 1 outlines the elements that form and affect a learning plan.

Figure 1. Elements of a learning plan



Adult learners are students over the age of 19. This study focuses on adult learners who have experienced an interruption of more than 12 months in their formal schooling prior to enrolling in their current program of study.

Distance education is typically defined in terms of physical separation. Students are physically (and often temporally) separated from the source of instruction.

Interaction is defined as one way or two way communication that, for the purposes of this study, occurs between facilitator and learner. Interaction can be accomplished through the use of technologies that enable the participants to communicate synchronously or asynchronously using voice, text, or graphic tools. Interaction may be perceived as positive (for example, a question-response dialogue) or negative (for example, flaming or spamming).

Motivation is defined as forces that energize, direct, and sustain human behavior (Huitt, 2004). Motivation can be derived from personal characteristics, needs, and objectives (intrinsic), or from external sources such as material rewards (extrinsic). Linskie (as cited in Madden, 1997) says that motivation is the desire to achieve a goal that has value for the individual.

For the purposes of this study, **persistence** is defined as continuation of enrollment in a course or program of study with progress being made toward completion. Persistence results from directed effort extended over a period of time.

From the organization's point of view, **retention** is defined as the continuation of enrollment or re-enrollment in additional courses of study.

The opposite of persistence, **attrition** is described as withdrawal from a course or program prior to completion regardless of reasons for discontinuation. It is recognized in this research that voluntary withdrawal with no intention of re-enrollment in the future (that is, dropout) is different from forced withdrawal (being asked by the educational provider to leave the program of study for disciplinary or other reasons). Dropout is also different from "stopout" which can be defined as temporary withdrawal or simply a hiatus from formal studies. Attrition can also be the result of conscious decision-making by an individual who recognizes that discontinuation is of greater personal benefit than completing the course of

study. Due to the limited scope of this study, these distinctions are not addressed in analysis of the results as it is unknown whether learners have permanently withdrawn or will return to learning in the future.

In the context of this study, **facilitator** is synonymous with instructor, teacher, or mentor. The term facilitator implies a role different to the traditional dispenser of knowledge that these other words imply, and “the literature of adult education often does not mention the word *teacher*, but employs instead such terms as *leader*, *mentor* and *facilitator*” (Darkenwald & Merriam, 1982, p. 17).

Summary

Educational programs are attracting increasing numbers of lifelong learners, many of whom face situational, institutional, or dispositional barriers that impact on their participation. Although the ability to study at a distance makes programs accessible to larger numbers of adult learners, as Thompson (1989, p. 48) states, “increased accessibility to failure is no victory.” Keegan (1996) suggests that if we accept Tinto’s model linking institutional integration to persistence, “virtually all distance students would be ‘at risk’” (p. 150). It is therefore important for distance educators to support learners as they encounter the academic and emotional challenges of returning to academic programs as adults.

This study emerges from the need to understand the process learners use to make decisions regarding persistence and withdrawal from educational programs and how the use of an online learning plan can affect motivation. The following chapter reviews the literature regarding the nature of adult learners, attrition of adult learners, self-concept, attrition in the distance learning environment, learner support in distance learning, the importance of interaction, individualized learning plans, and goal setting and motivation. These themes

provide the framework for the study described in subsequent chapters. It is anticipated that the results of this study will provide evidence that the online learning plan has the potential to be an effective support mechanism in the distance learning environment and is worthy of further research and development.

CHAPTER II

REVIEW OF LITERATURE

Introduction

The decision to re-enter academic programs after a period of absence is fraught with anxiety for most returning adult learners. As Cross (1981) points out, “dropping out of high school is generally considered failure in our society, and high school dropouts, having experienced educational failure once, are not eager to try again” (p. 56).

Cross (1981) acknowledges that an understanding of the research, along with sensitivity to individual situations, is necessary to assist adults in making the “transition to new and unfamiliar territory” (p. 240). Therefore, the focus of this chapter is a review of the literature on the nature of adult learners, attrition of adult learners, self-concept, attrition in the distance learning environment, learner support in distance learning, the importance of interaction, individualized learning plans, and goal setting and persistence. Although much of the literature focuses on post-secondary learning situations, many of the findings can be applied to adult learners entering high school completion programs.

Nature of Adult Learners

School is identified as the “work” of childhood, and, as Comings, Parella, and Soricone (1999, p. 3) remind us, “A key difference between adult and child learners is that adults choose to participate in educational programs while children participate because of legal mandates and strong social and cultural forces.” In addition to chronological age, adults can be defined in terms of social roles or developmental processes, recognizing that for them “the student role is almost always secondary” because “adults see themselves first in

occupational and/or family roles” (Pappas & Loring, 1989, p. 142). Unlike children, adults make a conscious, voluntary decision to pursue further education (Cross, 1981; Pappas & Loring, 1989); they need to see relevance of learning to their personal situation (Conrad, 2002); they desire a high degree of flexibility (Galusha, 1997); and they have a deep need to be self-directing (Knowles, Holton, & Swanson, 1998).

One of Lindeman’s Key Assumptions About Adult Learners (as cited in Knowles, Holton, & Swanson, 1998) is that adults are motivated to learn as they experience needs and interests that learning will satisfy. Houle (as cited in Witte, Forbes, & Witte, 2002) identifies three reasons that adults participate in learning activities: goal oriented learners seek education as a means to accomplish specific objectives, activity oriented learners find social value in participating in educational endeavors, and learning oriented learners enjoy the pursuit of knowledge.

Pappas and Loring (1985) remind us “it is difficult to isolate single variables or characteristics that predispose participation and persistence and that are consistent across adult populations” (p. 145), and adults “bring with them a set of life experiences, attitudes, and problems to be solved” (p. 158). Hayes (1988, p. 132) emphasizes “the importance of recognizing and accommodating the diversity of abilities, backgrounds, and needs that adults bring to the learning situation.” Their most pressing felt needs prompt adults to seek the logical and shortest route to goals that are based on these needs (Wlodkowski, 1985), often leading to a “conscious decision to pursue further education in spite of competing role or time demands” (Pappas & Loring, p. 143).

Dearnley (2003) states, “it is important to understand the emotional impact of returning to study as a mature learner” because, as Mangano and Corrado (1991, p. 33) point

out, “academic reentry can be a harrowing experience for adult students.” On the other hand, “for some students their studies are a lifeline, something that sustains them when the rest of their lives are in dreadful shape” (Simpson, 2000, p. 32).

Garrison (1985, p. 27) emphasizes that “it is the impact and required integration of school into the total social milieu of the adult learner that will ultimately determine persistence or dropout” and, therefore, the entire socioeconomic environment must be taken into consideration when trying to understand dropout behaviour. Knowles, Holton, and Swanson (1998, p. 67) agree that “in any situation in which the participants’ experiences are ignored or devalued, adults will perceive this as rejecting not only their experience, but rejecting themselves as persons.”

In addition, adults need to substantiate their worth in a competitive academic arena and need encouragement from others for reassurance that their academic goals are credible and attainable (Manga no & Corrado, 1991, p. 35). Wlodkowski (1985, p. 6) agrees that adults “are responsible people who seek to build their self-esteem through pragmatic learning activities in which their competence is enhanced.” Tracy-Mumford (1994) states that adults move toward success, that is, as they experience success and satisfaction, they are more likely to continue.

“Distance learners, like most adult learners, are voluntary participants” (Sheets, 1992, p. 10). They tend to be older (Coldeway, 1986; Thompson, 1989) and more diverse in their educational backgrounds and experiences (Coldeway; McInnis-Rankin & Brindley, 1986; Thompson, 1989) than on-campus students. Their most recent educational experience may be some years past (McInnis-Rankin & Brindley; Sheets), resulting in study skills that may be rusty, inappropriate, or non-existent (McInnis-Rankin & Brindley); insecurities about

learning (Knapper, as cited in Sheets); and a lack of self-confidence (Kahl & Cropley, as cited in Sheets). Distance learners are usually studying part time while engaged in other full time activities such as paid employment (Coldeway; McInnis-Rankin & Brindley; Sweet, 1986), so their role of student is only one among many, creating the potential for conflict between the demands of study and other aspects of life (McInnis-Rankin & Brindley; Sweet).

“Motives for studying at a distance as opposed to studying conventionally relate to both the impracticality of attending a conventional institution and preference for the distance education system itself” (Sheets, 1992, p. 9). Thompson (1989, p. 43) states, “distance-education students tend to be more independent and autonomous learners.” The need for autonomy and independence was also identified by Peters (1992) as one of the characteristics connected to a preference for distance learning. In addition, distance learners have a need for flexibility (Peters) and “value the opportunity to control the pace at which they learn” (Thompson, p. 46).

Distance learners encompass a wide range of demographic and personal characteristics (Coldeway, 1986), and it is important to remember that their social context can profoundly affect their success (Gibson, 1998a). Potter (1998) suggests that

For distance learners, continuing their education requires the linking of two worlds, that is, their personal sphere with that of the institution. Although the same might be said of any educational experience for any learner, the need for integration is emphasized by the personal characteristics of these particular learners (adults with home, family, employment and community responsibilities) and by the lack (for the majority of these distance students) of the institution’s physical presence in their everyday lives.

The interactions between the learner and her multiple environments “produce constancy and change in the characteristics of that person over time” (Gibson, 1998a, p. 114). Knowing the characteristics and demographics of distance learners can help us understand the potential barriers to learning that might be encountered (Galusha, 1997) and may necessitate forms of support that differ from those available to students in traditional settings.

“Starting or restarting study is about fresh beginnings and the importance of that beginning to the student can seldom be underestimated” (Simpson, 2000, p. 148). In her study of women between the ages of 37 and 50 returning to school to study nursing by distance, Dearnley (2003) found that “participants entered the programme demonstrating an array of emotions ranging from the fear that they might lack ability to ‘do the work,’ to excitement and delight at ‘being given an opportunity.’”

Dearnley’s (2003) study group is an example of a return to learning in response to a specific need (career opportunities) which Houle (as cited in Cross, 1981) identifies as the motivation for adult learning. Knowles (1980) and Wlodkowski (1985) state that adults are ready to learn when there is a need to know something in order to perform more effectively in some aspect of life. “A self-diagnosed need for learning produces much greater motivation to learn than an externally diagnosed need” (Knowles, p. 232). In addition to need, Wlodkowski identifies five other factors that affect learner motivation: attitude, stimulation, affect, competence, and reinforcement (p. 56). “Adults want to be competent and often seek learning as a means to this end” (Wlodkowski, p. 213).

Knowles, Holton, and Swanson (1998) perceive internal pressures such as the desire for increased job satisfaction, self-esteem, or quality of life as the most potent motivators. They also recognize that adults are responsive to external motivators (better jobs,

promotions, higher salaries). Dearnley (2003) identifies two types of motivators that learners encounter: life responsibilities (the social and professional roles likely to be constant and predictable), and life events (the unpredictable traumas and stressors that accompany adulthood such as bereavement, divorce, pregnancy, and new relationships).

A complex web of social circumstances frequently results in the decision to return to education (Pascall & Cox, as cited in Dearnley, 2003). A survey by Aslanian and Bricknell (as cited in Waniewicz, 1982) found that 83% of adult learners “identified some past, present, or future change in their lives as reasons to learn” (p. 88). Comings, Parella, and Soricone (1999) classify external events as dramatic (e.g., job loss), less dramatic (e.g., parent decides he needs more education when children enter school), or subtle (e.g., has always felt the desire to study and finally has time available). Wlodkowski (1985) finds that most adults give practical, pragmatic reasons for learning, needing courses and training “not so much because they want them, but because they need the jobs, the promotions, and the money for which these learning experiences are basic requirements” (p. 218).

Unfortunately, external events may cause adults to feel they have little choice or sense of volition when returning to learning and, therefore, there is little intrinsic motivation. “Ideally, in terms of motivation, adults want to be successful in learning activities that they willingly pursue, that fulfill important needs and motives, and that offer some pleasure in the actual process of learning” (Wlodkowski, 1985, p. 279). Motivation is unstable, easily influenced by the degree of satisfaction or success attained in addition to myriad other personal and environmental variables. However, Cross (1981, p. 55) states that “learning is addictive; the more education people have, the more they want, and the more they will get,”

and Wlodkowski, p. 4) agrees that “the more that people have had motivating learning experiences, the more probable it is that they will become lifelong learners.”

In spite of a high degree of motivation, prospective learners may encounter barriers that prevent them from participating in educational programs. These barriers may be personal, institutional, or dispositional. Personal barriers, what Mahoney (1991) terms “internally generated baggage” (p. 53), may include unwillingness to deal with a problem, not recognizing a need, a desire for protection against discrimination, or an inner commitment to self and family. A lack of confidence and fear of failure are also identified as deterrents to participation by Darkenwald & Merriam (1982), Roberts (1984), Kerka (1986), and Garland (1993). Darkenwald & Merriam (p. 140) relate fear of failure to social roles such as women in the role of wife and mother who have not had a sense of personal efficacy reinforced outside the environment of the home. Mahoney (1991), Mangano and Corrado (1991), and Garland (1993) also identify the comparison of self to others, in particular a determination not to be perceived or treated by a fellow adult as “dumb,” or anxiety about ability to compete with younger students, as being significant. In addition, Darkenwald and Merriam (p. 140) recognize that “institutions, persons, and groups in one’s social environment – in the home, the work place, and the community – exert strong pressures on the individual to conform to prevailing values and norms.” It is difficult for adults to overcome a social environment that contributes to negative perceptions of the value of education (Kerka, 1986; Witte, Forbes, & Witte, 2002) or affects feelings of self-worth through messages that come from well-meaning friends, relatives or others (Mahoney, 1991). “Partners can be resentful and even obstructive” (Simpson, 2000, p. 103).

Ludwig-Hardman and Dunlap (2003) identify other psychological factors that influence learning and performance. These include emotional investment, strategic self-directedness, and independence and autonomy. Gibson (1996, p. 32) states,

there is a variability among students in their willingness to assume control, in part as a result of negative assessments of their abilities as learners. The movement from dependence to independence is not linear, given the situational nature of academic self-concept and the impact of course-related variables.

Kerka (1986) also cites values, attitudes, beliefs, or opinions as additional variables associated with participatory behaviour.

Institutions cannot directly motivate learners, but they can make learning opportunities stimulating and attractive (Wlodkowski, 1985). In spite of best intentions, however, learners may be frustrated by red tape (Mangano & Corrado, 1991), inaccessibility, lack of support services, or prohibitive costs (Kerka, 1986), and non-receipt of materials or difficulty in receiving quick and meaningful feedback (Roberts, 1984). “Some students describe their initial experience with distance learning as frightening and intimidating. It takes time and energy to overcome the fear of failure and move toward the development of self-confidence in pursuing their educational goals” (LaPadula, 2003, p. 123).

Most barriers to participation, however, are beyond the control of either the individual or the institution. They arise from the situations in which adults find themselves that deter them from entering or continuing in educational programs. These include prior learning (Burge, 1988; Commonwealth of Learning, 1999), the length of time they have been away from school and their unfamiliarity with effective study habits, lack of prerequisite

knowledge, not being part of an academically-oriented milieu (Garland, 1993), individual family or home related problems and or incompatibilities of time and place (Kerka, 1986), lack of time or money (Witte, Forbes, & Witte, 2002), or the stress of trying to balance multiple roles (Garland; Kerka; Li, Lee, & Kember, 2000; Mahoney, 1991; Mangano & Corrado, 1991; Peters, 1992).

To summarize, although, as Lim (2000) states, “people tend to avoid threatening situations which would require them to exceed their coping skills” (p. 38), life transitions such as job changes, marriage, arrival of children, “empty nesting,” or retirement may prompt adults to voluntarily seek new learning opportunities. Individual characteristics and life circumstances have a great impact on adult participation in educational programs. It must be recognized that for adult learners, the role of student is only one among many, and their social context influences their participation. Even those who are highly motivated are constrained by family, job, and community responsibilities that interfere with their academic pursuits. The barriers to participation can be categorized as being related to personal characteristics, attitudes, and self-perceptions about the adult self as a learner, life circumstances that conflict with participation, or institutional practices and procedures that may exclude or discourage adults from participating. The next section explores the effect of a particular individual attribute, self-concept, as it relates to academic performance.

Self-concept

Gibson (1996, 1998a, 1998b) has explored the nature of academic self-concept, the factors that influence it, and the relationship between academic self-concept and attrition in distance learning. She defines academic self-concept as “the sense of personal competence and related confidence in his or her ability to succeed in the chosen educational endeavour”

(Gibson, 1996, p. 25). Adults may have a positive general self-concept, but a poor concept of self as a learner and “the extent to which they can resolve these perceptions and concerns positively appears critical” (Gibson, 1998a, p. 118). Low levels of self-confidence in ability to learn may be the result of earlier negative schooling experiences (Dearnley, 2003). Academic self-concept changes with time and experience through the process of learning as an adult and the process of learning at a distance (Gibson, 1998b, p. 67); however, Wlodkowski (1985) finds that the older the learner, the more difficult it is to change self-concept.

Pyryt and Mendaglio (1996) found that self-concept is derived from three perspectives; reflected appraisal, social comparison, and attribution. Reflected appraisal is the perception of how one is seen by significant others and is affected by the degree of accuracy between perception and reality. Social comparison is the perception of how the self compares to others, which will be affected by the degree of similarity between the individual and the reference group being used for comparison. Finally, attribution is how an individual sees himself. “These perceptions are formed through his experience with his environment . . . and are influenced especially by environmental reinforcements and significant others” (Shavelson, Hubner, & Stanton, 1976, p. 411).

A formal method of creating reflected appraisal used in the corporate environment is 360 degree feedback. This technique provides an individual with the opportunity to receive performance feedback from a variety of co-workers, supervisors, reporting staff members, and clients which is then responded to in a self-assessment component. The process “allows each individual to understand how his effectiveness as an employee, co-worker, or staff member is viewed by others” (Heathfield, 2004).

Self-concept becomes increasingly differentiated with increasing age and individual experience, especially as refined verbal skills are acquired to label perceived attributes (Shavelson, Hubner, & Stanton, 1976). Shavelson, Hubner, and Stanton contend that experiences are the basis of self-concepts that are hierarchical and multifaceted in structure. A particular experience may affect aspects of one's social, emotional, physical, or overall general self-concept without affecting academic self-concept. Song and Hattie (1984) identify the structure of self-concept and its relationship to academic achievement in terms of family structure (birth order, number of siblings), social status (occupation, level of education, ability to afford further education), and family psychological characteristics (encouragement and expectation, educational activities and interests, evaluation of intellectual qualities, rewards and punishments). "These three components of self-concept all relate to academic achievement, but the primary effect is via academic self-concept" (Song & Hattie, p. 1279).

Other research (Brookover, Thomas & Paterson, 1982; Lim, 2000; Lyon, 1993; Mboya, 1989; Wlodkowski, 1985) has also shown that academic self-concept is closely linked to academic achievement. An individual's concept of his own academic capacity is reflected in behaviours indicating his ability to participate and achieve success in academic tasks as compared to others engaged in the same task (Brookover, as cited in Lim, 2000). Wlodkowski also relates a positive self-concept to academic achievement, stating that particular learning environments "can nourish and replenish even a poor self-concept that has been weakened by other harsher and more barren learning situations" (p. 89). Gibson (1996, 1998b) concurs, noting that by understanding the nature of academic self-concept, distance

educators can pay attention to the institutional factors that influence it in order to contribute to increased persistence.

Wiseman and Hunt (2001) state, “How learners see themselves, as successful or unsuccessful learners, has bearing on whether they, in fact, will be successful or unsuccessful.” Conversely, Shavelson, Hubner and Stanton (1976) contend that successful or unsuccessful actions will affect perceptions of self. Michael and Smith (1976) also support the interactive influence of actions and self-concept when they state “frequent success leads to further success; repeated failure, to a greater sense of failure, frustration, and alienation” (p. 522).

Self-concept is closely related to what Bandura (as cited in Sweet, 1986, and Lim, 2000) calls self-efficacy, or the belief in one’s own capabilities to organize and execute a course of action and to control events that affect one’s own life. Lim observes “students with high-self efficacy tend to work harder and persist longer than those who doubt their learning capabilities” (p. 41). An important aspect of self-efficacy as it relates to academic achievement is locus of control, the degree to which individuals perceive that events that impact their lives are under their control (Wiseman & Hunt, 2001). Students who believe that external forces such as luck or ease of task determine their achievement see themselves as having less power over their surroundings and what happens to them, whereas students with greater internal locus of control “generally have more confidence in themselves, are greater risk takers, are more curious, and anticipate success rather than failure when they enter into learning activities” (Wiseman & Hunt, p. 46).

Wiseman and Hunt (2001) posit that students with greater external locus of control experience higher levels of anxiety than students with a higher level of internal locus of

control. However, they continue by saying that a small amount of anxiety (termed *facilitating anxiety*) can improve performance as a person strives to lessen the gap between perceived current status and desired status. *Debilitating anxiety*, on the other hand, state Wiseman and Hunt, impedes successful performance. They caution, however, that sources of anxiety that may be facilitating for some students may be debilitating for others depending on the varying personal needs and characteristics of the students.

Research (Crichton & Kinsel, 2003; Witte, Forbes, & Witte, 2002) has shown that enrolment and success in educational programs is dependent on the ability of adult students to perceive themselves as belonging in the academic environment regardless of predisposing characteristics that contribute to a self-concept of failure in educational pursuits. Wiseman and Hunt (2001) state, “The social and psychological bonding that comes when students feel that they are true members of the classroom group influences the level or degree to which motivation will occur and academic engagement and learning will take place” (p. 53). Battistich, Dolomon, Kim, Watson, and Schaps (1995) also attribute increased motivation to students experiencing “the school as community when their needs for belonging, autonomy, and competence are met within that setting” (p. 629)

In summary, how learners perceive themselves, as successful or unsuccessful in academic pursuits and as rightfully belonging in an academic community, has an influence on whether or not they will indeed be successful. The anxiety that can arise from the perceived gap between the current self and the desired self can be either motivating or debilitating. In the later case, it may lead to attrition, the subject discussed in the next section.

Attrition of Adult Learners

Tracy-Mumford (1994) states that attrition is a concern because it translates into both student and program failure. While it is true that “student retention does not guarantee program completion for all students, student attrition guarantees non-completion” (Tracy-Mumford). However, not all researchers agree that the goal of student retention should be to keep students until program completion has been accomplished. Woodley and Parlett (1983) emphasize the need to know more about the psychological processes involved in becoming, then ceasing to be, a student and suggest that “research into student drop-out can never produce all the answers but there are a number of ways in which it can inform discussion and assist policy-making” (p. 22). Langenbach and Korhonen (1988, p. 137) agree that “the likelihood of getting simple answers to the complex question of who persists and why is still remote.”

“Defining dropout is no simple matter” states Tinto (1985, p. 28), and the term itself means different things to different people (Woodley & Parlett, 1983, p. 2). If we accept that students enrol in educational programs with the goal of completing them, “the term dropout should be applied, if at all, only to those forms of departure involving individuals who are unable to reasonably complete what they came to the institution to achieve” (Tinto, p. 39). Noncompletion may be viewed by the individual as personal failure to achieve a reasonably held goal (Tinto, p. 40), and by the institution as a failure to facilitate the achievement of desired educational goals (p. 29).

However, dropout cannot simply be defined in terms of withdrawal prior to program completion particularly when considering adult learners. Pappas and Loring (1985, p. 139) remind us that we must get beyond defining dropout and retention in traditional terms “if we

are to recognize the unique nature of adult students' educational patterns and goals." Kerka (1995) acknowledges this by describing "the phenomenon of stopping out – one or more cycles of attending, withdrawing, and returning" as being "typical of adults who must place the student role on the back burner temporarily." Including temporary withdrawals as dropouts would be misleading. Comings, Parella, and Soricone (1999, p. 4) agree that within a program context, some dropouts would be better classified as "persistent learners who are not presently attending formal classes" as they will return to programs "as soon as the demands of their lives allow" (p. 3). Peters (1992, p. 235) also sees a necessity to differentiate between students dropping out of courses and those who are interrupting their participation due to illness, conflicts in their environment, or lack of success in their studies. Woodley and Parlett (1983, p. 3) define an additional category of drop downs as those who succeed in some but not all of their courses. Finally, while not offering an alternate term, Tinto (1985, p. 40) states that "it [is] also incorrect to label as dropout all those forms of departure that arise from substantial forms of incongruency between the individual and the institution" such as discovering that course content varies from expectations. Pappas and Loring (1989, p. 146) also consider the educational environment as being a factor contributing to attrition along with student characteristics and situational variables.

Institutions tend to view all departures as failure even though as Simpson (2000) states, potential dropout activity usually generates no response from the institution and students are "allowed" to leave without any effective action to stop them. This view of departure is incorrect as "it fails to distinguish between the variety of influences on student actions and fails to take into account the distinct patterns of individual experiences which give rise to these departures" (Tinto, 1985, p. 39). Researchers (Moore, 1989; Rekkedal,

1982) have observed that students may stop work on a course before its completion, “causing educators to worry about ‘drop-out,’ while in fact, the learners have simply achieved their own personal objectives” (Moore, p. 160). If the institution’s mission is to serve individual needs and interests, it is inaccurate to label all departures negatively if those needs have been met. Tinto (p. 40) reminds us that “the simple act of leaving should not be defined as dropout when that departure represents the attainment by the student of a sought-after goal” and students “have accomplished what they came to the institution to do” (p. 33). This is supported by Simpson (2000, p. 140) who states, “students who withdraw can . . . be perfectly satisfied with their experience but will count as a failure from the institution’s perspective.”

In addition to goal attainment, another reason for withdrawal that should not be termed dropout is transfer to other institutions. “Again, labelling such departures as dropout misrepresents them and denies the importance of the effect of social and intellectual maturation” (Tinto, 1985, p. 34). Withdrawal that is the result of an informed decision should not be deemed a failure “because ‘informed withdrawal’ is accompanied with a plan for future action” (Tracy-Mumford, 1994) and “it may serve to highlight an elusive, absent aspect of self-confidence, strength of will or resilience” (Garland, 1993, p. 191). Cullen (as cited in Kerka, 1995) specifically states that in adult basic education, “noncompletion is the most successful outcome” as learners become able to make more informed decisions about educational goals to pursue. Students may enter with the intention of gaining employment skills for job promotion or occupational certification, and “short-term rather than full-term attendance may be sufficient to achieve their educational goals” particularly for those whose educational goals exceed what is offered by a particular program or institution (Tinto, p. 33).

Peters (1992) warns us to resist labelling all withdrawals negatively as “the benefits of studying are in no case zero for the drop-out and the economy. Anyone who has studied . . . has . . . increased his knowledge, abilities and specific experience” (p. 257).

Dirkx and Jha (1994), Tracy-Mumford (1994), and Kerka (1995) all describe attrition as a significant problem in adult basic education. However, Pappas and Loring (1985, p. 139) state the concepts of attrition and retention must be thought of differently for adults, and they remind us that “adults, being problem-centered, role-bound, ‘part-time,’ and self-directed, will have unique patterns of attendance depending on life circumstances.” Following Cross’s (1981) model, they encourage us to consider the factors that facilitate attrition: situational barriers flowing from real life events and circumstances; institutional barriers arising from typical administrative and educational practices, and dispositional barriers that arise from prior experience and self-perception.

Situational barriers include a lack of time (Comings, Parella, & Soricone, 1999; Waniewicz, 1982), mobility problems (Waniewicz), financial constraints (Anderson, 1985; Waniewicz; Woodley & Parlett, 1983), isolation from the institution (McInnis-Rankin & Brindley, 1986), lack of child care (Kerka, 1995), change in marital or parental status or other family obligations (Anderson; Woodley & Parlett), and work demands and conflicts (Anderson; Kerka; Woodley & Parlett).

Educational institutions, like other service industries, have many opportunities to provide satisfaction for their clients (the students) with a cumulative effect that “determines whether the client is dissatisfied (drops out) or satisfied (completes the course)” (Sewart, 1993, p. 7). Institutional factors which affect satisfaction include course design and content, workload, level of difficulty, costs, faculty behaviour and instructional style, frequency of

meetings, attendance requirements, and length of program (Pappas & Loring, 1985; Waniewicz, 1982; Woodley & Parlett, 1983).

Regardless of the current situations in which learners find themselves and the practices of institutions designed to attract and retain them, students bring a variety of background characteristics with them when they enrol in educational programs. These dispositional variables include family characteristics, individual aptitudes, personality orientations, educational and career aspirations, and past educational achievement and experience (Kerka, 1995; Pascarella, 1980; Tinto, 1975). Cross (1981) views participation and dropout in adult education as a function of the discrepancy between self-concept and key aspects of the educational environment. Knowles, Holton, and Swanson (1998) perceive a conflict between the psychological need of adults to be self-directing and their earlier educational conditioning in a dependent model (i.e., “sit back and teach me”). Reaction to this conflict is to flee from the situation causing it “which probably accounts in part for the high dropout rate in much voluntary education” (p. 65). Other psychological factors such as intelligence, academic aptitude or ability may also influence dropout decisions. Pappas and Loring (1985, p. 148) state that “one consistent finding is that the presence of anxiety, whether related to feelings of inadequacy, fear of class content (for example, mathematics), fear of failure, or to external factors, predisposes a student to drop out.” However researchers (Comings, Parella, & Soricone, 1999; Noel, 1985; Pappas & Loring) have found that achievement of some level of educational success increases the likelihood that learners will persist.

Noel (1985) and Kerka (1995) suggest that dropout is a complex decision that is the result of a combination of factors. Although we can identify the forces that produce either

attrition or persistence, these forces vary in intensity and type from person to person and from group to group (Anderson, 1985, p. 50). Consequently, Pappas and Loring (1985) feel that “in seeking to isolate critical variables that predict persistence or attrition we may be setting an unrealistic goal” (p. 146). This process may be compounded by students providing only one reason for withdrawal when in fact there may be multiple contributory factors, blaming the institution rather than personal difficulties, or rationalizing their academic failure by referring to other external pressures such as a lack of time (Woodley & Parlett, 1983, p. 8). Cullen (as cited in Kerka, 1995) finds that the reason given at the time of leaving is often the “last straw” or the least threatening to reveal. Dirkx and Jha (1994, p. 270) point out that “for a relatively high percentage of noncontinuing students, the reasons for leaving a program are simply not known.”

In spite of the complexity of the process of withdrawal, researchers have attempted to develop models which can be used for predicting dropout behaviour. Tinto’s (1975) model is based on the concepts of academic and social integration which lead to goal commitment and institutional commitment which in turn affect the likelihood of persistence or withdrawal. Although his model was specifically designed to describe behaviours in post-secondary situations, Kerka (1995) discusses the examination and refinement of his model “to determine whether it applies to non-traditional students, whose participation is complicated by competing external factors—jobs, family responsibilities, financial problems.”

Tinto (1975) states that individuals enter educational institutions with a variety of attributes, experiences, and backgrounds which impact on their performance in the current education pursuit. These factors also influence the development of educational expectations and commitments. “It is these goal and institutional commitments that are both important

predictors of and reflections of the person's experiences, his disappointments and satisfactions" (Tinto, p. 95). In addition, "the model argues that it is the individual's integration into the academic and social systems of the college that most directly relates to his continuance" (p. 96). LaPadula (2003, p. 123) supports this notion that "students' retention, completion, and satisfaction depend heavily on achieving a sense of connection with the institution."

Tinto's (1975) model includes sets of individual characteristics and dispositions relevant to educational persistence, including such dispositional factors as social status, previous educational experiences, gender, ability, race, and ethnicity, as well as "expectational and motivational attributes of individuals (such as those measured by career and educational expectations and levels of motivation for academic achievement)" (p. 93). Witte, Forbes, and Witte (2002), however, feel that Tinto's model excludes identity development. They contend that "an inability to resolve the identity dilemma is the result of what is seen as incongruous demands between the culture in which one was raised and the culture into which one seeks entry as an adult." In other words, they view persistence as the result of the ability of individuals to perceive themselves as belonging in the academic environment regardless of predisposing characteristics that contribute to a self-concept of failure in educational pursuits.

Witte, Forbes, and Witte's (2002) identity dilemma is similar to Boshier's (1973) model which explains dropout as the result of "a number of incongruencies (between self and ideal self, self and other students, self and teacher, self and institutional environment)" (Cross, 1981, p. 119). Boshier (p. 260) states

for an individual, congruence produces a sense of satisfaction or fulfillment, whilst stress and discomfort are concomitants of dissonance . . . [and] . . . both adult education participation and dropout can be understood to occur as a function of the magnitude of the discrepancy between the participant's self-concept and key aspects (largely people) of the educational environment.

Anderson (1985) favors Lewin's force field analysis as an explanatory model for the decision-making process leading to withdrawal or persistence, and Woodley and Parlett (1983) and Keegan (1996) describe a similar interplay of push and pull factors. Driving, or push, forces, such as wanting to complete a degree in order to get a job promotion, or having an encouraging spouse, or liking to finish something once it is started, contribute to goal fulfillment. On the other hand, restraining, or pull, forces resist and impede change. These might include a desire to spend more time with family, finding the course content very difficult, course fees are high, or another educational opportunity is available that better suits the individual's needs. "Each of these factors has different strengths and drop-out will occur when the 'pull' factors outweigh the 'push' factors" (Woodley & Parlett, p. 21). On the other hand, if the push factors greatly exceed the pull factors, it will take a dramatic new pull factor such as a death in the family or job relocation to cause withdrawal. Woodley and Parlett and Anderson agree that identifying the driving and restraining forces provides an opportunity for the institution to try to increase the former and decrease the latter in order to encourage persistence.

In summary, research into attrition of adults stresses the importance of assuming a holistic perspective that considers the interaction among a variety of psychological and socioeconomic factors arising from both the school and non-school environments. Defining

dropout is no simple matter as the term means different things to different people. Models designed to describe the process of persistence or withdrawal are based on commitment and integration (Tinto), congruence between self and others (Boshier), and the push/pull factors of Lewin's force field analysis (described by Woodley & Parlett). The next section will discuss these and other models as they apply in distance learning environments.

Attrition in Distance Learning Environments

“There is no area of research in distance education that has received more attention than the study of dropout” (Garrison, 1987b, p. 95), but in spite of the attention that the phenomenon of dropout in distance education receives, no theory exists to adequately explain it (p. 100). High attrition rates in comparison to on-campus programs and political pressures that place administrators in the position of justifying the educational and financial feasibility of distance learning programs are two of the factors contributing to the focus on attrition in distance education (Bernard & Amundsen, 1989, p. 27). Tresman (2002) adds to these the economic concerns of a competitive marketplace and the lost investment in students who later drop out. Ludwig-Hardman and Dunlap (2003) attribute the concern to the challenge for distance education providers of retaining students once they have begun.

Measuring attrition rates can reveal trends, but “what needs to be done in conjunction is to indicate the reasons which lie behind student withdrawal” (Garrison, as cited in Brown, 1996, p. 45). Lee (2000, p. 182) agrees that research can provide valuable insights to understand underlying hindrances or barriers encountered by distance education students. Garrison (1985, 1987b) emphasizes the need to look at the social, psychological, and economic context in which the distance learner exists rather than trying to isolate one or two

variables for examination; however, he identifies communication needs as being particularly salient as they are what make distance learners different from other adult learners.

Simpson (2000, p. 144) encourages researchers to examine the events leading up to dropout rather than looking at it after it occurs. He asks,

Why in particular might two students experience apparently similar events – illness and bereavement – and yet one be able to continue whilst the other withdraws? There may be several answers to this question – some of them will be intrinsic to the student and depend on personal qualities and circumstances. Some of the answers may be susceptible to influence by the institution and with very little evidence, I believe that some kind of proactive contact from the institution may well be the key to student progress (p. 144).

The importance of the role of the institution in enhancing persistence is also emphasized by Brown (1996), Garland (1993), Morgan and Tam (1999), Parker (1999), Powell, Conway and Ross (1990), and Sheets (1992).

Unfortunately, a large proportion of students prefer to drop out without communicating the reasons or indicating the type of problems they are experiencing (Roberts, 1984, p. 62). As is the case for adult learners in general, the decision to persist or not persist in distance education is complex, involving a number of interrelated factors (Morgan & Tam, 1999). These factors can be categorized as situational (the result of the general situation or environment of the student), institutional (factors put in place by the educational provider), or dispositional (stem from personal background, attitude, or self-confidence).

Learners may find themselves in situations that disadvantage them “relative to their classmates in ways that impact their ability to persist” (Garland, 1993, p. 192). Spitzer (2001) and Tresman (2002) attribute the high dropout rate in distance learning to students having so many other competing priorities related to changes in family or employment circumstances, illness, bereavement, or work commitments. Lack of time is frequently cited as the reason for withdrawal from distance education (Brown, 1996; Simpson, 2000; Sweet, 1986; Tresman). Other situational factors contributing to dropout are inappropriate course choice (Brown; Peters, 1992; Simpson) and lack of adequate feedback or support (Brown; Galusha, 1997; Simpson).

Course content can affect student persistence (Galusha, 1997), especially when there is a gap between expected and delivered content (Garland, 1993). Many of the institutional factors which have an impact on decisions to persist or withdraw are not specifically related to course content. These include course delivery variables, institutional policies and interventions, and interactions with tutors or other institutional personnel. Sheets (1992), Peters (1992), Brown (1996), and Bernard & Amundsen (1998) all mention difficulty in contacting tutors and insufficient support from them as contributing factors to the decision to continue in a course or program of study.

In terms of the effect of dispositional factors on persistence of distance learners, Sewart (1993) states that “for those who are less well prepared, less well motivated or more socially disadvantaged the success rate has been nowhere near as satisfactory” (p. 7). Researchers (Diaz, 2002; Sheets, 1992; Simpson, 2000; Thompson, 1989) find that students exhibiting qualities such as lack of motivation, insecurity, unrealistic expectations, poor academic skills, poor study habits, and a lack of goals can be labelled “at risk” and unlikely

to successfully complete their studies. Withdrawal occurs when “students with lower scholastic ability, lower self-confidence, and greater socioeconomic change . . . set unrealistic goals for themselves and have unrealistic expectations of the program resulting in an incongruence” (Garrison, 1985, p. 36) or “when there is a disconnect between the learner’s goals and priorities and the level of commitment required to be successful” (Ludwig-Hardman & Dunlap, 2003).

Recognizing the value of identifying potential dropouts, distance educators are interested in adapting existing models of attrition or developing new ones. Gibson (1998b, p. 74) states, “if a reliable and valid measure could be designed, one which takes into consideration the adult as learner, the educational program content, and the context of distance education, it could be used to identify learners who are potentially ‘at risk’ of failure.” However, as Brindley (1988, p. 132) points out, “the relative importance of variables in an interactional model of attrition is entirely dependent on the particular student population, and what students perceive and experience as being important to their persistence.” Garland (1993, p. 195) concurs that “the numerous complex variables that differentially act and interact in affecting the student” create a context which is idiosyncratic in nature and therefore might not lend itself to modelling.

Nevertheless, attempts have been made to evaluate the usefulness of the Tinto and Boshier models in the context of distance education. Brindley (1988) suggests that adult part-time students do not fit the Tinto model because they have much less interaction with faculty and fellow students than younger part-time students who spend much more time on campus. Hence, social integration as

defined by Tinto does not contribute in the same way to their goals and institutional commitment (p. 132).

Peters (1992) and Keegan (1996) also reject Tinto's model which is based on the strength or weakness of integration of the student into the social fabric of the institution. Using this measure, they describe almost all distance students as being at risk of withdrawing as their integration is fragile because they, by definition, do not take part in the life of the institution. On the other hand, Sweet (1986) and Bernard and Amundsen (1989) regard the Tinto model as an appropriate framework for research on and explanation of student attrition in distance education, although they caution that course differences and other modifications of key elements may alter the relative strength of influence of the various factors in the model over decisions related to persistence or withdrawal.

Garrison's (1987a) research in distance education shows that persisters view themselves as different from their peers. This is opposite to Boshier's congruence model which would predict that incongruities between self and the environment result in anxiety and a more likely occurrence of dropout.

Bean and Metzner (1985) developed a conceptual model of student attrition for non-traditional students. Their model is based on the direct or indirect contribution of four sets of variables to dropout decisions. Background and defining variables include age, enrolment status, residence, educational goals, high school performance, ethnicity, and gender. Academic variables include study habits, academic advising, absenteeism, major certainty, and course availability. Environmental variables include finances, hours of employment, outside encouragement, family responsibilities, and opportunities to transfer. Finally, psychological outcomes such as perceived utility of studies, satisfaction, goal commitment,

and stress may also affect persistence or withdrawal decisions. Brindley (1988) adapted this model specifically to apply to distance education students. For example, she views enrolment status as a program or non-program student as a possible indicator of commitment. While removing ethnicity from the group of background variables, she added highest level of education achieved. She also indicates that residence of distance learners (urban versus rural) may provide different motivations or variations in available resources which influence persistence. In Brindley's model, absenteeism is not included in the group of academic variables as it does not apply to distance learners; however, she has added to this group the following factors: information/orientation, study skills assistance and other forms of instructional support, course content and design, deadlines/schedules/pacing, assessment, and significantly, for this study, career planning. The only adaptation Brindley made to Bean and Metzner's group of environmental variables is the addition of changes in time available or circumstances that might influence the distance student's perception of ability to persist. To the group of psychological outcomes, Brindley adds personal realization of capability to do the work and the importance of completing the course.

A similar model has been developed by Powell, Conway, and Ross (1990) that uses a comprehensive approach in taking into account all of the experiences of distance learners as well as the unique nature of the distance learning environment. In this model, three groups of factors interact to affect student persistence. The first group is predisposing characteristics that are present before and during student involvement in distance education. Institutional factors such as quality and difficulty of instructional materials and access to and quality of support, comprise the second group. The third group of factors are described as life changes such as illness, relocation, or altered employment status. Powell, Conway, and Ross clearly

point out, however, that “life changes and institutional factors do not, in most cases, act as direct causes of student dropout” (p. 9). They do so in interaction with predisposing characteristics.

In summary, as Kemp (2001) states, “persistence in distance education is a complex phenomenon influenced by a multitude of variables” (p. 42). As individuals encounter life events and assume a variety of roles, there are variations in their response to stress and adversity. Some will be able to overcome their vulnerability because of protective mechanisms that increase resilience. However, adult learners will not persist if courses or programs do not satisfy their learning needs or lead to achievement of personal goals. We must remember that withdrawal cannot always be deemed failure as it may be the result of mature, well-informed decisions and, therefore, may not necessarily be a negative outcome. The next section explores strategies for supporting learners in order to promote educational success.

Learner Support in Distance Learning

Concern regarding retention has led to an increased interest in student support (Rumble, 2000). Although factors such as lack of time, work commitments, change in career plans, finances, illness, or unsatisfactory living or study conditions are outside the immediate control of the educational institution, Ryan (2001) concludes that extension of student support services should result in improvement in retention rates. Kemp (2001) views a supportive learning environment as contributing to student empowerment and optimism, characteristics associated with persistence in distance learning. Tracy-Mumford (1994) states “effective support is directly related to student retention and student success.” However, as

Visser and Visser (2000) and LaPadula (2003) observe, student support “has often been an overlooked component in distance education systems” (p. 119).

The need for student support services in the distance learning environment can be well justified. As distance education programs attract and serve increasing numbers of students who are unable to attend on-campus classes, support services are a necessary and cost-effective way of retaining those students (Simpson, 2000, p. 179). Rumble (2000) concludes “learners without support are likely to delay completion of a program or drop-out altogether” (p. 221) and support services should begin with students’ needs (p. 223). Stewart (1993, p. 11) views student support services as the interface between the institution and the learner. Success in distance education programs depends on a balance between the teaching package and the advisory and mediating function (Stewart, p. 27), but, as LaPadula (2003, p. 127) points out, “distance learners need to access services in the same way they access instruction: from a distance and at times that fit their schedules.”

“Our experience tells us that students need support if they are to succeed” (Rumble, 2000, p. 219). However, research shows that learners require different types and levels of support, and support services must be constructed within the context of the needs of the students. “Learners who are very highly committed and confident will need less support. Conversely, those who have low commitment and low confidence will need more support” (Knowles, Holton, & Swanson, 1998, p. 145). Simpson (2000, p. 88) finds that “students with little or low previous educational experience are likely to need considerably more support with various aspects of learning skills than conventional students” and Wheeler (2002, p. 426) adds that “females may require more support than males, and those who

approach study in a generally shallow manner may require more help than those who possess skills for deeper and more ‘meaning’ oriented learning.”

The purpose of providing student support services is to remove barriers and promote academic success. Tait (2003) summarizes the rationale for student support into three areas: cognitive (supporting and developing learning), affective (related to emotions that support learning and success, and systemic (helping students manage the rules and systems of the institution in ways that support persistence). “Student support services can and should assist distance learners to cope with the transitions they experience” (Potter, 1998). Comings, Parella, and Soricone (1999, p. 7) emphasize the importance of educational programs in helping adult students build self-efficacy about reaching their goals. Li, Lee, and Kember (2000, p. 16) agree that a positive perception of ability to succeed enhances confidence and motivation to continue. In addition to increasing self-confidence, effective support can “increase positive feelings about learning, improve self-image, create emotional well-being, help individuals through personal and educational transitions, and assist student in solving problems and coping with stress” (Tracy-Mumford, 1994).

“There is evidence to suggest that anxiety or psychological discomfort resulting from learning at a distance may increase rather than decrease as time goes by” (Jegede & Kirkwood, as cited in Wheeler, 2002, p. 420). Moore (2003, p. 142) concurs that emotions such as insecurity in the student role, defensiveness against the kinds of personal change that accompany learning, need for reassurance, and dependence on authority “are the source of great difficulty in sustaining motivation in the isolation of the distant environment.” Simpson (2000, p. 31) states that “motivation is an essential of student progress” but students can lose touch with what has been driving them up to that point. Dearnley (2003) finds that

motivation is severely jeopardized when working in an environment that is not supportive. In their study of students participating in a Web-based course, Visser and Visser (2000) found that students think “help in staying and/or becoming motivated to finish the course was the most important affective help they would want” (p. 113).

“Learner support services are thus a critical component of an effective retention program” (Ludwig-Hardman & Dunlap, 2003), although, as Moore (1989, p. 177) points out, “support services are not responsible for making students successful.” Rather, support services have a responsibility to assess students’ needs, to develop and have available for consumption whatever resources are required to fulfill those needs, and to make sure that the students whose needs they can fulfill know what is available and how to make use of it.

A variety of support strategies have been found to be effective in the distance learning environment. First, support systems should recognize the differences between individual students. Information can be gathered regarding “students’ skills, knowledge and interests in order to support them in making appropriate choices” (Simpson, 2000, p. 33), as well as to determine “the kind of support they expect and . . . the areas in which they expect to experience challenges” (Visser & Visser, 2000, p. 115). Both Potter (as cited in Ryan, 2001, p. 76) and Wolcott (1996, p. 25) encourage the development of a learner-centered approach to distance education, beginning with an investigation of the factors that affect students’ disposition to this form of learning and other factors that might inhibit enrolment, progress, and motivation.

Second, sustained communication between the learner and the institution is important (Anderson & Garrison, 1998; Peters, 1992; Rumble, 2000; Simpson, 2000). Interaction can enhance the students’ academic and social integration “so that isolation, about which so

many distance students complain, can be overcome” (Peters, p. 264). Tracy-Mumford (1994) identifies several support strategies that can be enhanced through increased interaction. These include

- Displaying respect, building rapport, establishing trust
- Providing educational and career planning counselling
- Setting realistic expectations and goals
- Building commitment
- Sustaining attendance
- Overcoming embarrassment or self doubt and building confidence
- Developing problem solving skills and effective coping strategies
- Referring students to appropriate agencies or services to respond to non-academic needs.

Li, Lee and Kember (2000) caution, however, that “care should be taken in providing that help though, to ensure that tutoring and counselling do contribute to a growing sense of self-direction and do not lead to continuing dependency” (p. 25).

Scaffolding is a third effective strategy according to Ludwig-Hardman & Dunlap (2003). Scaffolding can allow the learner to accomplish a task that would otherwise not be possible, motivates the learner, helps to ensure learner success, reduces frustration, and can be removed when the learner is ready to assume more responsibility.

Finally, regular recognition of progress and celebrations of achievements provide adult learners with authentic evidence of success (Comings, Parella, & Soricone, 1999, p. 7).

All of the strategies discussed above require the distance education tutor to assume multiple functions. Coldeway (1982) states that these roles are different from those of a

classroom teacher and include administrator, counsellor, facilitator, motivator, and recordkeeper (p. 31). Knowles (1980) describes the role of adult educators as entailing “the involvement of clients in a penetrating analysis of higher aspirations and the changes required to achieve them, the diagnosis of obstacles that must be overcome in achieving these changes, and the planning of an effective strategy for accomplishing the desired results” (p. 37). To this end, Knowles lists the following functions of adult educators: diagnostic function (helping learners diagnose their needs), planning function (designing a sequence of experiences that will produce the desired results), motivational function (creating conditions that will cause the learners to want to learn), methodological function (selecting the most effective methods and techniques), resource function (providing human and material resources), and evaluative function (measuring the outcomes of the learning experience). The interactions required to fulfill the variety of functions “help students feel connected to the institution while scaffolding self-directedness” (Ludwig-Hardman & Dunlap, 2003) by encouraging learners to articulate their learning goals and plans, understand their learning orientations, strengths, and areas for improvement, advising learners on the exploration and selection of learning opportunities that will meet their needs, guiding learners as they progress toward their goals, and encouraging learners to evaluate their own progress.

McInnis-Rankin & Brindley (1986) note that “a trend in student support as well as instruction is the growing interest in the use of technology in order to provide delivery of services to the distant learner” (p. 79). Technology offers opportunities to enhance student support. Tait (2000, p. 288) argues that information communication technology (ICT) “presents enormous opportunities to rethink student support in ways that are not yet fully understood, in particular with regard to time and place, and the social dimensions of

learning.” The Commonwealth of Learning (1999) states that the use of ICT is vital to the provision of adequate support to distance learners; however, Anderson & Garrison (1998) caution that supporting interactions through technology requires access and opportunities to become proficient with the technology in use. Ryan (2001) also warns that “the digital divide (measured as economic, social and dispositional factors) may actually exclude many students if ICTs are the sole form of student support” (p. 91).

Rumble (2000) believes that new technology enables innovation to occur, and he recommends the use of Bates’ (1995) ACTIONS (access, costs, teaching/learning, interactivity and user friendliness, organization, novelty, speed) model for determining technological media selection for the delivery of student services. Rumble adds issues such as what kinds of support are needed, what approaches best meet these needs, and what technologies are available for supporting learners to those listed for consideration by Bates under the category of teaching/learning.

In summary, increased concern over attrition in distance learning environments has led to an increased interest in student support issues. Student support can remove barriers and promote academic success if it addresses individual learner needs, involves sustained communication, provides opportunities for scaffolding, and recognizes progress and achievement. In order to provide effective student support, the role of the distance education tutor expands to include a variety of functions beyond that of content delivery and interpretation. Finally, technology can be used to deliver student services to distant learners. The interaction between the learner and the institution that is an important element in the provision of learner support is explored further in the next section.

Importance of Interaction

Key to all theories of learner support, states Thorpe (2002, p. 110), is interpersonal interaction “because it is the only way of addressing the needs of learners in the terms in which those learners wish to express themselves.” Riffée (2003) emphasizes the value of the human touch to distance learning programs through interactions that establish a valuable connection to the institution and give the learner a greater sense of intimacy with the program. Thompson (1997) found that students leaving distance education programs were much less satisfied with the level of communication than those who persisted, and Brown’s (1996) findings indicate “difficulty in contacting tutors and insufficient support from them were major contributing factors to the decision to discontinue” (p. 65). As Chen (2001a, p. 460) states, “Of all teaching and learning behaviours, interaction is fundamental to the educational transaction and the effectiveness of distance education programs.”

Kearsley (1995) states, “one of the most important instructional elements of contemporary distance education is interaction” (p. 83). One of the guidelines Kearsley provides for improving the degree of interactivity in distance learning is that it must be planned in order for it to occur or be meaningful. In his study of participants in the Educational Technology Leadership program, Kearsley concludes that interaction increases the motivation of students to complete their courses. This conclusion is supported by Crichton (1997) in her study of the New Directions in Distance Learning program in British Columbia. Crichton states that the introduction of intentional online interaction dramatically increases distance education course completion rates. However, both Kearsley and Crichton agree that it is difficult to isolate the effects of interaction from other facets of the learning environment.

Interaction between learners and facilitators and between learners and their peers has been shown to be a significant influence on student behaviours, attitudes, and educational outcomes. Pascarella (1980, p. 546) describes an individual's interpersonal environment as the people with whom he is in contact on a direct basis. We can expect individuals to change in the direction of reducing differences between themselves and the features of their interpersonal environment to which they are attracted. Thus, interaction with faculty members will increase the likelihood of the student being influenced by faculty attitudes and intellectual values.

Rumble (2000) points out in a summary of research findings regarding student support services that contact between students and educational providers is beneficial and valued by the learners especially when it occurs early in the first year of study. Stewart (1982) encourages institutions to assign the original tutor encountered by a student to the role of advisor throughout that student's educational career. He states, "it is this individual and long standing relationship that breaks down the isolation of the home-based student through the provision of sympathetic help in planning a beneficial work pattern in a highly complex system" (p. 28). Riffie (2003) agrees that "a warm personality and a clear personal commitment by the facilitator are intangibles that can often overcome even the thinnest ties between a student and their distance learning program." Garrison (1987b, p. 96) also concludes that the rapport between students and the institution supports student motivation which points to the potential impact that interaction can have on the success and continuance of distance study.

In order to develop this rapport, Flottemesch (2000) encourages facilitators to study the characteristics of the students, discover why they have enrolled, their educational

experiences, and their interests. “This can help the teacher build a role as facilitator in assisting the creating of an atmosphere conducive to student interaction” (Flottemesch). Roberts (as cited in Sewart, 1993) suggests that facilitators should be “conscientious, concerned people, easily approachable and accessible to students” (p. 68).

“Individuals who take a personal interest in students and relate to them as persons can promote persistence in a variety of ways,” states Anderson (1985). These include helping students identify and clarify purposes for enrolling and anticipated outcomes, affirming students as persons in terms of potential, abilities, skills, worth, and uniqueness, and helping students deal with patterns of self-defeat and sources of anxiety. Garrison (1987b, p. 98) claims that an integrated tutor counsellor can make a distance learner feel less isolated and significantly reduce dropout.” Pascarella and Terenzini (as cited in Pascarella, 1980; and Sweet, 1986) report two additional findings: the quality of interaction may be as important in influencing voluntary persistence/withdrawal decisions as the frequency, and interactions may have a different kind of influence for different kinds of students. As Moore (1989, p. 172) points out, “the interaction has to happen at the right time, when the students want it, and its content must match the students’ needs.”

Interaction between facilitator and learner is one area where technology has been found to have a significant impact in distance environments (Galusha, 1997; Moore, 1993). The physical separation of mentor and learner that is inherent in distance education creates a psychological and communications space, described by Moore as transactional distance, a variable depending partially on the development of dialogue. Moore views dialogue as “purposeful, constructive and valued by each party” (p. 24). Manipulation of the communications media has an impact on the extent and quality of dialogue between

facilitators and learners and thus has the potential to reduce the transactional distance. Chen (2001a, 2001b) finds in her study of distance learners in Taiwan that higher skills in the use of technology and increased online interaction result in perceptions of decreased transactional distance.

In addition to dialogue, Moore (1986) perceives structure as a critical factor lying at the heart of all educational transactions. He states,

If there is dialogue and no structure the teacher can adjust to the learner's intellectual abilities, physical state, cognitive style, and emotional needs. In particular, teaching can be organized according to the learner's own learning program. However, where there is no dialogue and there is a high degree of structure, there can be no negotiation or consultation about program plans; the learner must then follow the teaching program exactly as it is presented (p. 5).

Moore (1993) suggests that patterns of learner personality characteristics lead to preferences for learning transactions that vary in their degrees of interaction and structure. Moore hypothesizes a relationship between transactional distance and learner autonomy. "Students with advanced competence as autonomous learners appeared to be quite comfortable with less dialogic programmes with little structure" while more dependent learners preferred more dialogue or more structure (p. 32).

In summary, regular interaction between learner and facilitator can be an effective strategy to enhance learner motivation and success. This interaction enables the facilitator to understand learner needs by acknowledging the broad social context in which each individual exists, what each learner brings to the course at the beginning, what has been accomplished,

and what has changed over the span of course enrolment. Technology can be an important means of carrying on the dialogue between facilitators and learners.

Individualized learning plans provide a starting point for intentional, sustained interaction. They are discussed in the next section.

Individualized Learning Plans

Knowles (1986) reminds us that each learner is unique. Approaches to learning must be highly individualized, because personal, environmental, social, and institutional attributes form what Pascarella (1980, p. 568) describes as “a profile of individual differences.” As the learning process takes place, these attributes, including needs and goals, change as a result of altered conditions, intellectual growth, and/or altered self-concept. Knowles maintains that by incorporating intentional, flexible learning plans that are developed through an interactive process between learner and facilitator, utilizing available technology as a tool, the learning experience will be restructured from a content plan (how knowledge will be transmitted) to a process plan (how knowledge will be acquired). The plan should serve as the means for determining individual attributes, learner needs and goals, learning resources and strategies, evidence of mastery of learning objectives, and methods of evaluation. It should also include a mechanism for ongoing revision as personal circumstances change.

Cross (1981) calls for a pragmatic approach to finding out what the learners want from educational programs and then providing it. She values learning contracts because “the learner is in a better position than anyone else to plan an appropriate learning program” (p. 229); however, “students in the formal educational system are rarely asked to think about what they should learn or how they should learn it” (p. 249).

Determining what the learner brings to the learning environment, and what they need in terms of support, is a challenge identified by Hughes (2004) who states,

We identify real needs best if we know our learners. Therefore, we must ask questions about the learner's readiness for online learning, access to and familiarity with the technology required, proficiency in the language of instruction, individual learning style, and educational goals, as well as how aspects of the individual's culture can affect learning (p. 368).

Hughes supports the use of online resources designed to assist learners to determine their interests and skills. She suggests that learners should explore first, then receive assistance from facilitators as needed; however, if assistance is not readily available, "the online environment is one in which learners can 'fall through the cracks'" (p. 375).

One method of determining student needs is through an individualized learning plan, something Knowles (1986), Bork (2001) and Ball (1994) state every learner should have. Crichton and Kinsel (2002) view learning plans as a mechanism that enables "teachers and students to engage in a process that invites regular, reflective consideration of the students' needs and goals" (p. 145). Also called learning contracts (Knowles) or profiles (Advocates for Community-based Training and Education for Women, ACTEW, 1998), learning plans "provide solutions that use strategies to address individual needs and promote or influence individual success" (Martinez, 2000).

A learning plan is also a tool that helps learners to identify and value their skills and experience. The learning plan "focuses and builds on learners accomplishments and abilities rather than on deficits, allowing learners to articulate and display what they already know and can do" (Weddel & Van Duzer, 1997). The ACETW regards its Skills and Knowledge

Profile (SKP) as valuable for recording self-assessed skills and knowledge to identify interests and skills, clarify a career path, and “legitimize and further one’s prior learning” (Morais, 2001). Through the process of completing the SKP, students gain more self-confidence by realizing how much they have already learned, identify the skills they have that are not job specific, recognize skills for improved income and greater employment security, make better use of what they already know, improve access to formal education and training, and identify gaps in knowledge or skills and develop a plan to fill them (ACETW, 1998).

Gibson (2001, p. 3) suggests that personal learning plans can create a longitudinal record of growth and change. Referring to the Personal Learning Planner (PLP), Gibson states

The PLP is designed to assist learners through the processes of: self-assessment of strengths, interests and aspirations; planning preservice education learning goals and projects; linking goals and projects to valued outcome standards; creating original work and sharing the work with others; validating the achievement of learning goals; and assisting in the selection and preparation of exhibits of learning.

The concept of individualized learning plans is not new. It has been more than two decades since Kapfer and Kapfer (1978) observed that the use of learning plans promotes confidence and commitment in learners as they “examine their own feelings and formulate their own preferences, values, and goals” (p. 60). Personally developed goals are likely to be more realistic for each student at his or her stage of development.

Elements of learning plans are found in a variety of models of learning and motivation. Keller's (as cited in Chyung, 2001, and Small, 1997) ARCS (attention – relevance – confidence – satisfaction) model can be used to increase the motivational appeal of instruction. For effort to occur, the learner must value the task and must believe success is possible. “The learning task needs to be presented in a way that is engaging and meaningful to the student, and in a way that promotes positive expectations for the successful achievement of learning objectives” (Small). Attention strategies arouse and sustain the learner's curiosity and interest. Relevance strategies link learning objectives to the learner's needs, interests, and motives. Confidence strategies develop the learner's positive expectation for successful achievement. Satisfaction strategies provide extrinsic and intrinsic reinforcement for the learner's effort.

Another model that incorporates elements of learning plans is Carroll's model of school learning developed in 1963 (Reeves, 1999). This model relates five factors to academic achievement: aptitude (time needed to learn), opportunity (time available to learn), ability to understand instruction (language comprehension and learning skills), quality of instruction, and perseverance (time student is willing to spend on a given task). In his adaptation of Carroll's model to the online environment, Reeves includes the characteristics that learners bring to the learning environment and the origin and strength of their motivation as components of aptitude. He also adds task ownership, sense of audience, and support as contributors to academic achievement.

Knowles (1986) also described a model of conditions conducive to learning that can be addressed in learning contracts and through the actions of the facilitator. The first condition is that learners feel the need to learn. This is enhanced by exposing the learners to

new possibilities for self-fulfillment, helping learners clarify their own aspirations for improved performance, and helping learners diagnose the gaps between their aspirations and their present level of performance. The second condition is a learning environment characterized by physical comfort, mutual respect and trust, mutual helpfulness, freedom of expression, and acceptance of differences. It is the facilitator's responsibility to provide comfortable physical conditions in a face-to-face environment or to encourage the distance learner to create a comfortable physical learning environment. Facilitators must also accept learners as persons of worth, build relationships of trust, and expose their own feelings and contribute their resources in the spirit of mutual inquiry. The third condition is that learners perceive the goals of the learning experience to be their goals. By involving learners in a mutual process of formulating learning objectives that meet their needs, facilitators can develop this perception. Fourth, learners must accept a share of the responsibility for planning and operating the learning experience. Facilitators can shape the learners' thinking about the methods and resources available and assist them in making appropriate decisions. Knowles' fifth condition is that learners participate actively in the learning process, and facilitators can encourage participation through methods such as organizing project teams. The sixth condition is that the learning process is related to and makes use of the experience of the learners. Facilitators can help the learners exploit their own experiences as resources for learning, modify presentation of resources to the learners' levels of experience, and help learners to apply new learning to their personal experiences, thus making the learning more relevant and integrated. The final condition is that learners have a sense of progress toward their own goals. Facilitators can involve the learners in developing mutually acceptable

progress toward the learning objectives and help them to develop and apply procedures for self-evaluation according to these criteria.

A strategy gaining popularity as a record of academic achievement is the use of electronic portfolios. Barker (1996) describes ePortfolios as records of formal and experiential learning across educational programs and learning experiences that “may provide a more complete picture of the skills and knowledge that a person possesses” (p. 6). She suggests that the benefits of ePortfolios include “better planning of learning needs, motivation to learn effectively, helping to choose what to learn and lessening waste due to wrong choices” (p. 6).

Knowles (1980, p. 229) acknowledges that engaging learners in the reflective process of revealing weaknesses, i.e., the need for additional learning, can be both strange and threatening. “It is crucial, therefore – particularly in the case of adults having their first andragogical experience – that ways be devised for helping participants get into a self-diagnostic frame of mind.” Regardless of the challenge it presents, Knowles lists diagnosing learning needs as the first step in developing a learning plan. Additional steps in the process require the learner to translate needs into objectives, specify learning resources and strategies, specify target dates, specify evidence of accomplishment, specify the criteria for judging the evidence, and review the plan with consultants. Knowles encourages learners not to hesitate to revise their learning plans as they go along because “your notions about what you want to learn and how you want to learn it may change” (p. 385). Finally, learners should evaluate their learning in order to get assurance that they have in fact learned what they set out to learn. Similar learning plan development processes are described by O’Banion (as

cited in Crockett,1985), Ludwig-Hardman & Dunlap (2003), and the Public Service Commission of Canada.

The ACETW stresses that an instrument such as their SKP, which is intended to be used with adult learners, can be implemented using a variety of methods. Group discussions on skills and experiences encourage confidence and thought. Consulting with friends and family helps individuals to identify their personal skills and knowledge. Finally, one-to-one discussion with a facilitator, allowing free flowing discussion, but focusing on the SKP serves to “relax the respondents and alleviate the intimidating nature of the document.”

Two important features of individualized learning plans are involvement of the learners themselves in their development, and the plan must be continually revisited and revised. Knowles (1980, p. 48) emphasizes the need to involve adult learners in the “process of planning their own learning with the teacher serving as a procedural guide and content resource” because of the tendency of human beings “to feel committed to a decision (or an activity) to the extent that they have participated in making it (or planning it).” Knowles thus links the self-diagnosis of learning needs and a clear sense of direction for improvement with motivation. Wlodkowski (1985, p. 115) states that “because the learners have greater personal control in determining and understanding what their learning needs are, their motivation and involvement for the resulting learning experience should be enhanced.” Tracy-Mumford (1994, citing Tinto, 1975) concurs that “active involvement in establishing the learning objectives will increase student commitment to the program” and make it more likely that they will persist when obstacles occur.

Wlodkowski (1985) and Simpson (2000) caution that learners may not undertake the process of self-assessment seriously, may provide biased responses due to perceived social

desirability, or may be unaware of their personal motives or how to explain them. However, Knowles, Holton and Swanson (1998, p. 212) describe the development of learning contracts as “a vehicle for making the planning of learning experiences a mutual undertaking between a learner and his helper, mentor, teacher, and, often, peers.” Hayes (1990, p. 34) states “the use of learning contracts in distance education as well as other settings demands that the instructor spend considerable initial planning time with learners” although Knowles (1980), Ball (1994), Tracy-Mumford (1994), Comings, Parella, and Soricone (1999), and Lee (2000) describe learning plan development as a continuous, rather than a one-shot, activity. The changing needs of individual learners over time demand systematic and continuous efforts to identify, analyze, synthesize, and assess those needs (Lee, 2000, p. 181). Amending a student’s learning plan in response to changing needs or goals sustains student motivation and increases the likelihood for completion. “Regularly reviewing student progress toward their goals is critical to helping students stay focused and makes the learning relevant” (Tracy-Mumford).

The facilitator plays an important role in the development of student learning plans. Darkenwald and Merriam (1982, p. 19) describe the counselling function as “the provision of information about educational and career opportunities, assistance in making educational and occupational choices, and help in dealing with problems that interfere with the learning process.” Crockett (1985) sees the advisor’s role as assisting students in the clarification of their goals and in the development of educational plans for the realization of these goals. “It is a decision-making process by which students realize their maximum educational potential through communication; it is ongoing, multi-faceted, and the responsibility of both student and adviser” (Crockett, p. 248).

Facilitators “must be trained to help learners identify their learning needs” (Ludwig-Hardman & Dunlap, 2003), and they “must learn how to translate a question about course selection (an information question) into a question of goals” (Walsh, as cited in Crockett, 1985, p. 248). Hiemstra (1985, p. 21) lists the following characteristics of effective facilitators of adult learning: viewing themselves as advocates of lifelong learning, recognizing and accepting the value of noninstitutional learning, being familiar with the research and specialized vocabulary of self-directed learning, actively seeking contacts with providers of materials and equipment so they can deal with a great diversity of learning plans, strategies, and outcomes, and being willing counsellors, assistants, problem solvers, and lifelong learners themselves.

Knowles (1980) describes the facilitator’s role as one of process designer and manager. This role requires relationship building, needs assessment, involvement of students in planning, linking students to resources, and encouraging student initiative (Carlson, 1989). Goodnight, Randolph, and Ziekkel (1998) studied the use of Knowles’ andragogical learning contract methodology in three courses that primarily enrol adult learners. They support Knowles’ suggestion that the instructor’s role changes from being a content provider to a facilitator of the students’ learning process. The instructors in their study reported a more involved learning relationship with their students and increased ability to specifically help each student to accomplish their objectives.

Carkhuff (2000) defines the essence of the helping (facilitator) role as assisting the helpee (learner) in exploring, understanding, and acting on her problems and goals. This process involves communicating an interest in the experiences of the learners, motivating them to become involved in the helping process. The learners “must first explore where they

are in order to understand where they want to be” (p. 126). The facilitator can then assist them in defining their needs and transforming their needs into goals. Once goals have been defined, the facilitator assists in the development of action plans to achieve these goals. In so doing, the facilitator becomes an agent of change.

According to Hiemstra’s discussion of learning contracts (see <http://www-distance.syr.edu/contract.html>), the work of Knowles and others relative to andragogy has resulted in a desire to provide a mechanism for learners to build on past experience and determine needs. This mechanism is learning contract methodology. Hiemstra states,

Learning contracts provide a vehicle for making the planning of learning experiences a mutual undertaking between a learner and any helper, mentor, or teacher. By participating in the process of diagnosing personal needs, deriving objectives, identifying resources, choosing strategies, and evaluating accomplishments the learner develops a sense of ownership of (and commitment to) the plan.

Grow (1991) views learning contracts as a means for learners to share in the decision-making and monitor their own progress while the facilitator concentrates on communication, support and empowerment. Rather than being what Grow describes as dependent (or Stage 1) learners, Tough (2002) states that adults want to be in control by setting their own pace, using their own style of learning, and structuring it themselves.

The use of learning plans can also be tied to Maslow’s interpretation of human motivation described in his Hierarchy of Needs (Huitt, 2004). Maslow’s Hierarchy suggests that individuals must meet their deficiency needs (physiological, safety, belongingness, and esteem) before they are ready to act on their growth needs (cognitive, aesthetic, and self-

actualization). Franken (as cited in Huitt, 2004) suggests that it is appropriate to ask people what they want and how their needs could be met. Follow-up questions that probe deeper into what is keeping them from meeting those needs result in identifying the most important needs of each individual.

In summary, individualized learning plans provide a catalyst for dialogue between the learner and facilitator. Development of a learning plan begins with identification of the unique situation of the learner, including strengths, weaknesses, and aspirations. Learning activities are linked to valued outcomes, and achievement is documented and validated. Critical features of learning plans are that the learner is involved in its development and that it is regularly reviewed and updated. The importance of goal setting as part of the process of learning plan development is discussed in the next section.

Goal Setting and Motivation

Locke and Latham (1984) define a goal as the object or aim of an action. Goals provide direction for action and determine the amount or quality of work to be accomplished. Goal setting raises productivity, improves work quality, clarifies expectations, relieves boredom, increases satisfaction and performance, and contributes to self-confidence, pride in achievement, and willingness to accept future challenges (Locke & Latham). Tracy-Mumford (1994) states “goals give students motivation and direction.”

Locke and Latham (1984) find that participation in goal setting provides individuals with the confidence that the goals can be attained. Furthermore, Locke and Latham outline the following steps to obtain optimal results from goal setting:

- Specify the general objective or tasks to be done
- Specify how the performance in question will be measured

- Specify the standard or target to be reached
- Specify the time span involved
- Prioritize goals
- Rate goals as to difficulty and importance
- Determine coordination requirements (e.g., with other individuals)

These steps are similar to those outlined above that Knowles (1980) and others have included in the process of developing individualized learning plans.

However, “it is not self-evident how to set goals effectively” (Locke & Latham, 1984, p. 7). The skill of goal setting must be acquired. Learners require assistance to establish goals that are achievable, believable, measurable, and desirable. Goals should provide focus and continuing motivation. Also important are the identification of internal and external resources, preplanning to consider and remove potential obstacles to achievement, and arranging a goal review schedule. Helping learners to plan and set goals, become aware of personal strengths and abilities, and record their progress “allows learners to feel personal growth and learning are taking place” (Wlodkowski, 1985, p. 94).

Locke and Latham (1984) encourage individuals to set challenging goals that demand the maximum use of their skills and abilities. “Specific goals direct action more reliably than vague or general goals” (Locke & Latham, p. 20). As well, the more challenging the goal, the better the resulting performance; however, strategies for goal achievement must be “discovered through planning, problem-solving, and decision-making” (Locke & Latham, p. 25).

Goals, states Tinto (1985), are the intentions that provide reasons for learners to enter educational programs. The strength of commitment to goal attainment provides the

motivation to continue and can be described as the degree to which individuals are willing to put effort towards a particular goal as opposed to alternate opportunities. If identification of a goal and commitment to it is important to persistence, “adult students must make progress toward reaching that goal, and they must be able to measure that progress” (Comings, Parella, & Soricone, 1999, p. 9).

Goal-setting and goal progress are strategies Gibson (1998b) identifies as enhancers of academic self-concept, a factor in determining persistence or withdrawal. As Noel (1985) states, “students without specific goals cannot have the same drive that others, moving toward a goal, have” (p. 11). Furthermore, “when there is a disconnect between the learner’s goals and priorities and the level of commitment required to be successful in a program, a learner is apt to be dissatisfied and may quit the program” (Ludwig-Hardman & Dunlap, 2003). Dropping out may mean the abandonment of a goal which was previously assessed by the learner as having great importance in his life. “He is then often disappointed, frustrated and his feeling of his own value is impaired” (Peters, 1992, p. 236).

Moore (1986) identifies intent and planning as characteristics that distinguish learning in formal educational environments from other types of learning. He states that learning situations have a deliberate goal, and “if there is a goal there must also be, explicitly stated or implied, some criteria of its achievement, and in such planned, goal centred learning, there must be some strategy for reaching the goal” (p. 3). Furthermore, Moore suggests a system where “each learner builds a personal program aimed at his/her particular personal learning goal” (p. 10). He also points out that institutions do “nothing to help individuals in goal determination, or in finding resources other than courses” (p. 10).

Goals, states Schunk (2001a), “will promote performance only if persons are committed to attaining them” (p. 33), and higher goal commitment is the result of allowing individuals to set their own goals. Goals provide motivation, help people focus on the task, and guide the selection and application of appropriate strategies. Schunk (2001b) describes monitoring progress as an important aspect of motivation, stating

As people work on a task they compare their current performance with the goal. Self-evaluations of progress strengthen self-efficacy and sustain motivation. A perceived discrepancy between present performance and the goal may create dissatisfaction, which can enhance effort. Although dissatisfaction can lead to quitting, this will not happen if people believe they can succeed such as by changing their strategy or seeking assistance (p. 1).

Linskie (as cited in Madden, 1997) states that motivation leads students into learning experiences “which energizes and activates them, that keeps them focused on a specific task, and which helps fulfill their needs for immediate achievement and a sense of moving toward larger goals” (§ 3). Madden defines goal-setting as a level of achievement that students establish for themselves, whereas academic expectations are the level of achievement that must be attained in order to satisfy standards established by teachers. “Goal-setting is a target to aim for rather than a standard which must be reached” (§ 2). He suggests that the use of individual goal setting, accompanied by appropriate feedback and support, is an effective approach for motivating students.

Klauser (2000), in her observations of popular culture, emphasizes the need to formalize personal goals to increase commitment. She states, “writing it down says you believe that it’s attainable” (p. 19) and “write it down to be clear in your commitment to its

possibility” (p. 37). “Keeping track on paper changes the conversation in your own head. It helps you to pay attention, to embellish your ideas, and record your inspirations. It pushes you toward the possible” (p. 62).

In summary, goals provide direction for action, increase motivation, and are important for enhancing the persistence of adult learners in their programs of study. Learners, however, require assistance to establish achievable goals.

Individualized learning plans, and the interaction between learner and facilitator required for their development and ongoing maintenance, are one means of assisting learners to develop personal goals. The relevance of the research topics outlined above to the study that is the focus of this thesis is discussed in the next section.

Relevance of Literature to Current Study

Researchers (Brigham, 2001; Coldeway, 1982; Potter, 1998) inform us that there is a lack of research into support services in the online environment. Coldeway believes that there is a need for research into “the motivational structure of the correspondence student and discovering methods to reinforce motivation toward completion” (p. 30). If, as Locke and Latham (1984) inform us, a primary purpose of goal-setting is to increase the motivation level of the individual, and we accept that increased motivation and commitment results in a greater chance of persistence (Comings, Parella, & Soricone, 1999), it is reasonable to expect that goal-setting contributes to motivation and persistence of adult learners. This study investigates individualized learning plans as one mechanism that can be used to involve learners in setting personal goals.

Furthermore, Tinto’s (1975) concept of institutional integration as a significant factor in decisions to persist or withdraw leads educational providers to seek means of increasing

learners' perceptions of belonging. Brown (1996) views insufficient contact and support as barriers to integration and suggests that educational providers implement measures designed to reduce these barriers. This study investigates whether the intentional dialogue inherent in learning plan development improves learner perceptions of contact and support and thereby increases institutional integration.

Distance learners encompass a range of demographic and personal characteristics (Coldeway, 1986) which can affect their ability to be successful (Gibson, 1998a). Research (Brookover, Thomas & Paterson, 1982; Lim, 2000; Lyon, 1993; Mboya, 1989; Wlodkowski, 1985) has demonstrated that one of these characteristics, academic self-concept, is closely linked to academic achievement. This study investigates the influence of learning plan development on perceptions of self as a successful learner.

LaPadula (2003) points out that distance learners need to access support services in the same way they access instruction: from a distance. Although educational providers working with adult learners may develop written learning plans, if learners are studying at a distance, there is a need for development of an online learning plan tool with the following features:

- A means to assist learners think about goals, objectives, methods, timelines, and outcomes;
- A means to involve learners in making decisions about what will be learned, how it will be learned, and whether learning objectives have been met;
- A means to incorporate changes in personal attributes that are the result of the learning process;
- A means to promote ongoing dialogue between facilitator and learner;

- A means to recognize past experiences as a foundation for future learning;
- A means to provide learners with a sense of progress toward achievement of their goals; and
- A means to develop mutual trust between facilitator and learner; and
- A means to provide anytime, anywhere access.

The importance of learning plans and the dialogue required to create them is well documented in the literature. However, specific tools for developing learning plans are rare in the distance education environment. Tools such as the Skills and Knowledge Profile (ACETW), 1998), A Routemap for Your Personal Journey into Learning (Sauveur & Longworth, n.d.), and the self-assessment tools included in British Columbia's Prior Learning Assessment (<http://www.ola.bc.ca/pla/resources/tools.html>) are useful, but difficult to implement in a distance format for the purposes of information exchange between learner and facilitator.

The purpose of this research is to observe facilitators and learners using an online, interactive learning plan tool in a distance learning environment to determine its effectiveness in providing support and its contribution to learner motivation and the decision-making process when considering whether to continue or withdraw from a program of study. The focus is on how the learning plan can provide an environment supportive of what have been found in the literature to be the key elements in learner motivation and success: goal commitment, integration into the learning community, and a self-concept as a successful learner. The methodology used to carry out this investigation is described in the next chapter.

CHAPTER III

RESEARCH DESIGN

Introduction

This chapter begins with a discussion of methodology employed in this study. This is followed by a description of the participants, an overview of the online learning plan, and an outline of the procedures used to collect and analyze data.

Research Methodology

As Yin (1994) points out, the consideration of what type of research methodology to use must be based on the type of research questions being posed, the extent of investigator control over the behavioral events being observed, and the degree of focus on contemporary rather than historical events. Merriam (1998) states that qualitative research “helps us understand and explain the meaning of social phenomena with as little disruption of the natural setting as possible” (p. 5). Merriam describes case study design as a paradigm that is employed to gain an in-depth understanding of the situation under scrutiny as well as the meaning it has for those involved. “The interest is in process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation” (Merriam, p. 19). Yin states that case study research is appropriate when we wish to “describe an intervention and the real-life context in which it occurs,” or to “explore those situations in which the intervention being evaluated has no clear single set of outcomes” (p. 15). Creswell (1994) adds that in case study research a variety of data collection procedures during a sustained period of time is used to gather detailed information.

Case study design was chosen for this investigation to gather an in-depth understanding of the process of using the online learning plan and to gain insight from those involved in its implementation. The focus of the study is on the process of learning plan implementation, rather than on specific outcomes such as course completion. It examines the whole context in which learners and facilitators use the online learning plan rather than specific variables, and it seeks to discover rather than confirm existing theories. The main purpose of this case study is to identify how the implementation of the online learning plan was experienced by the learners and facilitators, in order to determine its potential effectiveness in providing support and contributing to learner motivation.

This case study is descriptive in that it presents a detailed account of the phenomenon under investigation. Merriam (1998) describes this as appropriate to provide basic “information about areas of education where little research has been conducted” (p. 38), or when practices are innovative, and the study may form the basis for future research. Yin (1994) calls this exploratory case study research that should include a description of what is being explored, the purpose of the exploration, and the criteria by which the exploration will be judged successful.

In case study research, data capture is achieved when “the researcher physically goes to the people, setting, site, or institution to observe or record behavior in its natural setting” (Creswell, p. 145). To achieve this, ease of access is one consideration when selecting cases for study (Stake, 1995), but the “opportunity to learn is of primary importance” (p. 6). A case is unlikely to be representative of other cases. It is chosen not because by studying it we can learn about other cases or about a general problem, “but because we need to learn about that particular case” (Stake, p. 3). “Data derive from participants’ perspectives, and researchers

attempt to understand the world from participants' frames of reference and the meaning people have constructed of their experiences" (Imel, Kerka, & Wonacott, 2002, p. 1). To accomplish this, the researcher becomes the instrument for data collection and analysis through observation, participation, and interviewing. This leads to reporting that is rich with quotations, narrations, and details. The process is flexible, and research designs can change to meet the needs of the situation. It is important that case study researchers "acknowledge and monitor their own biases and subjectivities and how these color interpretation of data" (Imel, Kerka, & Wonacott, p. 1).

Imel, Kerka, and Wonacott (2002, p. 2) state, "the quality of the research is paramount if the findings are to be credible and usable." Stake (1995) provides the following recommendations for improving validation of case study results:

- Include accounts of familiar matters so that readers can gauge the accuracy, completeness, and bias of reports of other matters;
- Provide adequate raw data so that readers can consider alternative interpretations;
- Use ordinary language to describe the methods of case research used;
- Make available information about the researcher and other sources of input;
- Provide reactions to the accounts from data sources and other prospective readers;
- Emphasize whether or not observations could have or could not have been seen rather than whether simple replication is possible.

These principles guided the process of carrying out this study, reporting the results, and drawing conclusions.

Procedures

This study investigates the development and use of an online learning plan tool (available at the time of writing at <http://www.ellen.bcelearner.ca>). Sample selection was purposive, that is, not random. This technique is appropriate when “the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned” (Merriam, 1998, p. 61). Cases were selected for study based primarily on convenience and ease of access, but also on the expectation that they would provide valuable insight into the phenomenon being investigated. Ideally, the facilitators participating in the study would have experience in using some form of learning plan with their students and are curious as to how this process can be accomplished at a distance. Observation, documentation, and interviews provided the primary sources of data collection. Direct observation was accomplished by physical presence with facilitator or learner participants during interaction sessions. Documentation in the form of stored learning plan data was collected to corroborate and augment evidence from observations and interviews. Interviews were conducted either face-to-face or by telephone.

Potential facilitator participants known or referred to the researcher were contacted and their written consent to participate was requested. Facilitators were asked to work with students on the initial development of individualized learning plans during the first two weeks of the new school year, in September 2003, and to review and update the learning plans throughout the term with data collection ending after three months on December 19. The workload at the beginning of September prevented facilitators from being ready to start working with the learners until the middle of the month. This shortened timeframe significantly reduced the amount of data available for analysis.

One facilitator received a face-to-face orientation session on use of the online learning plan on September 17, but she did not meet with a learner to begin developing a learning plan until October 20. I showed a preview version of the online learning plan to the second facilitator in a face-to-face session in July. He received additional orientation along with another possible facilitator participant on October 16. This was accomplished using telephone and Internet connections.

The original research design called for limited intervention by the researcher. Specifically, after orienting the facilitators to the learning plan, I would not participate in further interactions with the participants. However, it became apparent that the delayed start and lack of activity on the part of the facilitators was jeopardizing the study, and it became necessary for me to become more involved through direct interaction with the learner participants. Five of the six learners were oriented to the learning plan in a face-to-face setting either by me or by their facilitators. The exception did not receive an overview of the learning plan prior to meeting with her facilitator to begin entering responses.

I planned to use a variety of methods to observe the dialogue between facilitators and learners. These include usage logs, learning plan updates, and archived vClass¹ sessions. The web server administrator informed me that accurate usage logs would be difficult to obtain. In addition, neither of the facilitators chose to use vClass for interaction, so other than one opportunity for direct observation, I relied on interviews and the data available in the learning plans to provide evidence of facilitator-learner interaction.

¹ Elluminate's vClass (<http://www.elluminate.com>) is an application that provides full 2-way audio over the Internet, shared whiteboards, and shared desktop applications in a single intuitive, graphical interface. It enables physically distant users to simultaneously view and work collaboratively with a single web page.

The database containing all learning plan data was copied using file transfer protocol on a weekly basis throughout the research timeframe. I was also able to log in to individual learning plans at any time to view their contents. Semi-structured interviews with learners before they began using the learning plan and with both facilitators and learners after a period of usage provided information regarding their experience in the process of creating and using a learning plan.

Research Population

Several facilitators in online high school completion programs that welcome adult learners were approached regarding their willingness to participate in the study (see Appendix A). These individuals are known to me through membership in the BC Computer Curriculum Consortium, participation in New Directions in Distance Learning (BC), or personal contact with Chinook College (Alberta). Two signed consents were received. Soon after the first consent was received, an informal, face-to-face interview was conducted to determine the facilitator's experience and the nature of the educational program in which he works. This facilitator has nine years of experience working in self-directed learning environments with both teens and adults. A second facilitator participant has been an elementary school teacher for over 20 years, and was starting her second school year as a facilitator in a self-directed learning program that is located within a small, rural K-12 school.

Criteria for selection of the learner participants for this study are as follows:

- Over the age of 19.
- Returning to school after a minimum period of absence of 12 months from formal education.

- Enrolling for the first time in the facilitator's program of study.
- Access to computer technology and the Internet on a regular basis regardless of previous experience in its use.

A total of six learners between the two sites agreed to participate. Learner participants were required to provide informed consent (see Appendix B) prior to commencement of the research. The learners ranged in age from 19 to 40. All were female although this was not a criterion for inclusion. All were interviewed prior to beginning their usage of the online learning plan. These interviews provided the descriptions that follow.

Arlene (all names have been changed to protect the identity of participants) is 30 years old and lives with her husband and two elementary school aged children. She left school at the age of 17, feeling she had no choice as she lost her timetabled study block, then had to go to work full time when she moved out on her own. For the next six years, Arlene enrolled in courses "off and on," but had difficulty completing them especially those that required the writing of provincial examinations. Arlene has not been involved in any educational program for the past seven years, but she states three reasons for returning to school this year. First, she has always wanted to finish high school. Second, she would like to complete grade 12 before her oldest child (currently in grade 6). Finally, she does not want her children to view her own non-completion as an excuse not to finish themselves.

Kathy is excited to be back in school and has definite plans to continue her education after completing grade 12. One career she is interested in pursuing is Pharmacology Technician which demands several science and math courses as prerequisites for admission. She left high school 23 years ago at the age of 16. At that time, she was experiencing problems at home, primarily in getting along with her brothers and sisters and her single-

parent mother. After getting permission from the RCMP to live on her own, she got a job, and a person she describes as her “teacher and mentor” provided a room for \$100 a month. She enjoyed the freedom of being away from her family and got more involved with her peers. Having never been a great achiever in school, these circumstances led her to drop out of high school. She briefly returned to bible school three years later. Now she has four children (all boys, ages 17, 15, 7, and 5) and is married to a man older than she is who works away from home much of the time. She suffers from chronic health problems that sometimes affect her daily activities. Now that her youngest is in kindergarten, she feels she has “time to prepare to do something with my life.” Her husband and kids are supportive of her decision to return to school, although her boys tease her about setting high standards for herself and doing more than the minimum required in order to achieve high grades and other indicators of success. Since enrolling in her courses, she feels she has opened her mind to new things, such as history and politics, which were of little interest to her when she was in high school as a teenager. She gets satisfaction from the sense of accomplishment that this educational opportunity provides.

Like Ann, Justine left school about 10 years ago in her graduation year because she didn’t see school as being important at the time. She didn’t think it would lead anywhere as she couldn’t afford to go to post-secondary programs and figured “why bother.” Justine has returned to school now as she sees its value although she doesn’t have a specific career goal in mind. She currently lives with a long time boyfriend; they do not have any children. In a group setting, she is talkative and willingly admits needing help with her coursework, acknowledging that she is struggling with the concepts she should have learned in high school as a teenager.

Ruth is in her mid-30s and has been out of school for 16 years. While she participated in graduation ceremonies at that time, she was actually eight credits short of completing her diploma. Her interests were, and still are, primarily sports related. She had a difficult time in school, stating that she was told by her teachers that she “wasn’t smart enough” and she should “stick to horses” as something she was good at. There was no support at home to continue, so she didn’t return to pick up the final credits she needed. Now she has enrolled because “there are things I need to learn.” She is interested in writing and directing films and knows there is much to learn, freely admitting that she “could have learned this before.”

Carol is the youngest of the group. She is quiet and more tentative in the group setting, possibly a result of her age and only being enrolled in the program very recently while the others seemed to have more experience. She dropped out of high school a year ago after attending several schools, emphasizing that she was having difficulty with peers rather than with learning. Carol enrolled in this program because “it is almost impossible to get a job without your grade 12.” One of Carol’s goals is to attend college, and while she did not indicate interest in a specific program, she knows that furthering her education will enhance her chances of gaining the skills for “a career rather than a job.”

Lynne has also returned to school as she thinks there are more employment opportunities for those who have completed grade 12. She would like to earn more than minimum wage. Lynne is in her late twenties and has been out of school for about 15 years. She left because she didn’t find school all that interesting at the time, laughingly stating that “life was more interesting.”

Research Environment

The program in which the first facilitator currently works offers a wide range of secondary courses in a variety of delivery formats including print, multi-media, and computer managed. This program currently serves both teenagers and adult learners who are able to select courses that are appropriate for their grade level and learning style. The number of adults enrolled in the program has increased by 67% in the past year. Students carry out their studies in their homes under the direction of the professional program staff. Regular contact is maintained through phone, email, and face-to-face conferences. The facilitator is implementing the use of vClass to provide additional tutorial support. Some elective courses (e.g., Chemistry, Art, French, Spanish, Physical Education, Sewing & Textiles, Industrial Arts, and Music) are offered in a classroom setting, and students meet as they would in a traditional face-to-face environment at regularly scheduled times. School district policy offers students the option of challenging or demonstrating equivalency of prior learning in order to gain course credit.

All students enrolled in this program develop a brief, written student learning plan in consultation with an advisor. This plan identifies a proposed timeline for course completion, reasons for taking a particular course, enrollment in face-to-face elective courses, and proposed course challenges. There is also space to list courses being taken from other providers such as the local high school, regional distance education school, or local college. Adults are expected to complete the requirements for the BC Adult Graduation Program within a two year period, although this timeline is arbitrarily imposed by the program based on the uncertainty of continued funding for adult learners rather than on ministry or district policy. Optionally, adults may choose to complete the full 52 credit graduation program.

Because much of the curriculum offered by this program is technology-based, and because the program is committed to enhancing student-teacher communications through email and vClass, students are provided with a home computer and free Internet access as part of enrollment. Technical support is available from the program staff.

The second facilitator also works in a program offering a blended (i.e., site-based combined with distance) approach to provide service to both teen and adult learners, with facilitators available on site or by phone, fax or email to provide mentoring in a full range of secondary level courses, primarily delivered using the Nautikos eLearner² platform supported by print materials. In September 2003, 26 teen and adult learners were enrolled. Some adult learners do most of their course work at home, coming to the site at least once each week for assistance. Others work at the site on a daily basis after regular school hours. Like the first site, written learning plans are developed for each individual. These are reviewed periodically with notes and revisions recorded. These learning plans include objectives for course completion, educational and personal goals, attendance commitments, and space for progress review comments. A description of the expectations for behavior, attendance, and assignment completion is provided, and the learner's signature is an indication that these have been read and understood.

The Online Learning Plan

My experience in working with returning adult learners in a blended learning environment led to the development of the online learning plan that provides the focus for this research. The literature and this experience have shown that adults returning to a formal

² Nautikos eLearner (www.odysseylearn.com) is a course management system that delivers curriculum through local area networks or the Internet. It provides a flexible learning environment that can be individualized according to student needs.

learning environment arrive with varying personal attributes, some readily observable such as age and gender. Others, such as academic, social, and some physical attributes that are not observable, may be inconsistent with those identified with becoming a student. In addition, personal needs and goals that have provided the motivation to return to school are not directly observable. A means of discovering these hidden attributes has potential value to facilitators and learners, and previous research (Crichton & Kinsel, 2001; Crichton & Kinsel, 2002) suggests that individualized learning plans are a critical first step for returning learners and must be revisited over time as personal attributes change. This research suggests that learning plans provide an intentional link between the needs of the learner and the goals she views as important while providing the primary vehicle for interaction between the learner and facilitator. Crichton and Kinsel (2002) conclude that recognizing attributes that suggest at-risk learner traits and providing timely interventions can help individuals achieve success and continue their education. This research, plus several years of practice that included the use of a variety of informal and formal, written and unwritten learning plans, led to the development of a tool to formalize learning plans and make them accessible online.

Professor Norman Longworth, Napier University (Scotland), encouraged this development and offered a paper-based learning plan as an adaptable model (Sauveur & Longworth, n.d.). Additional research was conducted to find other learning plan models that included, among others, those offered by Knowles (1986), Gibson and Sherry (2001), the British Columbia Ministry of Education (www.bced.gov.bc/independentschools/is_education_programs/capp_student.pdf), University of Vermont (<http://www.uvm.edu/~uapvt/programs/stawid/vtmod/plans.html>), Empire State College (<http://empire1.esc.edu/coursespecial/epresources.nsf/web>), and the

California Department of Education (www.cde.ca.gov/challenge/toolkits.html). These provided a framework and a concept checklist of items to be included in an online learning plan. In addition, a preliminary review of the literature was carried out in 2002, covering the topics of self-concept, learner attributes, facilitator-learner interaction, and motivation.

After completion of the literature review, development was carried out using Net Objects Fusion v. 4, a web authoring application, to create the preview (non-functioning) learning plan tool. Two learners volunteered to assist with alpha testing this version. I acted as a participant observer as each of us assumed roles consistent with our typical daily interaction as facilitator and learner. The volunteer learners were told the following:

- I was only interested in their reactions to the tool, not their specific responses to the questions; and
- No responses would be saved or recorded in any way.

Reactions to the learning plan during this testing were favorable. One learner stated that it was a good way to start discussion between the facilitator and herself, and the other learner described her experience with the learning plans as “awesome” and was observed a few days later to be enthusiastically discussing it with her peers.

Modifications to the design were made as a result of the alpha testing, and final technical development was carried out in July-August, 2003. This included development of the backend Access database for data storage/retrieval and Active Server Page for controlling access to the learning plan. Once the technical development was complete, the learning plan was installed on a web server and tested to ensure its operability prior to the research described in this case study. A batch file was created to copy the stored learning plan data to an ftp site so it could be accessed independently of the live data for research purposes.

The online learning plan tool (available at the time of writing at www.ellen.bcelearner.ca) is a hyperlinked document that is stored on a web server in Nakusp, BC, owned and maintained by School District #10. Access to the learning plan files is controlled by Windows Active Server Page technology (see Figure B1). Each learner selects a login ID and password which both she and her facilitator use to access her personal learning plan. Every page that has user-changeable information has a Save button that must be clicked in order to update the stored learning plan. Sessions automatically timeout after 20 minutes of inactivity. Users are reminded of this each time they log in. Data are stored in an Access database and are retrievable by the learner or facilitator at any time. The date and time of the last update are displayed as a reminder that changes made during the current session have not been saved and to indicate the length of time since the learning plan was accessed.

The Home Page (see Figure B2) introduces the online learning plan and emphasizes that it belongs to the individual learner. Ownership of the learning plan encourages self-esteem, responsibility, creativity, and self-fulfillment, conditions that Knowles (1986) views as contributing to an environment conducive for learning. Ball (1994) states “Since success in learning depends critically on motivation and confidence, it obviously makes sense to involve the learner in deciding what is to be learned at each stage” (p.7). Knowles (1986) agrees, saying

People tend to feel committed to a decision or activity in proportion to the extent that they feel they have participated in making the decision or planning the activity. The reverse is even more true: People tend to feel uncommitted to

a decision or activity in proportion to the extent that they feel the decision or activity is being imposed on them by others. (p. 46)

Learners are reminded that the learning plan is a working document that will be revised as they progress through their program of study. It will serve as what Hiemstra and Sisco (1990) describe as “a tool for communicating learning intentions between the learner and instructor” (p. 106) that is “flexible enough so that new insights or revelations may be easily incorporated into the learning mix” (p. 113).

The Home Page provides a gateway to the other components of the online learning plan described below. These components are hyperlinked and are not intended to be accessed in any particular linear sequence. The tools listed on the left (“Learn more . . .”, “My Journal”, and “Action Plan”) are available at all times with the intention that information gained from exploring learning, careers, or goal setting can be transferred to an action plan for the next six months, year, or longer timeframe. The Action Plan (see Figure B3) can include objectives as straightforward as “get my driver’s license” to more complex goals such as “be more patient with my children.” The Action Plan provides space for identifying where the learning will take place, who will provide assistance, and planned start and end dates. An important part of the plan is determining how the individual will assess whether each objective has been achieved. As stated by Knowles (1980, p. 234), “the important thing is that the objective have meaning to the learners and provide them with directional guidance in their learning.” As with all parts of the online learning plan, the Action Plan can be updated and revised as frequently as desired by the learner.

The personal Journal (see Figure B4) can be used to record reflections or questions about what the learner has discovered about themselves as well as course content. There is

space for text dialogue between the learner and facilitator that can be conducted either synchronously or asynchronously. Brown (2001) states that “supportive interaction has been shown to be an important factor in community” (¶ 18) which in turn “can affect student satisfaction, retention, and learning” (¶ 2). Hiemstra (1985) recognizes that the mutual trust developed as a result of interaction between learner and facilitator is critical and that time and effort for reflection and discussion must be legitimized. Tinto (1975) and Pascarella (1980) emphasize that this contact is most important for students whose initial characteristics and subsequent learning experiences typify the “withdrawal-prone” individual.

The Learn More (see Figure B5) tool provides links to information on external Internet sites such as listings of post-secondary educational opportunities or careers in Canada. These are provided because “distance learners require information about the opportunities available throughout the entire postsecondary system” (McInnis-Rankin & Brindley, 1986, p. 62). There are also links to quizzes, some of which are just for fun (for example, “What Kind of Dog Are You?”), and others (for example, Learning Style 1 and 2) are useful adjuncts to the learning, career, and goal setting explorations. Learners may choose to record results from these quizzes in their journals as an avenue for self-reflection and/or discussion with the facilitator.

The demographic information contained on the “Who Am I?” page (see Figure B6) provides the facilitator with insight into some of the variables that arise from the learner’s current life situation that may influence her ability to participate in various educational opportunities (Cross, 1981). Rekkedal (1982) concludes that situational factors cause more distance students to withdraw than problems with the method of course delivery itself, and Gibson (as cited in Lim, 2000) recommends that educators need to better understand their

learners in context. The descriptors on the “Who Am I?” page provide an opportunity for the learner to reflect on personal qualities and offer a concept of self that may be linked to what Bandura (as cited in Sweet, 1986, and Lim, 2000) calls self-efficacy: the beliefs in one’s own capabilities to organize and execute a course of action and to control events that affect one’s own life.

A potential negative effect of using descriptors is learners who feel that they do not possess these qualities but associate these qualities with academic success may be less motivated because they anticipate undesirable outcomes (Schunk, as cited in Lim, 2000). “How learners see themselves, as successful or unsuccessful learners, has bearing on whether they, in fact, will be successful or unsuccessful,” state Wiseman and Hunt (2001, p. 45). Furthermore, these authors feel that “Knowing how students see themselves will help their teachers be more successful in motivating them to higher levels” (p. 45).

Another concern with self-reporting of personality variables, caution Shavelson, Hubner and Stanton (1976), is that responses may be selected because they are known to be socially desirable or learners may be unwilling to report their “private” self-concepts. Hiemstra (1985) also points out that self-observation may be affected by a lack of understanding.

The Learning section of the online learning plan includes questions related to Past Learning Experiences (See Figure B7) and Future Learning Opportunities (see Figure B8). Some of the responses related to previous learning experiences provide indicators of the potential for persistence. For example, Rekkedal (1982) finds a correlation between the level of previous educational attainment (positive) and the length of time out of school (negative) with continuation. Other questions are designed to encourage learners to consider that

learning is not limited to the school environment, and that they most likely have participated in learning that is related to work, hobbies, or personal accomplishment.

The Future Learning Opportunities page encourages the learner to examine her opinions about learning, explore the reasons why she has enrolled, and examine some of the variables that influence her ability to participate (time, place, support, etc.). By recognizing the interplay between the learning situation and the individual, the learner and facilitator can work together to develop appropriate strategies and support resources (Hiemstra, 1985).

Whether currently employed or not, the Career and Employment Information page (see Figure B9) encourages the learner to see a relationship between work and learning. This section of the learning plan contributes to the recognition that learning can take place outside the traditional school environment and that all work involves the learning of skills whether or not these are formally acknowledged. Required training or upgrading may be a significant factor for learners when they are developing their education and career plans.

The Setting Goals section (see Figure B10) of the learning plan can be viewed as a means of increasing learner motivation. Lim (2000, p. 42) states, “When a student sets goals, the goal commitment may be enhanced.” Wiseman & Hunt (2001) differentiate between performance goals and learning goals. Performance goals emphasize demonstration of high ability and avoidance of failure while learning goals emphasize the challenge of learning and the mastery of a task. The point of a learning goal is to improve and learn no matter how many mistakes are made along the way, and “The teacher’s primary responsibility is to get students to learn, not perform” (Wiseman & Hunt, p. 47). As mentioned above, the learner can use the Action Plan tool to transform learning goals into a roadmap for the future.

Tough (as cited in Cross, 1981) reports that one of the most frequently cited reasons to continue in a learning project is the feeling of being a successful learner, and Wiseman and Hunt (2001) suggest that “students’ beliefs about their abilities to be successful also have impact on their engaging or not engaging in learning tasks and their levels of persistence to stay with them once engaged” (p. 47). The Celebrate Success page (see Figure B11) of the learning plan provides a forum for acknowledging learner success however they define it for themselves.

In addition to the learning plan itself, three other documents were distributed to participants. A Communications Record (see Appendix C) was given to facilitators, and they were asked to record all interactions that were not specifically related to the learning plan such as requests for assistance with course content. Neither of the facilitators returned this document. Facilitators were also given instructions on how to get started with the online learning plan (see Appendix D). A document titled Suggestions for Working on Your Learning Plan (see Appendix E) was available for all participants, although it may have only reached the hands of the learners who were oriented to the learning plan by me. This document was developed following my observation of the initial reaction between one facilitator-learner pair who appeared to have difficulty understanding how to approach the learning plan. Copies of the document were given to four learners during the group orientation that I conducted, and I left copies with the facilitator for the remaining participant and any other learners with whom he wanted to use the learning plan. Since this participant never accessed the online learning plan after her orientation session with this facilitator, claiming that she did not have the correct web site address, either she never received the list of suggestions or she misplaced it.

Data Collection

I conducted semi-structured interviews by telephone or in person with all participating learners before they were introduced to the online learning plan tool. These were not electronically recorded, but I kept detailed field notes and followed up with individuals to confirm interpretation of their responses. The same schedule of questions was asked of each learner; however, spontaneous questions and comments also arose during the interviews. The initial interview posed the following questions:

- How long has it been since you were last enrolled in school?
- Why did you leave school at that time?
- Why did you decide to return to school now?

At the end of the research period, interviews with the learners focused on the usage of the online learning plan tool and the interactions with the facilitator. Questions were designed to elicit the learner's feelings about using the learning plan (see Appendix F). These interviews were conducted between January 2-9, 2004, either in person or by telephone.

I interviewed the facilitators in person during this same week. They were asked similar questions (see Appendix G); however, they were also asked for their observations of the learner's use of the learning plan tool. For example, where the learner was asked "How do you feel about sharing information with your facilitator?" the facilitator was asked "How comfortable do you think the learner was in sharing personal information with you?"

One facilitator and learner were also interviewed one month after their initial face-to-face meeting to start work on the learning plan. These interviews were carried out after observation of this interaction led to concerns regarding future participation in the study.

Field notes from all interviews were transcribed. Each participant was given the opportunity to reflect on and respond to my interpretation of what was said. Participants were also invited to add further comments although no one did.

Snapshots of the data stored in the online learning plan database were collected on a weekly basis throughout the school term. These were dated and maintained as separate records in order to track changes over the duration of the research. Entries made to the My Journal section were exported to a text file to be used for analysis. Participant confidentiality was maintained throughout the study and in reporting of findings. Other than the learners and facilitators, the actual responses contained in the learning plans are accessible only by me and the server administrator. I focused on analyzing the process of using the learning plan rather than any specific responses entered by individual learners except for entries used to corroborate interview responses.

I received emails regarding two issues related to the technology. One learner had difficulty saving text entered in the Journal and Action Plan sections, and another learner had difficulty logging in.

Neither facilitator used vClass for collaborative, synchronous interaction so no archives were available for later review. These archives would have provided verbatim records of interactions, including specific dates and times they occurred, between facilitators and learners related to the development and maintenance of the learning plans.

Analysis of the Data

Content analysis is the primary technique utilized for data analysis in this study. “The process involves the simultaneous coding of raw data and the construction of categories that capture relevant characteristics” of the data being analyzed (Merriam, 1998, p. 160). It was

expected that by using this method, themes and recurring patterns of meaning would become evident.

Category construction resulted in a series of codes that reflect the purpose of the research. Merriam (1998) suggests that these categories should be exhaustive (i.e., all important data can be categorized), mutually exclusive (i.e., a unit of data fits in only one category), sensitive to what is included in the data, and indicative of congruency in the level of abstraction. Transcribed interview notes were first examined, and comments clustered according to the topic areas found in the literature to be relevant to this research: nature of adult learners, motivation and persistence, learner support, learner-facilitator interaction, and goal setting. A second examination resulted in clustering around goal commitment and self-concept. Third, the participants' assessment of the learning plan were clustered around three categories: learning plan design, usage, and effectiveness. Once the data clusters were identified, qualitative analysis of the interview transcriptions, journal comments from the learning plans, and incidental private emails between the participants and myself was carried out through a manual system of coding content using tables in Microsoft Word. Samples of coded data are included in Appendix H. Had the volume of data available for analysis been larger, a tool such as Atlas.ti would have been used.

Data Validity and Reliability

Some strategies employed to enhance the internal validity of the findings in case study research are triangulation (use of a variety of data collection techniques for comparison), member checks (asking the participants if the data and tentative interpretations are plausible), and clearly identifying any biases that the investigator may bring to the research. I compared actual learning plan data and interviews to find corroborating data. Participants were offered

the opportunity to reflect on the interview transcriptions. Investigator bias is addressed in reporting the results.

While it is difficult to determine the reliability of qualitative research because there may not be any benchmarks that can be used for comparison in replications of the study, I looked for consistency and dependability. That is, are the results consistent within the data and do they make sense.

A discussion of the implications of this research design and suggestions for a longer term study with a larger group of facilitators and learners are included in Chapter V.

Summary

Using a descriptive case study, two facilitators and six female adult learners were observed as they used an online learning plan tool for one semester. The learners in this study had returned to high school completion programs after an absence from formal education of at least one year. They enrolled in educational programs that enable them to complete their learning activities at home with access to a facilitator for assistance and guidance.

Observation, documentation, and interviews provided information on facilitator-learner interactions in order to assess the effectiveness of the learning plan in supporting distance learners, providing motivation, and influencing decisions regarding persistence and withdrawal. Content analysis resulted in the construction of coding categories related to themes found in the literature, including the nature of adult learners, motivation and persistence, learner support, learner-facilitator interaction, and goal setting. A second analysis coded for evidence of factors arising from the literature that are primary contributors to motivation and persistence: goal commitment and self-concept. Because a focus of this research was the investigation of the design of the learning plan itself, a third data analysis

resulted in codes related to learning plan design, usage, and effectiveness. The results of this analysis are presented in the next chapter.

CHAPTER IV

RESULTS AND DISCUSSION

Introduction

This chapter begins with a review of the purpose of this study and a description of the data available for analysis. Results are then viewed from three different perspectives. First, results are presented from field notes, observations and interviews related to the participants in the study. Second, the results are discussed according to the themes found in the literature: nature of adult learners, self-concept, motivation and persistence, learner support, learner-facilitator interaction, and goal setting. Responses to the research questions provide the final lens through which the results are viewed.

Purpose of the Study

This case study explored the use of an interactive, online learning plan tool by facilitators and adult students to explore their experience with this method of support in motivating learners and assisting them in making decisions related to persistence or withdrawal in distance education programs.

Data Available for Analysis

The original research design called for data collection to be carried out for 16 weeks commencing at the start of the new school year on September 2, 2003, and ending with the last day before the winter break, December 19, 2003. This timeframe was chosen because learners must be enrolled prior to September 30 of each year in order to be funded by the BC Ministry of Education, learning plan development is generally initiated as part of the intake process, a four month period was anticipated to be long enough to make observations, and

experience has shown that adult learners sometimes do not return to their course work immediately after the winter holidays, so extending the research period would not add significantly to the data collection.

Unfortunately, the research was delayed due to facilitators being busy with start up of a new school year and being unprepared to begin working with potential learner participants on developing a comprehensive learning plan in an unfamiliar format. One facilitator and learner initiated work with the learning plan in mid-October after the facilitator was reminded that several weeks of the time period allocated for the investigation had elapsed. By the end of October the other facilitator was still finding learners to recommend for participation. On November 10, I traveled to his learning centre to meet with his learner group, conduct initial interviews, orient them to the learning plan, and encourage them to begin using it. These delays resulted in a limited amount of usage of the learning plan; however, as originally planned, usage was documented by copying the learning plan database file on a weekly basis in order to track changes over time.

Initial interviews were conducted with all six members of the learner group, three by telephone and three face-to-face. During the research term, one learner withdrew from her educational program without leaving forwarding information, and another got a job that kept her away from home and unavailable by phone or email. Final learner interviews were therefore only carried out with the remaining four members of the group, three face-to-face and one by phone. Facilitator interviews were conducted face-to-face. None of these interviews were recorded, but handwritten notes were taken.

I maintained a journal of activities, thoughts and reflections throughout the research process. This journal and email communications with the participants also were used in reporting the results discussed below.

Observation of the Case Participants

When I first interviewed Arlene in mid-September, she was clearly focused on her goal of high school graduation. She appeared confident and motivated, in spite of several previous attempts to complete courses unsuccessfully. In her final interview, she stated that she found the online learning plan easy to use; however, there is no evidence that she ever visited the site after the initial file creation. Her facilitator describes her as having good intentions to work toward graduation, but not following through, an observation that is supported by the lack of submitted assignments throughout the term. The gap between what Arlene said had been done and the evidence could be due to two factors. The first could be a reluctance to admit (possibly even to herself) that she is not progressing toward her goals, and she may be what Simpson (2000) describes as a success-resistant student “for whom success was more threatening than failure because at least failure didn’t involve uncomfortable and difficult changes in his life” (p. 155). The second factor could be a desire to provide acceptable or desirable responses to please the researcher. Although Arlene said she will continue with her English course (a requirement for graduation) even though she doesn’t like the assignments, during the final interview she decided to enrol in a bookkeeping course and completed the first two lessons within three weeks. This is consistent with Conrad’s (2002) view that adults are motivated to learn by a need to see relevance in their learning. Arlene doesn’t feel she needs to do all of the writing required in her English course, but she sees the value of learning a practical skill like bookkeeping.

Kathy has returned to formal schooling after the longest period of time of any member of the group. She is faced with many challenges including health problems and the responsibility of raising her four children and maintaining her home while her husband is working out of town. In her interviews and email correspondence, she was cheerful and talkative. When I first interviewed her, she was extremely motivated to achieve her goal of graduation within two years. She had taken on a fairly heavy course load, but was enthusiastically approaching the challenge. When asked in her final interview, she said that she had considered withdrawing from the chemistry course that was very difficult for her, but stayed with it “because the teacher is awesome.” Her journal entries indicate her struggles to juggle all of the things she wants to accomplish in a day, with many comments like “I never got done what I wanted to get done.” During her final interview, she expressed concern regarding the two year time limit her program has established for adult graduation. The potential may exist for this arbitrary institutional time requirement to lead to feelings that finishing within this period of time is impossible, a factor identified by Pappas and Loring (1985) as contributing to decisions to withdraw.

Justine, too, is concerned about the time restrictions, but states she isn't doing any work because no one has told her what to do. This could be the result of expectations that any educational program will be similar to the passive, instructor-led model that she experienced when in high school. This is consistent with Knowles, Holton and Swanson's (1998) suggestion that adults entering educational programs return to earlier conditioning in previous school situations. It appears that Justine is still making the transition to independent, self-directed learning that is required as an adult learner in a distance learning environment.

As Ludwig-Hardman and Dunlap (2003) state, adult learners may need to be coached in the skills required.

Justine also expressed frustration that the staff at the learning centre didn't seem to understand her needs, particularly the fact that she lives out of town and finds it difficult to come to the centre even for occasional visits. I observed an interaction between Justine and one of the facilitators when she met me at the centre for her final interview. She wanted to take advantage of the opportunity of being physically on campus to meet with the facilitators to discuss her progress. Instead of welcoming her and recognizing a rare opportunity to meet face-to-face, the site administrator said, "Sorry, I have to go for lunch now," and abruptly left the building. Justine's dissatisfaction is consistent with Garland's (1993) findings that students who have no difficulty with subject matter competence find that the affective characteristics of the facilitators are problematic. As Ryan (2001) states, "Distance learners have different needs from their on-campus colleagues and this difference must be recognised and accommodated" (p. 75).

An unexpected outcome comes from learning plan files and interviews that indicate that learners who received orientation to the learning plan by the researcher were more likely to access it and explore the prompts in multiple sections of the learning plan.

Table 1 lists the type of orientation to the online learning plan provided for each of the learners and subsequent use of the learning plan.

Table 1. Orientation to the online learning plan

<i>Learner</i>	<i>Orientation to Learning Plan</i>	<i>Learning Plan Usage</i>
Arlene	None	None
Kathy	F2F by researcher	High
Ruth	F2F by researcher	Medium
Justine	F2F by researcher	High
Carol	F2F by researcher	Low
Lynne	F2F by facilitator	None

Learning plan usage is rated as none (no data entered beyond demographic information and/or no evidence of file access after initial creation), low (data entered in one or two different sections in addition to demographic information and/or evidence of file access at least one time in addition to initial creation), medium (data entered in three or four sections and/or evidence of file access at least two times in addition to initial creation), high (data entered in more than four sections and/or evidence of file access three or more times in addition to initial creation). One of the facilitators observed that the researcher “made it more comfortable for the learners because of her familiarity with the learning plan.” Further research is required to determine the influence that past experience of the facilitators in working with adult learners, collaborating on the development of learning plans, and using this specific online learning plan has on the learners’ subsequent use of the tool.

Results by Literature Theme

Before conclusions can be drawn regarding the use of the online learning plan as an effective tool, the results must be situated within the themes found in the literature to determine whether or not this small case study is representative of adult learners working in distance learning environments. The themes explored include: nature of adult learners, self-concept, motivation and persistence, learner support, learner-facilitator interaction, and goal setting.

Nature of Adult Learners

Within the theme of the nature of adult learners, the findings of this research suggest that learners who participated in this study have similar experiences and circumstances to adult learners described in the literature. Six female adult learners aged 19 to 40 returned to high school completion programs after an absence from formal education of at least one year. All have re-entered school voluntarily, bringing with them diverse educational backgrounds and social contexts. When asked in their initial interviews why they had not completed high school previously, their reasons included having to drop out in order to go to work; not seeing education as being important, relevant or interesting; and not getting along with family or peers. None of the learners reported that academic ability was a factor in their earlier withdrawal. This is consistent with Cross's (1981) findings that family responsibilities/issues or a lack of clarity of educational goals are the most common reasons given for not completing education programs previously.

The findings of this research suggest that this group of learners, like other adult learners studied in the literature, struggle with competing obligations and a lack of time. As shown in Table 2, four of the learner group are living with partners, three have children, and two are currently employed.

Table 2. Demographic attributes of learner group

	<i>Living with a Partner</i>	<i>Children</i>	<i>Age of Youngest Child</i>	<i>Employed</i>
Arlene	Y	Y	10	Y
Carol	Y	N		N
Kathy	Y	Y	5	N
Justine	Y	N		N
Ruth	N	Y	11	N
Lynne	?	Y	?	Y

Learners reported that “so many things get in the way” of doing school work, and “time leveraging is the hardest task of an adult student.” One learner is also faced with health issues that prevent her from working on her courses as much as she would like, but she also admits to succumbing to distractions and being a procrastinator. Her online learning plan journal is filled with almost daily comments that indicate good intentions of completing assignments, but, as she states, “there is always something that needs to get done” for her family or community. It appears that these learners are similar to those described in the literature (Garland, 1993; Kerka, 1995; Li, Lee, & Kember, 2000; Mahoney, 1991; Mangano & Corrado, 1991; Peters, 1992) who fill multiple roles and for whom the student role is secondary to their roles of spouse, parent, employee, or community member.

The reasons given by this group of learners for returning to school this year were also consistent with those found in the literature. These learners expressed both external and internal motivations for enrolling this year after periods of time since their withdrawal from high school ranging from one year to more than 20 years. “I want a career not a job,” and

“It’s almost impossible to get a job without your Grade 12” were typical comments. One learner stated, “I have always wanted to graduate,” and another says that after twenty years of raising a family “it’s time to prepare to do something with my life, and I need a sense of accomplishment.” Another matter-of-factly asserted, “There are things I need to learn.” These comments are consistent with previous research findings that adults are ready to learn when there is a need to know something, often in response to external motivators (better jobs, promotions, higher salaries), but also because of internal pressures such as the desire for increased satisfaction, self-esteem, and quality of life (Knowles, Holton, & Swanson, 1998).

Self-concept

Another theme arising from the literature is the link between self-concept and success in educational activities. This study suggests that reflected appraisal (the perception of how she is seen by significant others) and how an individual sees herself contribute to self-concept. One learner reported that teachers in high school told her there wasn’t any point in continuing as she wasn’t smart enough. In her learning plan, this individual described herself as being very ambitious and determined, but not at all intelligent, although she stated, “I know what I know . . . and that works for me” and “I know I could have learned this before.” Others mentioned that the support of family and friends contributes to their motivation, but one expressed feelings of frustration when those closest to her ask, “How is it going?” if she isn’t progressing in her studies. When reflecting on the lack of progress of a learner, one facilitator stated, “She doesn’t see herself as a successful learner.” The learner herself admits that she has made several attempts at returning to school, but she always quits before the final exams. The past and present experiences reported by these learners are consistent with

other research (Lim, 2000; Wiseman & Hunt, 2001) that concludes that academic self-concept is closely linked to academic achievement.

Motivation and Persistence

Within the theme of motivation and persistence, the learners participating in this study identified motivating factors similar to those found in the literature. They reported both internal and external motivators. Two learners expressed strong internal motivation with comments such as “I want to get it done” and “I need to learn things.” Another learner who hadn’t done much in her courses “because no one has asked me to” blamed the school for her feelings of frustration and uncertainty. This is consistent with what Gibson (1996) describes as “variability among students in their willingness to assume control” (p. 32).

All learners were asked if they had considered withdrawing during the term. Three reported that they had considered withdrawing. Two gave reasons related to course content with one resisting the writing requirements for English assignments, and the other struggling with difficult concepts in Chemistry. One of them stated, “There are lots of excuses not to complete.” Only one learner reported that she had not considered withdrawing during the term. As the literature informs us, there is never a simple answer to the complex question of who persists and who withdraws (Kerka, 1995; Noel, 1985; Tinto, 1985), but the learners in this study credit the support and encouragement of family and teachers as being important in their decisions to continue.

One learner expressed a great deal of frustration arising from poor communication with the staff working in her educational program. She states, “I know they are busy, but so am I.” As a result, this learner described her commitment “on a scale of 1 to 10, it is about 7, but going down steadily.” She is considering transferring to an alternate educational provider

such as the local college or regional distance education school. This behaviour is consistent with Sewart's (1993) comparison of educational institutions to other service providers. That is, when the clients (students) receive a good impression of the service being provided, they are satisfied and will stay in the program. If they are dissatisfied, they will consider withdrawing or transferring.

Of the original group of learners participating in this study, one dropped out without informing the facilitator, leaving behind textbooks and a loaned computer belonging to the school when she moved to another province. No final interview was conducted with this learner, so her reasons for withdrawing remain a mystery. Her abrupt departure is an example of Roberts' (1984) finding that a large proportion of students prefer to drop out without communicating the reasons or indicating the type of problems they are experiencing.

Learner Support

The findings of this research are consistent with the literature related to the theme of learner support in distance education environments. One learner stated that she receives good support from friends and family, and especially from her spouse. Nevertheless, she is expecting support from the staff at her school as well. She stated in her interview, "I want to do everything, but I need help!" and she especially feels a need to receive constant assurance that she is "on the right track." This is consistent with Ludwig-Hardman and Dunlap's (2003) suggestion that students who do not attend formal classes for instruction often "report feelings of isolation, lack of self-direction and management, and eventual decrease in motivation levels."

When four learners arrived to receive orientation to the learning plan, they met each other for the first time. They took advantage of the opportunity to organize a weekly study

session at their learning centre. Each one acknowledged her feelings of relief that she was not the only one struggling on her own with course content. Recognizing an opportunity to provide support to these learners, the facilitator enthusiastically encouraged them and offered to reserve the time so he would be available to provide whatever assistance was necessary. His participation in the learner driven study sessions is consistent with Tait's (2003) identification of the necessity for student support in three areas: cognitive (the learners were primarily seeking assistance with course content), affective (the learners would also be able to receive social support and see themselves as part of a group whose members have similar goals), and systemic (the facilitator would be available to interpret institutional rules and regulations such as graduation requirements).

In addition to face-to-face meetings, this research suggests there is a growing interest in the use of technology to provide delivery of services to distant learners. One facilitator was excited by the prospect of using vClass to communicate with learners in addition to phone, fax, and email that were already being utilized. This conforms to Tait's (2000) argument that information communication technology presents opportunities to rethink student support with regard to time and place.

Learner-Facilitator Interaction

The importance of learner-facilitator interaction is another theme arising from the literature that is highlighted in the findings of this research. One learner described the opportunities for interaction with the facilitator as being beneficial in providing motivation. Although learners were not asked to comment specifically on the quantity or quality of interaction with the facilitator, some offered comments such as "more interaction and involvement would be beneficial" and "facilitator responses provided encouragement." One

learner expressed disappointment with the lack of response from the facilitator, which made her feel she was “missing the whole key idea of using the learning plan,” and she did not make further entries in her journal. The facilitators acknowledged that the learning plan is a “valuable missing piece for contact with students,” which Rumble (2000) points out is especially beneficial when it occurs early in the first year of study, and Riffée (2003) suggests can overcome even the thinnest ties between distance students and the educational provider.

One learner, on the other hand, was reluctant to interact with her facilitator and didn't feel that it was necessary. In my observation of their initial face-to-face meeting to commence development of her learning plan, I noted that the learner appeared agitated and in a rush after arriving 45 minutes late for the scheduled appointment. When presented with the adjective descriptors on the Who Am I? page of the online learning plan, the learner said, “Do I have to do this?” and left shortly thereafter without completing more than the demographic information. In subsequent interviews, this learner expressed surprise at the amount of information requested in the learning plan and stated that she didn't see a need to use it or to share personal information with the facilitator, although she reported that interacting with the facilitator was “no problem.” The facilitator, on the other hand, described this learner as “resistant” and “secretive” during their initial interaction, expressing frustration that as the facilitator she wasn't better prepared to overcome the resistance she encountered from the learner. This made the facilitator feel uncomfortable and unable to make a personal connection with the learner. This is consistent with Moore's (1989) observation that interaction has to happen when students want it and it must match their needs.

Goal Setting and Persistence

The importance of setting personal goals is the final theme from the literature used for analysis of the research data. All six learners either stated specifically in interviews or in the learning plan that they are goal-oriented individuals, or they mentioned particular goals that led them to enrol in their current program of study. They recognize the advantages of completing high school primarily as it translates into increased economic opportunity. One spoke of wanting to finish high school before her kids could use her non-completion as an excuse to drop out themselves. Another learner admitted to a pattern of setting high goals and then experiencing a sense of failure when these goals were not attained because achieving success is important to her. These findings are consistent with Locke and Latham's (1984) observation that motivation can be increased by goal-setting, but it can lead to "precisely the opposite effect if it produces a yardstick that constantly makes the individual feel inadequate" (p. 39). Furthermore, Locke and Latham remind us "Nothing breeds success like success. Conversely, nothing causes feelings of despair like perpetual failure" (p. 39).

Further evidence of consistency with the theme of goal setting from the literature is the value these learners attribute to the use of the learning plan as a motivator. One learner described the learning plan as a tool to keep her moving in the right direction when it is so easy to get distracted, and two others saw its usefulness for developing a long range educational plan. One eloquently stated that, "It is one thing to have goals in your mind, but another to have them on paper and see them in black and white." This is consistent with Eisner's (1998) view that "Nothing is so slippery as thought; here one moment, gone the next" (p. 17), and Klauser (2000), who states, "The first step of commitment is to be willing to write down what you want" (p. 148). Having her thoughts in print allowed this learner the

opportunity to reflect and revise her goals to be more realistic. She stated this will help her to gain a sense of achievement, leading to further success because a “sense of accomplishment is like an addiction.” This echoes Michael and Smith (1976), who comment, “Frequent success leads to further success,” and Cross (1981, p. 55) who adds, “learning is addictive; the more education people have, the more they want, and the more they will get.”

Discussion of Research Questions

The original twelve research questions were refined for analysis and discussion as shown in Table 3. Each of these questions is discussed using evidence from the research.

Table 3. Research questions

<i>Original Questions</i>	<i>Questions for Analysis and Discussion</i>
1. How do students make decisions related to continuation in a course or program of study?	1. How do students make decisions related to continuation in a course or program of study?
2. How does interaction with the facilitator influence decisions related to continuation or withdrawal?	2. Does interaction with the facilitator influence motivation?
3. How does the use of an online learning plan affect decisions related to continuation in a course or program of study?	3. Does the use of an online learning plan affect decisions related to continuation in a course or program of study?
4. How does use of this learning plan influence learners' perceptions of interaction?	4. Does use of this learning plan influence learners' perceptions of interaction and support?
5. How does use of this learning plan influence learners' perceptions of support?	[included in Question 4]
6. How useful is the learning plan as a tool for interaction between facilitators and learners in a distance learning environment?	5. Is the learning plan useful as a tool for interaction between facilitators and learners in a distance learning environment?
7. How does use of the learning plan affect facilitator perceptions of their rapport with learners?	[included in Question 5]
8. How useful is the learning plan as a tool for identifying learner characteristics commonly associated with either persistence or withdrawal?	[removed because focus of this study was on the process of using the learning plan, but will be relevant in future investigations]
9. To what extent do facilitators use the online learning plan to communicate with learners in the distance education environment?	6. Do facilitators and learners use the online learning plan to communicate in the distance education environment?
10. To what extent do learners use the online learning plan to communicate with facilitators in the distance education environment?	[included in Question 6]
11. What components of the learning plan do facilitators and learners find the most useful?	7. What components of the learning plan do facilitators and learners find the most useful?
12. What components of the learning plan do facilitators and learners find the least useful?	[included in Question 7]

How do students make decisions related to continuation in a course or program of study?

The results of this research suggest two aspects of the decision-making process that are of interest to distance educators. The first is that the decision by a distance learner to persist or withdraw is manifest by their continued or discontinued participation, but the process involved in reaching that decision may not be made clear to the institution. As Dirkx and Jha (1994) observe, the reasons for withdrawal are often unknown because, as Roberts (1984) points out, students prefer to drop out without communicating the reasons or indicating the type of problem they are experiencing. One learner in this study withdrew from her program without informing her facilitator. Her reasons for withdrawal and the process by which she reached that decision are not known.

Two other learners in this research are examples of the second aspect of the decision-making process that is of concern to institutions. That is, regardless of the learner support mechanisms and other institutional factors contributing to persistence, support from the learners' partners and the strength of their commitment to their goals may be more likely to determine the outcome. One learner reported that she discussed her consideration of withdrawal with her husband, who "talked her out of it a couple of times," and she also is determined to reach her goal of high school graduation. Likewise, another learner emphasized that spousal support was important in her decision to persist. A third learner didn't discuss her decision with her spouse nor did she use the learning plan journal for what she described as "self talk," but her commitment to her educational goals is very strong. The decision to persist or withdraw appears to be private and personal rather than shared with the facilitator.

Does interaction with the facilitator influence motivation?

The results of this research indicate that the private nature of the decision to persist or withdraw may cause learners to be unwilling to share their thoughts even with facilitators who may be in the best position to help ease their anxiety and achieve success. One learner who considered withdrawing was reluctant to share any personal information, including her goals, with her facilitator. The facilitator commented that even if the learner had been willing to interact, viewing herself as unsuccessful would be a stronger influence on her ability to persist than anything the facilitator would say or do. This is consistent with Powell, Conway, and Ross's (1990) model of factors affecting success and persistence. Their model suggests that life changes and institutional factors do not, in most cases, act as direct causes of student withdrawal; they are mitigated through interaction with the learner's predisposing characteristics.

On the other hand, another learner stated that comments from the facilitator such as "how can I help you meet this goal?" can provide motivation. This response indicates a willingness by both facilitator and learner to engage in meaningful dialogue, a factor that Sweet (1986) found to be significant in influencing the distance learner's commitment and sense of institutional integration.

Does the use of an online learning plan affect decisions related to continuation in a course or program of study?

A focal point of this research was determining whether the process of learning plan development engages learners and facilitators in an intentional, ongoing dialogue that can enhance rapport, keep learners focused on their goals, and promote the self-concept of a successful learner. Two learners and both facilitators participating in this research

commented on how the learning plan affects motivation to continue. One learner stated that the learning plan can help learners achieve immediate objectives by encouraging them to set goals and feel accountable, but also enable them to reassess those goals if necessary in order to gain a sense of achievement. Another learner described the learning plan as “a tool for helping me” and “it can help you achieve your immediate objectives by keeping you on the right track as it is easy to be swayed in other directions. It will help keep you focused because it is easy to get distracted.” The facilitators agreed, stating “The learning plan can contribute to course progress,” and “The learning plan can be an unobtrusive reminder to stay on track with course work.” These comments are consistent with Chyung (2001) who views interaction as an opportunity for goal-oriented and achievement-oriented learners to set short term goals, receive specific guidance on how to successfully accomplish these goals, and receive concrete and constructive feedback in a timely manner. Chyung (2001) suggests providing a private, online discussion area to enable the learner to easily contact the facilitator to ask for advice comfortably. During this study, use of the online learning plan for learner-facilitator dialogue was limited. The results indicate, however, the online learning plan has the potential to provide a medium in which this type of dialogue can occur either synchronously or asynchronously.

Does use of this learning plan influence learners’ perceptions of interaction and support?

The results of this research suggest that interaction with facilitators, particularly through learning plan dialogue, is important to learners. Two learners emphatically stated that more interaction and involvement with the facilitator would be beneficial. As an adult who spends most of her time with her children at home, one learner stated that she looked

forward to interacting with another adult through the learning plan dialogue, and she would have liked to have had more interaction. Another attributed her feelings of frustration and uncertainty to a lack of interaction, and identified the lack of response from the facilitator in the learning plan journal as a factor that caused her to stop using it. Evidence supporting this is available in the dated learning plan files which show that she entered a comment in her journal on November 18, but the facilitator did not respond until December 10. During her final interview, this learner described communication with the facilitator as “poor.” The other learner received feedback to her first journal comment within two days, although response to her other entries was delayed by up to 2 ½ weeks. In her final interview, she stated she would like more interaction, but she didn’t express dissatisfaction with the low volume or timing of responses to her journal entries, instead acknowledging that the facilitator was busy during that time. These results suggest that an early response, even when followed by subsequent delays in responding, may contribute to more positive perceptions of interaction; however further research is required to determine how timing influences these perceptions.

This research suggests that using the learning plan can lead to perceptions of support offered by the institution. One learner observed “some people can work well independently while others need an extra push,” and for her using the learning plan provided encouragement and motivation. Another, who felt dissatisfied with the overall level of support received, clearly stated that she needed more direction and was waiting for someone to tell her what to do. One of her early journal entries expressed concern over her ability to understand math concepts; a more timely response than the one received might have helped her feel more supported in her learning activities. The results of this research suggest that using the learning plan can strengthen the link between the learner and the facilitator, thereby

increasing what Tinto (1975) describes as institutional integration, a factor contributing to continuation in educational programs.

Is the learning plan useful as a tool for interaction between facilitators and learners in a distance learning environment?

The results of this research are inconclusive regarding the usefulness of the online learning plan as a medium for interaction between learners and their facilitators. It is not clear from the data whether the low volume of interaction was the result of factors within or external to the learning plan itself. One facilitator stated, “The learning plan is the missing piece for contact with students,” and he did use the learning plan to interact with his learners, although the data shows that this occurred at only two times during the research timeframe. In his interview, he attributed this primarily to a lack of time. There is no evidence in the data to indicate the other facilitator used the learning plan to communicate. This appears to be the result of the aborted first face-to-face interaction with the learner who gave no indication that she would make further use of the learning plan herself, but the facilitator admitted that she never logged on to confirm this. In addition, this facilitator has less experience in supporting learners other than in a face-to-face situation whereas the other facilitator uses phone, email, and vClass.

Lack of experience with the technology may also have affected usage by the learners. One facilitator reported that it was sometimes necessary to show the learners how to use the computer at the same time he was getting them started with the learning plan. Four of his learners experienced technical difficulties when working on their own. One couldn't access the learning plan from her home computer, although she reported she may have had an incorrect web address, but did not contact the facilitator for assistance. Another was eager to

use the journal and action plan features, but experienced difficulty in saving the data so she could retrieve it at a later time. She requested and received assistance from the facilitator immediately, and did not get discouraged in her use of the learning plan. The third was confused by an error message she received when trying to log in to her learning plan. The facilitator forwarded her emailed query to me, and I responded with instructions to assist her in proceeding. The last learner who encountered difficulty reported that her password wouldn't work, and the facilitator assisted her with this problem. The problems encountered by these learners appears to be related to their lack of experience in using the technology rather than problems inherent in the design of the online learning plan.

As Ryan (2001) points out, delivery of quality learner support services is “compounded by distance and a new medium of delivery, one which brings additional support needs in both instructional methods and technical skills” (p. 77). Furthermore, Anderson & Garrison (1998) state, “Supporting learner-teacher interactions through technology requires access and opportunities to become proficient with the appropriate technology in use” (p. 102).

Learners also reported that a lack of time prevented them from accessing the learning plan more often. As Peters (1992) points out, the multiple social and cultural roles filled by adults “make great claims on them – with regard to time, but also with regard to devotion and interest” (p. 241). Adults taking on the demands of being a student in addition to their existing roles require forms of support that are different from those offered to “traditional” students (Dearnley, 2003). It appears from the results of this research that the online learning plan has the potential to support interaction between learners and facilitators, but barriers

related to a lack of time and experience with technology restrict its usefulness for this purpose.

The results from this data suggest that the willingness of learners to share personal information is reflected in the perceptions of the facilitators of the level of rapport they share with their learners. The facilitator who experienced resistance from the learner reports that “no connection” was made between them. Because they never used the learning plan for interaction, their lack of rapport cannot solely be attributed to this form of communication. On the other hand, the second facilitator felt using the learning plan helped him get to know the learners better, and their honesty provided him with greater insight into what was going on in their lives than when they just come to his centre to pick up or drop off assignments. These findings are consistent with Flottemesch (2000) who encourages facilitators to study the characteristics of their students, discover why they have enrolled, their educational experiences, and their interests as a means of developing rapport.

To what extent do facilitators and learners use the online learning plan to communicate in the distance education environment?

The results of this research indicate that the online learning plan has the potential to be used for communications between distance learners and their facilitators. As shown in Table 4, one facilitator responded to 7 of 23 entries made by learners in their personal journals. In addition, he attempted to initiate dialogue by entering a comment in the journal of another learner. The other learner and facilitator did not make any journal entries.

Table 4. Online learning plan journal entries

<i>Learner</i>	<i># Journal Entries</i>	<i># Entries (Facilitator 1)</i>	<i># Entries (Facilitator 2)</i>
Kathy	20	6	
Justine	1	1	
Ruth	2	0	
Carol	0	1	
Lynne	0	0	
Arlene	0		0

The online learning plan is designed to be available to learners and facilitators “anytime and anywhere.” The data indicate that this feature was utilized by learners. After creating their learning plan files at their learning centres, learners accessed the learning plan from home or other locations. Using access times based on the last saved data modification, learners were twice as likely (9 occasions vs. 4 occasions) to access their learning plans outside of traditional school hours once the learning plan file had been created. Five modifications were made in the early morning (before 8:30 a.m.) and four in the late afternoon or evening (between 4:00 p.m. and midnight) while only five were made during the 8:30 a.m. – 4:00 p.m. school day. There is no indication that the facilitator accessed the learning plan files at times outside of his normal work time or place, although he was aware that this was possible. The availability of anytime/anywhere access to support is consistent with LaPadula (2003) who states, “Distance learners need to access services in the same way they access instruction: from a distance and at times that fit their schedules” (p. 120).

Both facilitators felt that the amount of preparation they had prior to initiating work with the learners on their learning plans influenced their ability to be effective in this process. The facilitator who did not use the learning plan clearly expressed a need for better preparation and familiarity with its features. She stated that before working with other learners she will increase her knowledge of the learning plan tool so that she can make

suggestions to learners regarding their approach to the prompts. She also suggested that knowing more about the individual learner before commencing the dialogue would be beneficial. The other facilitator agreed that this type of collaboration with his learners would be more successful if he had established a relationship with each of them first. He felt he was adequately prepared and knew what to do, but a lack of time was the biggest barrier he encountered. Hayes' (1990) states, "the use of learning contracts in distance education as well as other settings demands that the instructor spend considerable initial planning time with learners" (p. 34); however there is no evidence in this research that educational organizations encourage facilitators to allocate their time to this task, hence its low priority in their busy work day. It has been almost 20 years since Hiemstra (1985) called for a recognition that adult educators need skill development in the area of learner support and guidance; however, high school teachers from traditional programs, such as the facilitators observed in this study, may be asked to work with adult learners without additional training.

In addition to the results outlined above regarding learner usage of the journal section of the online learning plan, learners accessed other sections as shown in Table 5.

Table 5. Online learning plan activity by section

<i>Learning Plan Section</i>	<i># Learners Completing at Least One Response</i>
Adjective Descriptors (Who Am I? page)	4
Past Learning Experiences	3
Future Learning Opportunities	1
Career and Employment Information	0
Setting Goals	1
Celebrate Success	2
Action Plan	0 *
* 1 learner indicated that she tried twice to save information to the Action Plan but was unsuccessful.	

As mentioned above, lack of time and problems with the technology were the greatest barriers to usage experienced by the learners. The latter is consistent with one of the characteristics that Chyung (2001) identifies with new online learners; that is, their lack of knowledge of using Internet-based media technology. An unintentional benefit of using the online learning plan may be evaluation of the technical skills of learners to determine if they require the interventions that Chyung (2001) recommends: providing a technical training program, eliminating or reducing complexities of online communication system that cause confusion, and providing ongoing technical support in a timely fashion (p. 41). Improving the learners' technical skills will not only reduce one barrier to their use of the learning plan, but it should improve their ability to progress in their course work, particularly in the technology-based learning programs that were the focus of this study.

What components of the learning plan do facilitators and learners find the most useful?

Learners and facilitators found the online learning plan straightforward and easy to use and understand. One learner commented, "Everything is right there, so an explanation may not even be necessary." The sections of the online learning plan most often listed as being valuable by the learners were Goal Setting and the Learn More links to post-secondary and career information. One learner who was particularly appreciative of these features stated, "The learning plan encourages long-term goal setting, especially by providing links to explore opportunities. It makes you think about what you want to do in one or five years from now and causes you to dwell on it . . . it opens doors to the future." Two others agreed that they would use the Goal Setting feature help them develop a long-range education plan.

Other sections that learners and facilitators found valuable were the Future Learning Opportunities page, the Journal, and the Action Plan. One learner commented on the value of working through the Future Learning prompts, “I already know what I have done, but I need to know what I am doing in the future.” Although one facilitator listed the Action Plan as valuable, he also stated, “Learners will have the most trouble developing an action plan and will need help to focus rather than be totally self-guided” in this section.

One learner identified the Career/Employment Information section of the learning plan as not being very useful for her as she is not currently working. She also felt the links to fun quizzes on the Learn More About Myself page would be used more by younger learners than adults.

One facilitator stated that he thought the Goal Setting page would not be useful. This appears to be in contradiction to his later statement that “I would like to focus on educational goals rather than other aspects of their lives.”

Summary of Results

The purpose of this case study was to explore the use of an online learning plan by facilitators and adult learners to determine the influence this method of support has on motivation and decisions to persist or withdraw from educational programs. Data were collected using observation, documentation, and interviews.

Learners and facilitators participating in the study utilized the online learning plan in varying degrees ranging from no usage to high usage (defined as data entered in more than four sections of the learning plan and/or evidence of file access three or more times in addition to initial file creation). The data suggest a link between orientation to the learning plan provided by the researcher and higher levels of usage by the learners.

The findings of this study are consistent with other research that the decision to persist or withdraw is private, and the reasons leading to a decision may never be known by the institution. The influence of the learner's interpersonal environment has a greater influence over these decisions than institutional factors, although interaction with the facilitator can provide encouragement and motivation to continue, and the online learning plan has the potential to provide opportunities for this interaction to occur. Learner perceptions of institutional support may be enhanced through the use of the online learning plan as it can strengthen the link between the learner and the facilitator through anytime/anywhere access.

These results indicate a need for further research with a greater number of learners and facilitators over a longer period of time to determine the effectiveness of the online learning plan as a tool for increasing motivation. In spite of the limited usage by this group, the results indicate there are features of the learning plan that make it an environment conducive to support and guidance. Furthermore, using the learning plan can contribute to what have been found in the literature to be key factors leading to success in academic programs: goal commitment, institutional integration, and self-concept as a student with a potential for success.

Generalizability of the Results

The generalizability of this study is admittedly limited. However, "In qualitative research, a single case or small nonrandom sample is selected precisely because the researcher wishes to understand the particular in depth, not to find out what is generally true of the many" (Merriam,1998, p. 208). Case study methodology was appropriate for this research as the goal was to describe and gain understanding of human behaviour rather than

to determine whether or not a cause and effect relationship exists between use of the online learning plan and persistence or withdrawal.

When assessing the quality of the results of this study, several factors must be considered. Merriam (1998, p. 202) suggests several questions that might be asked to challenge the trustworthiness of qualitative research in general and this study in particular:

- What can you possibly tell from such a small group of participants?
- What is it worth to get one person's interpretation (the researcher's) of someone else's interpretation (a participant's) of what went on?
- How can you generalize from a small non-random sample?
- How can we be sure the researcher is a valid and reliable instrument for data collection and analysis?
- How do we know the researcher isn't biased and just finding out what he or she expects to find?
- Doesn't the researcher's presence so alter the participants' behaviour as to contaminate the data?
- Don't people often lie to field researchers?
- If somebody else did this study, would they get the same results?

This study attempts to describe the experiences of a small group of learners and facilitators using an online learning plan tool. Researcher bias must be considered when assessing the credibility of the data. Bias in the interpretation of the data may arise from the developer of the learning plan tool also serving as the researcher in this study. The relationship of the researcher with the participants may also contribute to bias. However, even with the limited

amount of data gathered in this study, there is evidence to suggest the value of the online learning plan tool and that it is worthy of further development.

Future research in this area should continue using case study design, encouraging the participants to describe their personal perceptions of their behaviour and thereby adding a dimension to the results that cannot be achieved through observation by the researcher alone. As Yin (1994) suggests, case studies are generalizable when applied to theory, but not to populations. With respect to the small group of learners and facilitators participating in this research, the results appear to be congruent with the theories encountered in the literature. However, further research is required to reflect on whether the results are also representative of other groups of returning adult learners.

The conclusions drawn from this study that are presented in the next chapter will be considered to be working hypotheses requiring further study. It is anticipated that this study will serve as a preliminary investigation to a longer term study involving a greater number of cases over a longer period of time being observed by multiple interpreters.

CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

Introduction

Previous research links strength of goal commitment, interaction between learner and facilitator, and a positive self-concept to motivation of adult learners in a distance education environment. These elements are enhanced in an environment of support and guidance provided through the collaborative process of developing and maintaining a personal learning plan. With this in mind, the online learning plan was developed as a tool to be used by learners and facilitators for intentional, ongoing dialogue focused on acknowledging each learner's personal context and designing an action plan of learning activities to assist in goal attainment.

In spite of the limited amount of experience in using the online learning plan, the group of learners observed in this study recognized its potential benefits as though they were quoting from the literature. They acknowledge that goal commitment results from participation in identifying appropriate, achievable goals that are recorded and shared. They value the intentional dialogue that is the heart of the learning plan process. They appreciate the recognition of their individual strengths and their need to balance multiple roles. They welcome the opportunity to build confidence and see that success in academic pursuits is possible.

The online learning plan has the potential to link the learner to her educational program, providing the increased motivation, encouragement, and commitment that are crucial to continued participation and success. However, as noted by the facilitators, time for

working on learning plans cannot be left to chance; it must be incorporated into their regular routine, and they must be adequately prepared to engage in learning plan dialogue.

Review of Research Results

This case study observed six learners and two facilitators using an online learning plan tool in high school completion programs over a period of between six and ten weeks in the fall term, 2003.

The results of this research were examined from two perspectives. The first was an analysis of the findings in relation to themes found in the literature regarding the nature of adult learners, self-concept, motivation and persistence, learner support, learner-facilitator interaction, and goal-setting. The second approached the results from the perspective of how an online learning plan could be effective in supporting distance learners in persisting and reaching their goals.

Within the theme of the nature of adult learners, the findings of this research suggest that learners who participated in this study have similar experiences and circumstances to adult learners described in the literature. This similarity allows for the assumptions that this group is not unusual in their motivations for returning to learning as adults, and their needs are consistent with those identified in the literature.

The theme of self-concept is also found in the results of this study. The evidence of past and present experiences reported by these learners is consistent with the literature that concludes that academic self-concept is closely linked to academic achievement.

Within the theme of motivation and persistence, the learners participating in this study identified motivating factors similar to those found in the literature. External

motivators such as the desire for a better job and internal motivators such as a need to feel a sense of accomplishment are consistent with those found in the literature.

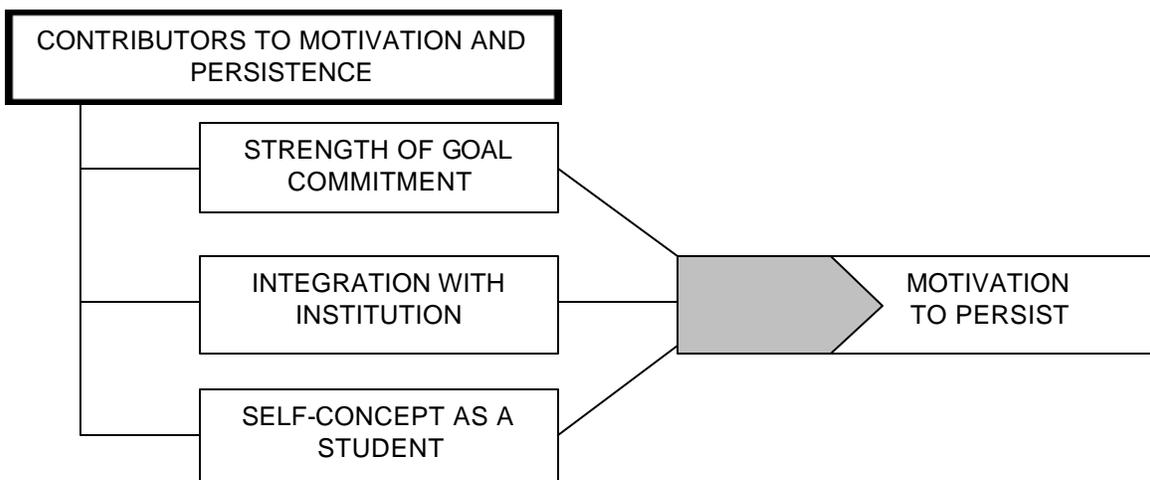
The findings of this research are consistent with the literature related to the theme of learner support in distance education environments. The learners in this study perceived support from family, friends, and facilitators as being an important motivator, keeping them on target to achieve their goals.

The importance of learner-facilitator interaction is another theme arising from the literature that is highlighted in the results of this research. Learners and facilitators acknowledged the benefits of interaction for providing encouragement and developing rapport.

The final theme from the literature used for analysis of the research data is the importance of goal setting. The process of establishing personal goals provides motivation especially when the learner participates in the development of realistic, achievable goals.

These results support the concepts arising from the literature that are represented in Figure 2. Goal setting, learner-facilitator interaction, and self-concept as a successful student are key elements of motivation and persistence for adult learners.

Figure 2. Elements contributing to motivation and persistence for adult learners



The results of this research were also viewed through the lens of the online learning plan, focusing on the particular needs of adult distance learners that can be addressed through the use of the online learning plan. Adults returning to formal educational environments have different needs from teenagers. Distance learners have different needs from those participating in face-to-face classroom programs. The online learning plan provides a means for distance educators to better understand and respond to these needs. Discussion with learners in response to the prompts in the Who Am I, Past Learning Experiences, and Career and Employment Information sections of the learning plan can provide insight into the personal and situational attributes of the learners as they return to learning and as they progress over time.

One of the attributes that makes distance learners different from learners in traditional classroom settings is their isolation from their peers, their facilitators, and from the institution itself. The process of developing and maintaining the learning plan supports ongoing dialogue between facilitators and learners that enhances rapport, reduces transactional distance, and increases the connection between the learner and the institution.

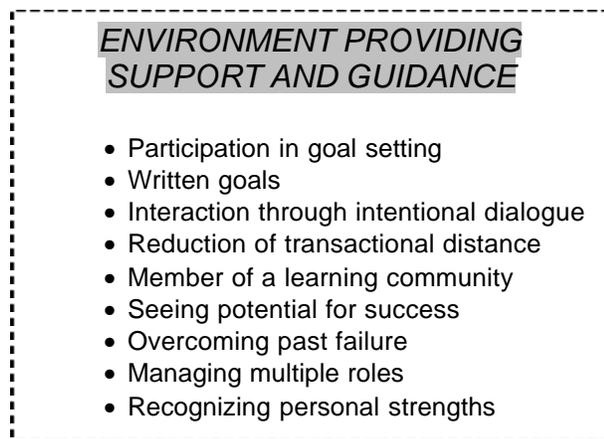
Returning adult learners are often burdened by their past failures in educational endeavours. The learning plan encourages recognition of personal strengths and lifelong learning that has occurred through raising a family, being employed, and contributing to community life. Responses in the Past Learning Experiences and Celebrate Success sections of the learning plan contribute to a positive self-concept as an individual capable of success in academic pursuits.

As the results of this research show, participating in identifying goals and sharing them with others increases commitment to attaining those goals. The learning plan

contributes to this process by encouraging learners to develop short and long term goals, then creating an action plan that will assist learners in progressing toward goal fulfillment.

The opportunities provided in the learning plan are summarized in Figure 3. The learning plan, because it can be accessed at the user's convenience both in terms of time and place, has the potential to provide an environment of support and guidance that is often difficult to achieve in distance learning settings.

Figure 3. Environment providing support and guidance



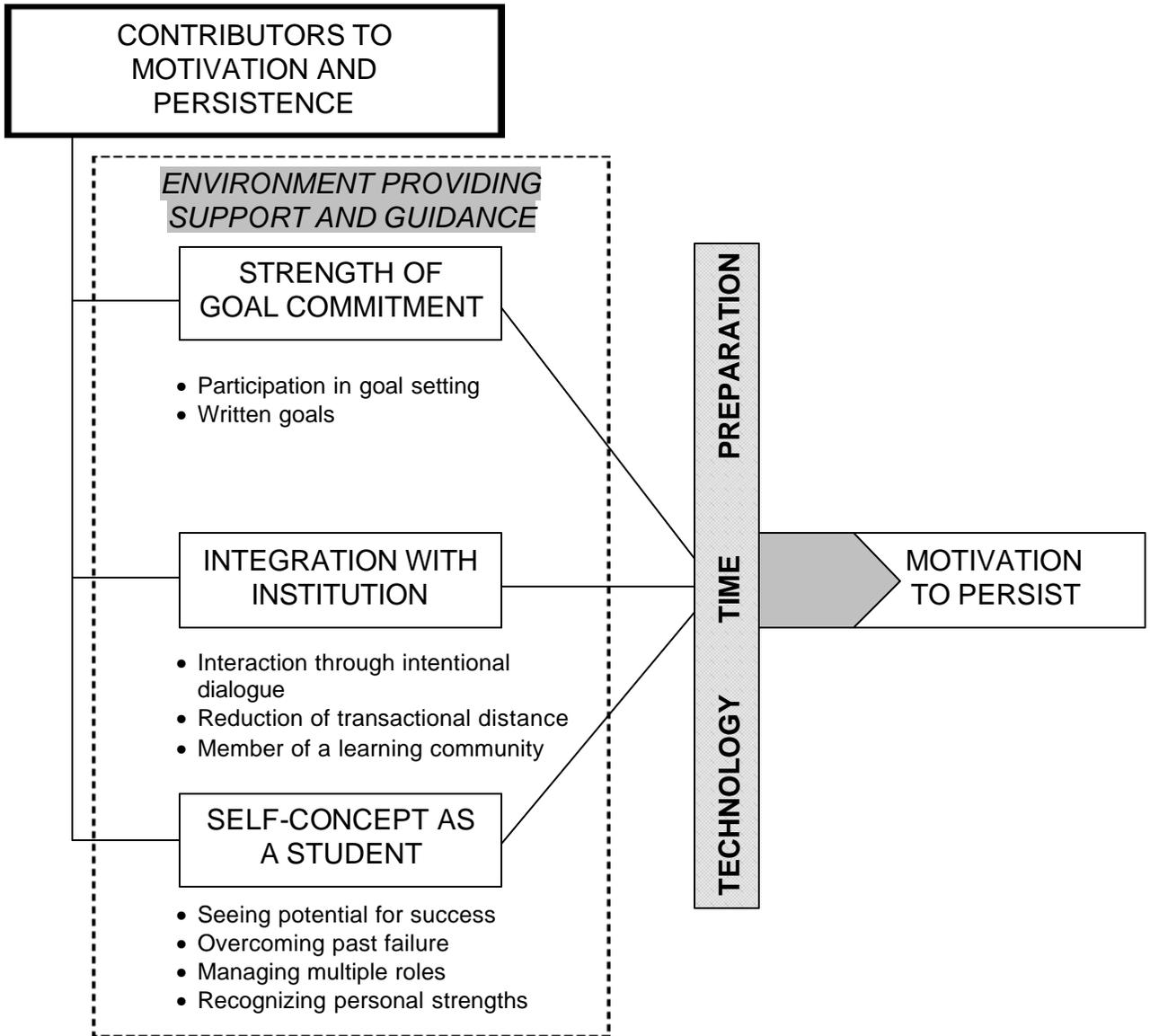
While the learning plan provides the potential for enhancing learner motivation and persistence, this research identifies barriers that must be overcome before it can be used effectively. These barriers include the lack of time for activities related to educational pursuits due to the multiple roles filled by most adults, access to and expertise in using the technology required by the online learning plan, and improved preparation of facilitators so they understand the needs of adult learners and can assist them in achieving success.

The identified need for improved training of the facilitators is consistent with Salmon (1999), who states, “Any significant initiative aimed at changing of teaching methods or introducing technology should include staff development and effective support and training of those responsible for the delivery, otherwise its outcomes are likely to be meager and

unsuccessful.” Training must accommodate people with a wide range of prior skills and knowledge, both with the technology and in the development of individualized student learning plans. Salmon suggests that introduction of new programs “needs to be intrinsically motivating and lead to competent practice.” Facilitators won’t build in the time to use the online learning plan if they don’t acknowledge its benefits and personal usefulness in carrying out their responsibilities.

As shown in Figure 4, the findings of this research suggest that the environment providing support and guidance that is available through use of the online learning plan has the potential to contribute to the elements identified in the literature as being related to motivation and decisions regarding persistence or withdrawal. Opportunities for intentional dialogue between learner and facilitator enable the learner to participate in setting personal goals which are formalized in writing. The interaction inherent in the learning plan development process can reduce transactional distance and increase institutional integration by increasing contact between the learner and the facilitator (as the representative of the institution), enabling the learner to identify herself as a member of a learning community. Finally, the learning plan enables the learner to see herself as a successful learner who is able to overcome past academic failure by recognizing her strengths and balancing the multiple social and cultural roles that are part of adulthood. Although the learning plan has the potential to contribute to motivation and persistence, lack of time, technological skill, or adequate preparation may impose barriers to its effectiveness.

Figure 4. Online learning plan model of effectiveness



Implications for Further Research

This limited case study indicates that the online learning plan has the potential to be a useful tool for learners and facilitators who are separated by time and space in the distance learning environment. Although the methodology employed in this research appears to be appropriate, some suggestions for change are indicated by the results.

Changes to the learning plan database to record the date of all logins, including those when no data was entered or saved, would improve data collection regarding access to the learning plan files. Further research involving a larger group of facilitators and learners across a wider variety of educational programs over a longer period of time would provide concrete evidence and more generalizable findings. In future research, data analysis should be carried out by multiple readers in order to eliminate bias and enhance the validity of the findings.

It was originally intended that the online learning plan tool that is the focus of this research would be used by the participants in place of any existing learning plan documentation at the time the learners enrolled in their programs. This is usually done as part of the intake process. Due to the delay in the start of using the online learning plan, it must be assumed that other discussions took place between learners and facilitators, leading to the development of a relationship between them prior to initiating use of the online learning plan. These prior relationships and interactions may have had an impact on the results and should be considered when designing future studies.

Implications and Recommendations for Distance Education Practice

Distance education providers are competing in an expanding marketplace, attracting increasing numbers of adult learners, many of whom face situational, institutional, or

dispositional barriers that impact their ability to participate and be successful. It is imperative that educational institutions focus on supporting learners who are particularly at risk of failure as they encounter the academic and emotional challenges of returning to school as adults. Learning plans could be an integral part of a learner support system, providing support and motivation for the learner to continue and be successful.

The online learning plan can open the channels of communication between learners and facilitators by providing a series of prompts designed to elicit responses from the learners, enabling facilitators to help learners to articulate their learning needs and goals. Involving the learners in the development of learning plans encourages ownership and commitment, further increasing the likelihood of success.

The role of the facilitator in distance learning environments is changed from that of an instructor in the classroom. Goodnight, Randolph, and Ziekkel (1998) suggest that this role includes that of consultant, collaborator, and resource, helping students to successfully accomplish their personally defined objectives. Salmon (1999) agrees that “online teaching and learning changes the scope and the competencies we require of teachers.” Salmon lists a variety of skills required including flexibility, adaptability, confidence to intervene, ability to build trust, ability to be a catalyst, knowing how much to control and when to stand back, ability to monitor and evaluate, willingness and ability to experiment with different approaches, competence with technology and operational understanding of software, ability to support and challenge, and ability to engage with people and achieve interaction. All of these traits would be beneficial for facilitators in their collaboration with learners in the use of the online learning plan.

As the results of this research indicate, not all facilitators and learners will be successful in using the online learning plan. Moore (1993) indicates the combination of dialogue, structure, and autonomy in the learning environment will determine the degree of transactional distance that must be overcome before a relationship can be formed between the facilitator and learner. Moore suggests that time, creative effort, understanding learner characteristics, deploying new skills in the changing the role of the facilitator, and selecting appropriate media for communications are factors which influence the opportunities for reducing transactional distance.

Distance learners have different needs from on-campus learners. Adult learners have different needs from children and teenagers. It is therefore recommended that distance education providers seek ways to address these differences through improved learner support systems that are accessible when and where the learners want them and can access them. The online learning plan can be an effective tool to provide this support.

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APPENDIX A

CONSENT FORMS

[date]

Dear [facilitator],

I am a student enrolled in the Master of Distance Education Program at Athabasca University, and I am currently working on the thesis component of my degree.

I am contacting you to determine your interest in participating in a case study project researching the use of student learning plans in the online environment. The purpose of this research is to explore and describe the effects of creating and using an online learning plan on persistence of adult learners in a distance delivery high school completion program. I am seeking two facilitators and three learners to participate in this research. Ideally, the facilitators will have some experience in working with adults and developing learning plans (either face to face or at a distance), and the learners will be over the age of 19 and returning to learning in September, 2003, after an interruption in their enrolment in any educational program of at least 12 months.

Participation requires the use of an online learning plan tool that I have developed. This tool is accessed via the Internet, however, access will be password controlled to ensure privacy of all participants. You may preview a prototype of this tool at <http://community.netidea.com/ekinsel>. Interaction between facilitator and learner can be either asynchronous or synchronous, utilizing an application such as Elluminate's vClass to enhance synchronous interactions.

Web server logs and archived vClass sessions will be used to record the dialogue between facilitators and learners. Learners will be interviewed by telephone at the beginning

and end of the fall term; facilitators will be interviewed by telephone at the end of the fall term. Participants will be asked to keep a list of the date, topic, and medium (e.g., phone or email) used for interactions that occur outside the scope of the learning plan itself. The detail of these external interactions will not be reported to the researcher.

The confidentiality of all participants is assured. Names or other identifiers will not appear in any reporting of findings. Only the participants, the researcher, and the web server administrator will have access to the files. My interest is in the process of using the learning plan rather than any specific responses entered by the learner.

To summarize, facilitator participation in this project requires:

- 1) consent to participate
- 2) identification of potential learner participants
- 3) familiarization with the online learning plan tool
- 4) training in the use of vClass (may not be required)
- 5) synchronous and/or asynchronous use of the learning plan tool with 1-3 adult distance learners during the period September-December, 2003
- 6) list of email and phone communications external to learning plan
- 7) telephone interview at the end of the research period

and learner participation requires:

- 1) consent to participate
- 2) synchronous and/or asynchronous use of the learning plan tool during the period September-December, 2003
- 3) record of email and phone communications external to learning plan
- 4) telephone interviews at the beginning and end of the research period

It is anticipated that the results of this research project will be submitted and retained as a thesis, will be digitized and made available via the university's normal dissemination processes, and might be summarized and circulated in the academic press, including interlibrary loan and thesis abstract services. All data collected for this research will have personal identification of participants replaced with codes known only to the researcher. Data will be removed from the web server following the end of data collection when it will be stored for a period of 5 years on CD-ROM prior to being destroyed. Interview notes and any other documents generated as part of this study will also be destroyed after 5 years.

Please consider participating in this important research and provide a response before [date]. I would like to confirm the facilitator participant group by that date.

Yours truly,

Ellen Kinsel
MDE Student

Please fax the following to 604.648.8462

I have read and understand the description of the online learning plan research project and hereby consent to participate, agreeing to all conditions and expectations as outlined.

Signature

Date

Print name

Phone number

email

[date]

Dear Adult Learner,

I am a student enrolled in the Master of Distance Education Program at Athabasca University, and I am currently working on the thesis component of my degree.

I am contacting you to determine your interest in participating in a case study project researching the use of student learning plans in the online environment. The purpose of this research is to explore and describe the effects of creating and using an online learning plan on persistence of adult learners in a distance delivery high school completion program. Your facilitator has recommended you for participation in this research.

Participation requires the use of an online learning plan tool that I have developed. This tool is accessed via the Internet; however, access will be password controlled to ensure privacy of all participants. Your online dialogue with your facilitator related to the development and maintenance of your personal learning plan will be documented. You will be asked to participate in telephone interviews at the beginning and end of the fall term. You will also be asked to keep a list of the date, topic, and medium (e.g., phone or email) used for interactions that occur outside the scope of the learning plan itself. The detail of these external interactions will not be reported to the researcher.

The confidentiality of all participants is assured. Names or other identifiers will not appear in any reporting of findings. Only the participants, the researcher, and the web server administrator will have access to the files. My interest is in the process of using the learning plan rather than any specific responses that you enter. Your participation is entirely voluntary and you may withdraw at any time with no penalty.

To summarize, your participation in this project requires:

- 1) consent to participate
- 2) synchronous and/or asynchronous use of the learning plan tool during the period September-December, 2003
- 3) record of email and phone communications external to learning plan
- 4) telephone interviews at the beginning and end of the research period

It is anticipated that the results of this research project will be submitted and retained as a thesis, will be digitized and made available via the university's normal dissemination processes, and might be summarized and circulated in the academic press, including interlibrary loan and thesis abstract services. All data collected for this research will have personal identification of participants replaced with codes known only to the researcher. Data will be removed from the web server following the end of data collection when it will be stored for a period of 5 years on CD-ROM prior to being destroyed. Interview notes and any other documents generated as part of this study will also be destroyed after 5 years.

Please consider participating in this important research and provide a response within the next 5 days.

Yours truly,

Ellen Kinsel
MDE Student

I have read and understand the description of the online learning plan research project and hereby consent to participate, agreeing to all conditions and expectations as outlined.

Signature

Date

APPENDIX B ONLINE LEARNING PLAN

Figure B1. Online Learning Plan - Login Screen

Personal Learning Plan

Logon

Please enter your UserId and password:

UserId:

Password:

- or -

Register

If you are a *new user*, please register by choosing a UserId and password, and providing your name. You may use your name for UserId.

UserId:

Password:

Name:

Figure B2. Online Learning Plan – Home Page

[Home](#) [Who Am I?](#) [Learning](#) [Career](#) [Setting Goals](#) [Celebrating Success](#)

Personal Learning Plan

Your personal learning plan belongs to you. Use it to develop your personal goals and explore learning opportunities to help you achieve them.

Tools:
[Learn more...](#)
[My Journal](#)
[Action Plan](#)

Your learning plan is a process that involves giving and receiving feedback. It is an opportunity for reflection, dialogue, and discussion on your own and with the help of others.

Your learning plan acknowledges and builds on previous learning and experience. It is a working document that will be revised as you grow and change.

Use your journal to make notes, ask questions, and to record your thoughts and feelings as your learning journey unfolds.

[Acknowledgements and References](#)

[Home](#) [Who Am I?](#) [Learning](#) [Career](#) [Setting Goals](#) [Celebrating Success](#)

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Figure B3. Online Learning Plan – Action Plan

Home
Who Am I?
Learning
Career
Setting Goals
Celebrating Success

Personal Learning Plan

Action Plan

Tools:

[Learn more...](#)

[My Journal](#)

[Action Plan](#)

This is what I intend to start to learn, experience, or join in the next 6 months:

Activity/Skill	Where I Intend to Learn It	Who will Help Me?	Planned Start Date	Planned Finish Date	I will know I have succeeded when...

This is what I intend to start to learn or experience between 6 months and 1 year from now

Activity/Skill	Where I Intend to Learn It	Who will Help Me?	Planned Start Date	Planned Finish Date	I will know I have succeeded when...

This is what I intend to start to learn, experience, or join at some time after 1 year

Activity/Skill	Where I Intend to Learn It	Who will Help Me?	Planned Start Date	Planned Finish Date	I will know I have succeeded when...

Figure B4. Online Learning Plan - My Journal (Partial)

[Home](#)
[Who Am I?](#)
[Learning](#)
[Career](#)
[Setting Goals](#)
[Celebrating Success](#)

Personal Learning Plan

Tools:
[Learn more...](#)
[My Journal](#)
[Action Plan](#)

Date mm/dd/yy	My Notes, Comments, Thoughts, Feelings, Questions	Facilitator's Response
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure B5. Online Learning Plan - Learn More

[Home](#)
[Who Am I?](#)
[Learning](#)
[Career](#)
[Setting Goals](#)
[Celebrating Success](#)

Personal Learning Plan

Learn more...

Tools:
[Learn more...](#)
[My Journal](#)
[Action Plan](#)

About myself

What kind of dog am I?	Color Quiz
What is my main talent?	Learning Style 1
Personality test	Learning Style 2
What is my work style?	Just for Fun Personality Quizzes

About educational opportunities

Universities and Colleges in Canada	Computer Skills Training
Distance Learning	

About careers

Careers of the Future
Career Paths Online
Opening Doors

Figure B6. Online Learning Plan - Who Am I?

[Home](#)
[Who Am I?](#)
[Learning](#)
[Career](#)
[Setting Goals](#)
[Celebrating Success](#)

Personal Learning Plan

Who Am I ?

Tools:

[Learn more...](#)
[My Journal](#)
[Action Plan](#)

Name
 Address
 Phone
 email

Male Single Children: Yes No
 Female Living with a partner Age of youngest child:

Are you currently working? Yes No

How would you describe yourself?

Ambitious	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Dedicated	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Competent	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Intelligent	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
A (potential) leader	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Creative	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Adaptable/Flexible	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Determined	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Forward looking	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all

Figure B7. Online Learning Plan - Past Learning Experiences

Home
Who Am I?
Learning
Career
Setting Goals
Celebrating Success

Personal Learning Plan

Tools:

[Learn more](#)

[My Journal](#)

[Action Plan](#)

Past Learning Experiences

Go to Future Learning

When was the last time you were enrolled in an educational program?

More than 25 years ago
 15-25 years ago
 5-15 years ago
 Less than 5 years ago

What is the highest level of education that you have achieved?

Elementary grade
 Some high school education
 High school graduation
 Some post-secondary
 Post-secondary degree

Which of these most closely describes your experience of school education?

I enjoyed most of it and worked hard at my studies.
 I enjoyed most of it but didn't work very hard.
 I did what I needed to do to satisfy my teachers and parents.
 There were some good things about it, but I wasn't really interested in schoolwork.
 I dropped out.

How much influence do you think your education had on:

Your attitude to learning a lot a little not at all

Your ability to learn throughout life a lot a little not at all

Your future career a lot a little not at all

Have you participated in training provided by an employer? Yes No

Have you participated in courses or workshops related to

Sports
 Hobby
 Self-improvement
 Other

Have you ever discussed your learning needs with a counsellor or advisor? Yes No

Who usually takes the initiative for you to improve yourself? Myself My employer Other

Try to remember 3 experiences in your life that involved learning something new. Remind yourself of why they were important and how you felt about them at the time.

What was it?	Age	What/Who Helped?	What was the Outcome?
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 5%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

When you start learning something, what helps get you going?

What helps keep you going when you want to learn something?

How do other people help you learn?

What do other people do that doesn't help you learn?

Makes a list of your hobbies and interests. What skills do you use to carry them out?

Hobby/Interest	Skills
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Figure B8. Online Learning Plan - Future Learning Opportunities

[Home](#) [Who Am I?](#) [Learning](#) [Career](#) [Setting Goals](#) [Celebrating Success](#)

Personal Learning Plan

Future Learning Opportunities

[Tools:](#)
[Learn more...](#)
[My Journal](#)
[Action Plan](#)

[Go to Past Learning](#)

What would be the three main reasons for you to participate in new learning opportunities?

- So I can earn more money
- For my own personal satisfaction
- To get a promotion in my workplace
- To widen my employment opportunities
- To keep my brain active
- I enjoy learning new things
- It would help my workplace to prosper
- Other

Which most closely represents your present attitude to education and training?

- I enjoy it and will always be a learner
- I learn mostly to make myself more employable
- I enjoy it but don't have time to learn continuously
- It is necessary to get and keep a job but I don't really enjoy it
- I'm not interested in education and training

How would you prefer to learn?

In the traditional way (with a teacher in the classroom) Self-learning using videos or the computer A mixture of these

How much of your own time would you be willing to spend on education/training each week?

None 1-5 hours 6-10 hours More than 10 hours

When do you prefer to learn?

Part time, daytime Part time, evenings Full time, daytime Full time, evenings On the job with a mentor

Where would you prefer to learn?

At an employer's training centre At a local school At a learning centre At home Other

Would your family support you in taking further learning? Yes No

Figure B9. Online Learning Plan - Career and Employment Information

Home	Who Am I?	Learning	Career	Setting Goals	Celebrating Success
----------------------	---------------------------	--------------------------	------------------------	-------------------------------	-------------------------------------

Personal Learning Plan

Career and Employment Information

Tools:
[Learn more...](#)
[My Journal](#)
[Action Plan](#)

Which statement most closely represents your attitude to career development?

I expect to progress up the ladder and am prepared to go wherever necessary to achieve my ambitions.

I am ambitious but I prefer to climb the ladder within my present company.

I am only moderately ambitious and will take whatever opportunity arises if I like it.

I am not very ambitious - I'll take any job which pays me a living wage.

Do you have a formally worked out personal career plan? Yes No

How would you describe your job under the following words

Interesting	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Repetitive	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
High-level	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Difficult	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Innovative	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Team-oriented	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all
Supervisory	<input type="radio"/> Very	<input type="radio"/> Average	<input type="radio"/> Not at all

Does your present job need you to keep up to date with changing practices and ideas? Yes No

When do you think job-related training should take place?

On company time On own time Half and half Other

How many more years do you hope to be able to work?

35+ 25-35 15-24 5-15 Less than 5 Already retired

Will education/training be a major factor in achieving this goal? Yes No

Do you feel appreciated for who you are in your work environment? Yes No

Is your work environment a place where people can change? Yes No

Make a list of the skills that enabled you to carry out your past and/or present work.

Figure B10. Online Learning Plan - Setting Goals

Home
Who Am I?
Learning
Career
Setting Goals
Celebrating Success

Personal Learning Plan

Setting Goals

In the next 5-7 years, I would like to become...

	Someone who can	And who has achieved
As an Individual	<input type="text"/>	<input type="text"/>
As a Member of My Family	<input type="text"/>	<input type="text"/>
As a Student	<input type="text"/>	<input type="text"/>
In Relation to My Work	<input type="text"/>	<input type="text"/>
In Relation to My Leisure	<input type="text"/>	<input type="text"/>
In Relation to My Community	<input type="text"/>	<input type="text"/>

In the following table, make a list of all of the things you feel you would like to learn and the skills you would like to acquire in the next 5-7 years. Be sure to include:

- What other people have said you are good at
- Things you know you can do and always wanted to prove
- Things you have always wanted to learn but could never find the time
- Skills you have always wanted to acquire (person, social, etc.)
- Things that you feel you are not good at and need to improve upon

Category/Learning Topic/Skill		Priority
To enhance your family life		
<input type="text"/>		
To improve work performance and prospects		
<input type="text"/>		
For your own personal development		
<input type="text"/>		
To improve your sport, hobby or leisure interest		
<input type="text"/>		
To help contribute to my community		
<input type="text"/>		
To develop new experiences, attitudes, and values		
<input type="text"/>		

In the list above, assign a priority to each item as

1. Urgent (I need to learn this as soon as I can)
2. Important (This is important to me but it can wait until later)
3. Low (I would like to learn this, but it has a low priority)

Figure B11. Online Learning Plan - Celebrate Success!

Home Who Am I? Learning Career Setting Goals **Celebrating Success**

Personal Learning Plan

Celebrate Success!

Tools:
[Learn more...](#)
[My Journal](#)

[Action Plan](#)

	Date: <input type="text"/>
	Accomplishment: <input type="text"/>
	Date: <input type="text"/>
	Accomplishment: <input type="text"/>
	Date: <input type="text"/>
	Accomplishment: <input type="text"/>
	Date: <input type="text"/>
	Accomplishment: <input type="text"/>
	Date: <input type="text"/>
	Accomplishment: <input type="text"/>
	Date: <input type="text"/>
	Accomplishment: <input type="text"/>

APPENDIX D

GETTING STARTED WITH THE ONLINE LEARNING PLAN

Online Learning Plan Research Project

Getting Started with the Online Learning Plan

1. The working online learning plan is available at www.ellen.bcelearner.ca.
2. First time users will need to register with a login ID and password. Facilitators will need to know the ID and password that each student has chosen in order to access the learning plan asynchronously. Remind the learners that actual identities will be protected in any discussion of the research.
3. Facilitators and learners can access the online learning plan synchronously using vClass (classroom details will be available shortly). Facilitators should archive (record) any vClass sessions.
4. Encourage learners to use the learning plan throughout the term to record their goals, thoughts, and accomplishments. Journaling space is limited, however, journal items are not limited to a fixed length, so users can add indefinitely to the spaces available. Learners and facilitators can use each available journal space for multiple entries by dating each comment within the text space.

The use of this tool is meant to enhance the experience for both the facilitator and the learner. Hopefully you will find it valuable.

I appreciate any feedback on either the process or the learning plan itself.

Ellen
ekinsel@netidea.com

APPENDIX E

SUGGESTIONS FOR WORKING ON YOUR LEARNING PLAN

The learning plan can be accessed from any computer connected to the Internet by typing in the following address:

www.ellen.bcelearner.ca

You will need your login ID and password. Remember to save at least every 15 minutes.

Any of the responses entered into the learning plan can be revised or updated at any time. You might consider doing the following:

1. Begin by entering information regarding your past learning experiences, future learning opportunities, and career and employment information. Feel free to leave questions blank and return to them later.
2. Use the “Learn More” tools to explore your learning style and record what you find out in the “My Journal” tool.
3. Get information about post-secondary educational or career opportunities (also available in the “Learn More” tools) and record what you find out in your journal.
4. Use the “My Journal” tool to record your feelings about your educational journey...Do you like your courses? Are there some things that you are struggling with more than others? How does your family feel about your return to school?
5. Use the “My Journal” tool to ask questions that you would like to have answered by your facilitator.
6. Record your learning (or other) successes on the “Celebrating Success” page.
7. Use the information entered on the “Setting Goals” and other pages to develop your personal “Action Plan.” These can be updated as frequently as you like. Once a goal has been accomplished, you might want to record it on the “Celebrate” page.
8. Arrange a meeting with your facilitator (either face-to-face or online using vClass) to discuss your learning plan.

Remember that this is your learning plan. Feel free to explore and experiment.

APPENDIX F

FINAL INTERVIEW QUESTIONS FOR LEARNERS

Overall, how do you feel about responding to or interacting with your facilitator to develop and update your learning plan?

What media did you use for interaction?

- Face-to-face
- Telephone
- vClass
- Other _____

Was the initial orientation to the learning plan sufficient to get you started?

What recommendations would you make to improve this in the future?

Please describe any barriers that prevented you from working on your learning plan.

What sections of the learning plan did you find most useful to you?

- Who Am I?
- Past Learning Experiences
- Future Learning Opportunities
- Career and Employment Information
- Setting Goals
- Celebrate Success!
- Learn more...about myself
- Learn more...about educational opportunities
- Learn more...about careers
- My Journal
- Action Plan

What sections of the learning plan did you find least useful to you?

- Who Am I?
- Past Learning Experiences
- Future Learning Opportunities
- Career and Employment Information
- Setting Goals
- Celebrate Success!
- Learn more...about myself
- Learn more...about educational opportunities
- Learn more...about careers
- My Journal
- Action Plan

How did you feel about sharing personal information with your facilitator?

Did you prefer to work on your learning plan without the assistance of the facilitator? Why or why not?

Do you feel that the learning plan helped you to achieve your immediate objective of completing your course(s) this term?

Was the learning plan helpful in developing a longer range educational plan? How?

How strong is your commitment to continuing in this program of study beyond your current course(s)?

Did you consider withdrawing at any time during the term?

What factors led to your decision to withdraw or continue?

Did you discuss your decision with anyone (spouse, facilitator, friend, fellow student)? How did this discussion affect your decision?

Will you continue to use the learning plan in the future? Why or why not?

APPENDIX G

FINAL INTERVIEW QUESTIONS FOR FACILITATORS

Overall, how did you feel about responding to or interacting with learners to develop and update their learning plans?

What media did you use for interaction?

- Face-to-face
- Telephone
- vClass
- Other _____

How well did these media work for this purpose?

What media would you prefer to use in the future?

- Face-to-face
- Telephone
- vClass
- Other _____

Why?

If you think you would approach an initial learning plan interaction differently next time, describe how and why you would go about it?

Did you feel adequately prepared for initiating learning plan dialogue? Why or why not?

What suggestions would you make for future preparation?

Please describe any barriers that prevented you from working with learners on development of their learning plans.

What sections of the learning plan did you find most useful to you as a facilitator?

- Who Am I?
- Past Learning Experiences
- Future Learning Opportunities
- Career and Employment Information
- Setting Goals
- Celebrate Success!
- Learn more...about myself
- Learn more...about educational opportunities
- Learn more...about careers
- My Journal
- Action Plan

What sections of the learning plan did you find least useful to you as a facilitator?

- Who Am I?
- Past Learning Experiences
- Future Learning Opportunities
- Career and Employment Information
- Setting Goals
- Celebrate Success!
- Learn more...about myself
- Learn more...about educational opportunities
- Learn more...about careers
- My Journal
- Action Plan

What sections do you think the learners found most useful?

- Who Am I?
- Past Learning Experiences
- Future Learning Opportunities
- Career and Employment Information
- Setting Goals
- Celebrate Success!
- Learn more...about myself
- Learn more...about educational opportunities
- Learn more...about careers
- My Journal
- Action Plan

What sections do you think the learners found least useful?

- Who Am I?
- Past Learning Experiences
- Future Learning Opportunities
- Career and Employment Information
- Setting Goals
- Celebrate Success!
- Learn more...about myself
- Learn more...about educational opportunities
- Learn more...about careers
- My Journal
- Action Plan

How do you think the learners felt about sharing personal information with you?

Do you think working on the learning plan had an influence on the learners' progress in their course work? Was this influence positive, negative, or neutral?

Are you aware of any of your learners who might have considered dropping out during the term?

Did they discuss this decision with you? What do you think encouraged them to persist?

Did any adult learners not participating in this research project withdraw from your program during this term?

Can you provide examples of the reasons given for withdrawal?

Of the total number of adults enrolled in your program on September 30, how many were still active in mid-December?

How many adults enrolled but didn't complete any assignments?

How many completed at least one assignment but stopped participating without giving a reason for doing so?

APPENDIX H

DATA CODING SAMPLES

Name	Nature of adults	Motivation/Persistence	Support	Interaction	Goal Setting
Arlene	Left school because she had no choice: had to work full time, lost study time, moved out on her own.	Strong commitment to completing high school because wants to graduate before her kids do. Did consider withdrawing due to course content requirements. Has attempted distance learning in past without success. Wants to get it done.	Discussed withdrawing with husband who talked her out of quitting a couple of times	Did not interact with facilitator after initial meeting re learning plan	Has always wanted to graduate. Wants to finish before her kids do. Doesn't want kids to use her not finishing as an excuse not to finish themselves.
Carol	Didn't find school interesting; life was more interesting. Not enough time because of other commitments (family, work, etc.)	Having trouble getting motivated to work on course due to changes in lifestyle Has not considered withdrawing	Wasn't given a copy of written learning plan and would like to meet to go over it		Wants a job that pays more than minimum wage. Not a lot of jobs without grade 12. Is a goal oriented person
Facilitator		Learning plan can be an "unobtrusive reminder to stay on track" with course work.		Telephone, email, vClass just getting started. Valuable to get together f2f occasionally Learners willing to share personal information because they already knew him and had a certain comfort level.	

Name	Goal Commitment	Self-concept
Kathy	Very strong commitment to continuing in program of study.	Some people can work well independently while others need an extra push. Tends to set goals to high and has a sense of failure when she doesn't achieve them. "Sense of accomplishment is like an addiction."
Justine	On a scale of 1 to 10, is about 7 "but going down steadily" Looking at other educational alternatives. Lives out of town and it isn't easy to come to the Centre; facilitators need to recognize this	Needs constant reassurance that she is on the right track and she will stop working if she isn't sure she is doing the right thing. "I want to do everything, but I need help!" Makes her feel frustrated when family and friends ask her "how is it going?" although they are supportive.
Facilitator	Would not have done the work anyway (not related to interaction with facilitator). Learner has good intentions but doesn't follow through.	Learner doesn't see herself as a successful learner.

Name	Technology	Learning Plan Design	Motivator
Arlene	Novice and experienced computer users should have no difficulty	Site is well laid out and easy to use	
Lynne	Couldn't access from home (wrong URL?)		
Kathy	Difficulty saving journal and action plan entries (time issue?)	Straightforward; easy to understand Some sections not applicable to her or not of interest to her but might be to others Easy to click on links to external sources of information	Getting info from ed and career links provided motivation for getting courses completed. Comments from facilitator can provide motivation (e.g., "how can I help you meet this goal") Could help learners achieve immediate objectives of course completion by encouraging them to set goals and feel accountable. "It is one thing to have goals in your mind, but another to have it on paper and see it in black and white." Provides motivation because "I know what I have to do." Goals can be reassessed so can gain a sense of achievement. Learning plan encourages long term goal setting (for example, by providing links to explore ed opportunities) Makes you think about what you want to do in 1 or 5 years from now and causes you to dwell on it. ...opens doors to the future. "Self talk" opportunities are valuable.