How Intentional Use of Self Can Help Create Successful Learning Experiences

# Introduction

Teachers of adults have as their core purpose bringing about learning so individuals can change in response to changes in environmental demands. In this, they share much with other change-facilitating professions. A review of the many professions who use learning as a means to bring about individual or group change include occupational therapy, social work, and organizational development.

All three of these professions have written about intentional use of self as a means for the therapist or consultant to bring about change in individuals and groups. This paper will explore the similarities in the research of all three fields and make some recommendations on how teachers of adults can use these concepts to create more successful learning experiences.

The objectives of this paper are to:

* Explain how helping professions, including organizational development, occupational therapy and social work use the concept of intentional use of self in their work
* Connect the concept of intentional use of self with adult learning theory
* Identify opportunities for choiceful behavior for teachers of adults

## Definitions

Taylor indicates that The American Occupational Therapy Association has defined therapeutic use of self as a “practitioner’s planned use of his or her personality, insights, perceptions and judgments as part of the therapeutic process.” (p 5)

According to Seashore, organizational development (OD) professionals can think about use of self as a way to “link the concepts of *self-awareness, perceptions, choices* and *actions* as the fundamental building blocks of our capacities to be effective agents of change…” (p.55)

In the field of social work, conscious use of self means “purposefully and intentionally using [the social worker’s] motivation and capacity to communicate and interact with others in ways that facilitate change.” (Heydt, p 25)

Intentional use of self has obvious implications for teachers of adults. The most obvious case is in the classroom where the teacher or facilitator must be constantly aware of her own feelings, and the reaction of the learners. However, at every stage, more intentional use of self can help the teacher of adults in all aspects of instructional design and delivery. In needs analysis, intentional use of self can help the instructional designer gather more valid information through focus groups and interviews. In the design phase, the concept can help instructional designers to interact more effectively with subject matter experts to fully understand content. Developers will be able to work more efficiently with others on the development team; and in the evaluation phase, advocates of the learning program will be better able to present results and work with decision makers to determine next steps.

## A Model for Teachers of Adults

We can envision the learning process as having four elements as displayed in Figure 1. This model is adapted from Taylor’s model of the Therapeutic Process. (p. 48) On the left side of the model are the tasks that need to be accomplished for learning to take place; these would include analysis of training needs data, creating design plans and deliverables, delivering content through lectures, etc. On the right are the relationship aspects of learning; among these would be establishing rapport with learners, listening to questions, tuning in to nonverbal cues. The most effective teachers of adults are able to keep both task and relationship goals in mind throughout the planning, delivery and evaluation of learning events.

All of the individuals – facilitators and learners - come to the learning environment as whole people with a set of personal characteristics. Some of these, such as level of current knowledge, interest and perceived relevance, are directly related to the training. Others are deeply rooted in past experiences, personality and level of emotional intelligence.



Figure : The Learning Process

A teacher of adults who uses the concept of intentional use of self will focus just as much on the relationship aspects of the learning event as on content. He or she will seek to understand his or her own characteristics as well as those of the learners, and will use this knowledge intentionally to attempt create a successful learning experience.

## Principles

In all the professions studied, several common principles of intentional use of self emerged. They are displayed in Figure 2.

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Figure : Principles of Intentional Use of Self

Self awareness is essential for intentional use of self, but not sufficient in itself. Exemplary facilitators are able to assess the learning situation by balancing the delivery of content with attending to the interpersonal aspects of the experience. They consider a wide range of possible behaviors and act deliberately rather than from habit.

Each of these principles will be discussed in greater detail in the remainder of this paper.

# Self Awareness

Self awareness is the foundational concept of use of self. Just as all craftspeople must know their tools, all musicians must know their instruments, all facilitators of individual change must first know themselves as an instrument of change, not only in the context of the current situation, but also in those enduring characteristics that may be hidden from themselves and others. Seashore (2004) indicates that intentional use of self “starts with our understanding of who we are, our conscious perception of our self…. and the unconscious…or out of awareness part of our self that is always along for the ride, and on many occasions is actually the driver.” In the Seashore model, the self includes intentions, styles, patterns, habits defenses and needs.

## Self Awareness Competencies in Emotional Intelligence

Adapting Goleman’s work on Emotional Intelligence, Cherniss and Adler (p. 10) identify three competencies that comprise self awareness. These are

* Emotional self-awareness: The ability to recognize one’s emotions and their effects
* Accurate self-assessment: Knowing one’s strengths and limits
* Self-confidence: A strong sense of one’s self-worth and capabilities.

### Emotional Self-Awareness

Building emotional self-awareness is a lifelong learning process. Bradberry and Greaves (p. 92) advise that it is essential to pay attention to the uncomfortable sensations that are indicative of an emotional reaction. Feeling hot or cold, tense or light-headed, a constricted throat or racing heart can indicate that emotions are aroused. Rather than ignoring these sensations, a facilitator using the self intentionally will identify the emotion and its intensity. Figure 3, adapted from Bradberry (p. 35), displays a range of five core emotions at various levels of intensity. People striving for self-awareness first determine which of the emotions they’re experiencing and at what level.

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| --- | --- | --- | --- | --- | --- |
|  | HAPPY  | SAD  | ANGRY  | AFRAID  | ASHAMED  |
| HIGH  | ElatedThrilledDelighted  | DepressedDejectedMiserable  | FuriousIrateEnraged  | TerrifiedHorrifiedPetrified  | HumiliatedWorthlessDisgraced |
| MODERATE  | CheerfulUpGood  | DistressedDownRegretful  | UpsetFrustratedAgitated  | ScaredUneasyFrightened  | ApologeticGuiltyEmbarrassed |
| MILD  | GladContentPleased  | BlueUnhappyMoody  | AnnoyedIrritatedPerturbed  | NervousWorriedTimid  | SorrySelf-consciousUncomfortable |

Figure : Emotions and intensity

Frequently, one emotion can be mistaken for another. For example, a feeling of tightness in the chest and shallow breathing could be mistaken as annoyance with a challenging participant, when in reality the true emotion is guilt about one’s own inadequate preparation.

Finally, it’s important to consider the source of the emotion; it may be arising from the current learning experience, or be a remnant of earlier, even childhood, experiences. McCormick advises consultants to “understand your common reactions and prejudices so you can reduce bias in your diagnosis.” In some cases, a “diagnostician’s feelings may have more to do with his or her past than the person (or organization) being diagnosed.” (p. 53)

### Accurate Self-assessment

Each of us has a concept of how we are at our core and how we appear to others. We know our intentions, but the perception of the impact of our actions on others can be inaccurate. Exceptional facilitators make the effort to continually assess their behavior both as a whole person and in the learning event itself.

Galbraith (2004) outlines a number of instruments that teachers of adults can use to better understand their philosophy and style. The Philosophy of Adult Education Inventory (PAEI) can help the facilitator understand the philosophical orientation that underlies his or her behavior. This understanding can help improve the quality of decisions made about design and delivery of training. The Principles of Adult Learning Scale (PALS) can help measure the degree of learner- or teacher-centered approach. Other instruments such as the DiSC and Myers-Briggs Type Indicator can enhance understanding of personal style and preferences.

Within each learning experience, teachers of adults can learn from Taylor’s advice (p.58) about ongoing critical awareness of their strengths and limits in several areas. While it may be challenging to attend to these factors during a learning event, facilitators can use feedback from a trusted colleague or audio or video recordings to help with self-assessment accuracy. A journal on interpersonal experiences kept after each training event can also be helpful. Some things to be mindful of include:

* Is the vocabulary appropriate for the audience?
* Are jargon and “loaded” words avoided?
* Are questions and input from participants encouraged?
* Is there evidence of active listening?
* Are tone of voice, facial expression, posture and gestures supportive of open communication?
* What emotions are being displayed?
* What is being withheld and why?

### Self Confidence

A facilitator who is intentionally using the self as an instrument of change would most likely project an aura of self assurance and presence. Cherniss cites numerous studies that indicate a strong relationship between self-confidence and performance. Hanson states that “When one feels good about oneself there is a greater inclination to treat incoming information more objectively and use it in a constructive way rather than defend against it, project it onto others, or reject it outright.” (p. 97)

# Situational Assessment

While self awareness is critical, it alone is not sufficient to practice intentional use of self. Skilled facilitators are constantly assessing the learning situation. They are able to use their social awareness to continuously attend to signals that indicate how the learners are responding to the experience.

Cherniss and Adler define social awareness as the “awareness of others’ feelings, needs and concerns.” (p.11). Empathy is the foundational competency for using social awareness to assess a learning situation. Facilitators who are strongly empathetic are able to sense and understand learners’ thoughts and feelings, even when they don’t agree with them. Taylor describes “mindful empathy” as “an objective mode of observation in which the therapist comes to feel and understand a client’s underlying emotions, needs and motives while at the same time maintaining an objective viewpoint.” (p. 60)

McCormick suggests that organizational development consultants can use one’s self intentionally in organizational diagnosis. He advises consultants to “pay attention to your emotional responses to an organization, and use them to create diagnostic hypotheses…Emotional responses, instead of interfering with diagnosis, become data that can improve it.” (p. 50) Once aware of an emotional response, a facilitator may be able to hypothesize that at least some of the learners are sharing the same response. For example, the teacher may be feeling impatient with a learner’s presentation that has veered away from the topic. Using the self as a diagnostic tool, the teacher may theorize that at least some of the other participants share that feeling and may chose to mention the feeling to see if others agree, take direct action to get the presentation back on course, provide indirect support for getting back on topic or just wait to see what happens.

# Making Choices

In order to use the self intentionally, a facilitator needs to use feedback from the self and others to constantly modify behavior. Seashore (2004) states: “The key to conscious, deliberate and intentional Use of the whole Self is to expand and develop the range of behavioral choices that are available to oneself for contributing towards the accomplishment of goals, particularly in increasingly stressful situations. This capacity to have a range of choices significantly reduces the negative effect of defensiveness or automatic “robotic” habitual behaviors that may or may not be appropriate in any given situation.” (p 59)

## Understanding Options

A teacher of adults wishing to use the self intentionally to create a successful learning experience needs to understand and be able to use a wide range of interpersonal behaviors. The Intentional Relationship Model (IRM) of occupational therapy (Taylor, 53) describes six therapeutic modes that the therapist can use when interacting with a client. Individual therapists may favor one or two modes that match their personality or personal style. Taylor indicates that the most successful therapists are the ones who can comfortably use any of the modes in order to help a specific client. The therapeutic modes are:

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| Advocating | Ensuring that the client’s rights are enforced and resources are secured. May require the therapist to serve as a mediator, facilitator, negotiator, enforcer, or other type of advocate with external persons or agencies. |
| Collaborating | Expecting the client to be an active and equal participant in therapy. Ensuring choice, freedom, and autonomy to the greatest extent possible. |
| Empathizing | Ongoing striving to understand the client’s thoughts, feelings, and behaviors while suspending any judgment. Ensuring that the client verifies and experiences the therapist’s understanding as truthful and validating. |
| Encouraging | Seizing the opportunity to instill hope in a client. Celebrating a client’s thinking or behavior through positive reinforcement. Conveying an attitude of joyfulness, playfulness, and confidence. |
| Instructing | Carefully structuring therapy activities and being explicit with the clients about the plan, sequence, and events of therapy. Providing clear instruction and feedback about performance. Setting limits on a client’s requests or behavior. |
| Problem-solving | Facilitating pragmatic thinking and solving dilemmas by outlining choices, posing strategic questions, and providing opportunities for comparative or analytical thinking. |

Figure 4: Occupational Therapy Therapeutic Modes

With the possible exception of advocating, these modes represent interaction options that would be available to the teacher of adults.

The range of interpersonal behaviors applicable to teachers of adults is quite large. Here are a few that have direct implications for intentional use of self.

Hackett (1997) describes two skills essential to create a climate of shared respect: Inquiry and Advocacy. Inquiry involves asking questions of others in a way that encourages them to truly speak up – advocate – for their point of view. For the facilitator using the self intentionally, this is not the cursory request for questions at the end of a learning unit. It requires a suspension of certainty that the facilitator is correct and a true curiosity about other perspectives.

Advocacy is a manner of expressing one’s thoughts and opinions in a way that is clear, but keeps the conversation open to dialog. One must be able to identify facts, beliefs and assumptions – both internally and to the others in the conversation. Both inquiry and advocacy require intention on the part of the speaker. Hackett suggests that the way to create shared respect is to “Inquire with the intent to encourage advocacy. Advocate with the intent to encourage inquiry.”

Hackett goes on to suggest that the mix and intensity of inquiry and advocacy will vary, depending on the level of emotion and trust in the situation.

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| --- | --- | --- |
| HighEmotion | “Undiscussables” live in this quadrant.Relationship is fragile.Invite input and propose tentatively. | This is the time to challenge and speak with passion. |
| Low Emotion | Gentle, tentative approach is appropriate.Ask and suggest. | Probe for information and state positions strongly. |
|  | Low Trust | High Trust |

Figure 5: Appropriate Styles of Inquiry and Advocacy

# Taking Intentional Action

Ultimately, the objective is to act in a way that will leverage this awareness of self and situation in order to create the experience that will facilitate the greatest learning. Just as occupational therapists need to select the treatment mode with the greatest likelihood of success with a given client, teachers of adults need to make a conscious choice among their available alternatives and act with the intention of facilitating learning.

This often means stepping outside the behaviors that may be most comfortable and trusted. As a means of self development, it may be helpful develop a matrix of challenging interpersonal situations the teacher may face and the alternative facilitator behaviors that might be most effective in those situations. Figure 6 presents an example. Considering in advance which actions are most likely to result in a desirable outcome may be helpful. The matrix could also be used as a self-evaluation and development planning tool after completion of a training event.

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|  | Facilitator Behavior Options |
| Event  | Inquiry | Advocacy | Collaborating | MindfulEmpathy | Encouraging | Instructing | Problem-solving |
| Argument among participants  | ✓ | ✓ | ✓ | ✓ |  | ✓ | ✓ |
| Excessive Self-Disclosures  |  |  |  | ✓ |  | ✓ | ✓ |
| Power Struggles | ✓ |  |  | ✓ |  | ✓ | ✓ |
| Nonverbal Cues of Resistance  | ✓ |  |  | ✓ | ✓ |  | ✓ |
| Overt Disruption | ✓ | ✓ | ✓ | ✓ |  |  | ✓ |
| Confusion about Content | ✓ |  |  | ✓ | ✓ | ✓ |  |

Figure 6: Facilitator Behavior Options

At the same time, the facilitator should be attuned to unintentional behaviors that he or she may exhibit unconsciously. Ingrained in personal style, one may use sarcasm rather than advocacy to state a point of view. A teacher unaccustomed to using mindful empathy may label participants rather than welcoming diversity or debate. Without self-confidence, avoidance, defensiveness and lecturing can take the place of higher level interpersonal skills.

# Implications

Teachers of adults, whether working as instructional designers, classroom trainers or online facilitators, can use the concept of intentional use of self to maximize their skills and effectiveness. The concept can help integrate adult learning theory, content knowledge and interpersonal skills into a framework that can inform one’s approach to individuals and groups throughout the instructional process from needs analysis to evaluation. Teachers who undertake the ongoing challenge of learning to use the self intentionally as a teacher will have infinite opportunities for their own growth.

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