

Don't They Know They are in Over Their Heads?

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Abstract: Using the Subject-Object Interview data was gathered to assess the meaning making framework underlying meaning construction by peer instructors in learning in retirement programs. Construction of the peer instructing experience was consistent with the potential depth and breadth of assessed meaning making capacity, but not the expectations of the role.

Learning in retirement programs (LRPs) are found on college and university campuses across the United States. Peer instruction is essential to the sustainability and vitality of these programs. Prior experience as an educator is not a prerequisite to serve as a peer instructor. Peer instructors are diverse in background and educational levels. Many are sharing knowledge acquired from a lifelong learning inquiry into music, art, literature, philosophy, etc.

LRP peer instructors exhibit the autonomy implicit to successful mastery of what Kegan (1994) describes as the hidden curriculum of the classroom where adult learners are expected to “take initiative; set our own goals and standards; use experts, institutions and other resources to pursue these goals; take responsibility for our direction and productivity in learning” (p. 303). These learning tasks require the developmental capacity of the self-authoring mind (Kegan, 1994, 2000). Although movement to the peer instructor role is observable, actions cannot be taken as evidence of *how* peer instructors know and construct the experience of moving into the peer instructor role.

Purpose of the Study

Using the Subject-Object Interview (SOI), an interview format designed to assess an individual's order of meaning construction (Lahey, Souvaine, Kegan, Goodman, & Felix, 1988), data was gathered and analyzed to answer and explore several questions, including: From what meaning-making epistemology within the Kegan framework are peer instructors constructing meaning? Essentially, what is the underlying framework of how the peer instructors are constructing their experiences as peer instructors?

Development, Meaning Making and Learning

Constructivists assume that knowing is an active process of constructing meaning, making sense or making meaning from experience. Kegan (1998) asserts, “reality doesn't happen up to us inherent in our experience. We construct the meaning or reality of our experience” (p. 198) and meaning is made in the space between an event and the person's reaction to it (Kegan, 1982). Meaning construction is influenced by epistemic assumptions, prior experience and current experience. When development is defined within the constructivist framework, both meaning making and the underlying system of meaning making are assumed to become increasingly complex. King and Baxter Magolda (1996) draw attention to “a key insight from the developmental perspective—that people not only *organize* but *reorganize* what and how they know, and that process of reorganizing affects what and how they learn” (p. 165).

Kegan's Theory of the Evolving Self

Kegan has placed these reorganizations on a developmental continuum asserting that “these are qualitative complexifications of the mind. They are not compensatory strategies that enable one to get more out of the same mental equipment; they are actual upgrading transformations of the equipment itself” (1998, p. 208). Kegan proposes and describes differences in the meaning making capacity of individuals as they move, starting at birth, through what he describes as subject-object balances. Each reorganization or movement to a new subject-object balance increases the capacity and, thus, the potential for expanding what an individual can or cannot know, the responsibility held by the self for meaning construction and the psychological processes owned by the self (Lahey, Souvaine, Kegan, Goodman, & Felix, 1988).

Kegan (1994) has formulated five orders of meaning construction or, more recently (2000), epistemologies in his theory. Each order provides both potential and limits to the complexity with which one may understand experience and subsequently the meaning constructed out of that experience. Although Kegan attaches no corresponding ages to his orders, three orders are associated with the adult years: the third order designated the socialized self; the fourth order designated the self-authored self; and, the fifth order designated the self-transformed self. Essentially, because of the potential and the limits of each meaning making order, the individual interacting with the world from the perspective of the socialized knower sees, feels and experiences a different relationship with the world than the individual seeing, feeling, and experiencing his relationship to the world from the perspective of the self-authorized knower.

Individuals construct meaning of their experiences, but their development occurs in a social context, for “however idiosyncratic our individual constructions of experience might be, the culture at large, or the culture’s “discourse shapers” and knowledge communities, also participate in forming a public construction, even an expectation of how common circumstances will be commonly experienced” (Kegan, 1998, p. 199). These expectations or claims on the minds of individuals, according to Kegan, are the *hidden curriculums* of modern life (1994).

The Demands of the Curriculum

Utilizing the curriculum analogy, Kegan (1994) explores the demands of the various contexts of adulthood: partnering, parenting, work and school and concludes that the activities of contemporary adulthood present “expectations, prescriptions, claims and demands” (p. 5) requiring capacities congruent with the developmental capacity of the self-authoring mind for organizing and constructing experiences.

Kegan’s analysis of the hidden curriculums for senior citizens (1998) and for adult students (1994) is the most relevant for this study. Kegan (1998) identifies two “public stories” for the elderly and two sets of curricular expectations: degenerative disengagement or transformative disengagement. The degenerative disengagement story paints an expectation of inevitable decline with no further growth. The transformative story is one of a flowering of abilities and opportunities for self-development. He suggests that neither of these “narratives of expectations” for old age match epistemological realities, one view aiming too high (self-transforming) and the other too low (socialized). Kegan speculates that self-authoring knowing may be the mental threshold required for meeting the contemporary curricular demands of old age, but many will not be at this level.

Claims for self-authoring knowing and meaning construction are also made in the educational context, as adult students are expected to: think critically; examine self, culture and

context in order to own and author feelings, values and needs; be a self-directed learner; understand the self as co-creator of culture; read actively for their own purpose; be self-reflective; and take charge of concepts and theories of a course or discipline (Kegan, 1994). There are two dimensions (1994) to the self-direction expected of adult learners. The first is described as personal responsibility for learning, basically being responsible for setting goals, obtaining resources to achieve goals, completing homework, and attending class. The second set of expectations requires mastery of the discipline's knowledge generation and validation processes.

Limitations of the Kegan Scheme

Kegan's theory was first published in 1982 building on ideas formulated in his 1977 dissertation. A number of dissertations, primarily done by Harvard students, have used the Subject-Object Interview designed by Kegan and his associates to assess an individual's subject-object balance. But, few have published their results beyond the dissertation stage. Reviewing the empirical data from studies that have utilized his subject-object interview, Kegan (1998) indicates that about half of 'socially favored' individuals (well-educated, professionals, middle class) do not construct experience as self-authorized knowers. When studies of a broader, more general population are included in his review, only about one-fourth of the individuals construct experience from the perspective of the self-authoring mind. The self-transforming system is rare, not occurring before mid-life. In all studies he reviewed (1998) using his subject-object interview, participants were under the age of 50. Kegan (1998) acknowledges that he is aware of no studies using his subject-object interview instrument to examine meaning making in old age.

Research Design

The Subject-Objective Interview (SOI) protocol was used to gather data for assessing the meaning-making epistemology of each peer instructor in part one of this study. Kegan describes the SOI as "far more systematic and uniform (in its administration), and intersubjective (in its assessment), and even number-oriented (in its outcome) than most 'qualitative research,' and yet it is not, strictly speaking, a 'quantitative' methodology" (R. Kegan, personal correspondence, September 1, 2006). It may best be described as a mixed method combining a uniformly administered qualitative interview with an inter-rater reliable assessment procedure.

Twenty peer instructors, 10 men and 10 women, ages 57 years to 79 years, were recruited from three LRPs in the Northeast. The LRP course(s) they taught had a disciplinary base and the content was not related to their pre-retirement career. They did not hold academic degrees in the discipline of their course topics and none had previous experience as a professional educator.

To start the interview, the interviewer presents the participant with 10 prompt cards: sad, angry, torn, conviction, success, change, anxious, important to me, lost something, and moved or touched. The participant is invited to choose one to discuss. The content of the SOI interview is determined by the participant. The interviewer's task in the SOI is to ask questions that elicit evidence of the organizing principles guiding the individual's meaning construction or meaning forming. Questions that begin with "why" are particularly effective in probing for evidence (Lahey et al., 1988) of the principles guiding meaning construction as the individual explains how he understands a particular experience or feeling.

Individuals are given opportunities to demonstrate the highest order or subject-object balance from which they are constructing meaning. The subject-object balances provide both capacity and limitations on meaning construction. Despite opportunities to do so, individuals

cannot implement the rules or the principles for constructing meaning at a level higher than the subject in which they are embedded. An SOI score is ascribed to an interview based on evidence of the individual's structure of meaning-making as bounded by their dominant subject-object balance and based upon the highest, sustained level of meaning construction demonstrated.

The 20 SOI interviews were taped and transcribed. Peer instructors were asked to hold their experiences as peer instructors in mind as they viewed, reviewed, and chose prompt cards to discuss. The meaning-making systems are considered to be domain general (Souvaine, Lahey, & Kegan, 1990): the order underlying meaning construction is the same regardless of the context. Thus, bracketing of the content of the interview to the context of peer instructing would not adversely affect the reliability of the SOI interview and the subsequent scoring of the transcript. Interviews ranged in length from 60 to 120 minutes.

The transcripts were scored by the researcher and then scored a second time, in a check for reliability, by an experienced, certified SOI rater. This second rater trained with Kegan at the Harvard Graduate School of Education. For over 15 years, she has taught both the theory and the methodology of subject-object psychology and provided consultation to individuals and groups on its applications. There was agreement on the assessed scores for all interviews.

Findings

It was expected that all peer instructors in the study would be assessed as constructing meaning from the self-authoring epistemology. The majority of the study participants (65%) were assessed as constructing meaning from the self-authorizing self-system (SOI Score 4) of meaning-making capacity. The socialized self-system (SOI Score 3) was dominant in meaning construction among the remaining participants (35%). Assessed levels of meaning construction for this latter group of peer instructors ranged from 3/2 to 3/4. This indicates that the instrumental self-system (SOI Score 2) and self-authorizing self-system (SOI Score 4), although present in meaning construction, were not dominant.

Within the Kegan model, peer instructors assessed with an SOI score of 4 demonstrated in the interview the characteristics of meaning making from the perspective of the self-authorized knower: take responsibility for feelings, set personal boundaries, generate theories for being, own their decisions and actions, and are clear about who they are and what they value. A peer instructor assessed an SOI score of 3 demonstrates the meaning making characteristics of the socialized knower: "think abstractly, construct values and ideals, introspect, subordinate his short term interests to the welfare of the relationship, and orient to and identify with the expectations of those social groups and interpersonal relations of which he wishes to feel himself a part" (Kegan, 2000, p. 61).

Peer instructors demonstrated differences in the breadth and depth of their understanding, engagement, and theorizing about assuming the role of peer instructor and peer instructing consistent with Kegan's assertion of greater complexity and increasing autonomy in meaning construction resulting from the evolution from socialized knowing to self-authorized knowing. For example, one peer instructor (SOI 3) was asked, "If you were preparing an orientation session for peer moderators what kinds of recommendations would you make to them on how to be a good moderator, do you think?" (Interview J-10, 2001, Lines 122-123). The peer instructor responded:

I don't know that I know how to be good. Except, I mean, that with some people. . . it almost seems like a given with some people. . . uh. . . really have presence and in particular, if it is a particular subject, we have some resources, but actually I've

never prepared on a subject they are working with. It's kind of easy to critique certain ones, but I don't know that I would have any real ideas for helping someone be a better moderator. It seems that so much of it is inborn. (lines 125-129)

Another peer instructor, this time a peer instructor whose interview was scored at the self-authorizing fourth order (SOI 4), was asked a similar question: "If not the expertise, what are the important qualifications, what are the important qualifications to be a peer facilitator?" (Interview E-5, 2001, lines 437-438). She responded:

Ummm. I think it is the ability to listen, the ability to answer questions, an ability to not dominate, to (not) throw out your opinion as the only valid opinion. Umm, to recognize the dynamics of the group and facilitate the overall learning experience, not just for your own benefit. (2001, Lines 440-442).

The points for comparison of the content of the interviews between peer instructors are limited. But, the limited data suggest that individuals constructing meaning from different subject-object balances engage, organize, and construct meaning of peer instructing experiences differently, but in ways consistent with the potentials and constraints each balance provides for what the individual can or cannot know, the responsibility taken and held by the self for meaning construction, and the psychological processes owned by the self.

Discussion

The SOI scores suggest that meaning-making capacity may or may not be a prerequisite or predictor for entering a particular educational setting or experience. Peer instructors placed themselves in the LRP context as part of resolving the dilemma of retirement as they had constructed it. Peer instructing is a voluntary role, easily left if individuals experience a mismatch between their meaning making and the expectations of the program environment and find themselves "in over their heads." One premise of Kegan's work is that adult learners are over their heads in meeting the demands of the classroom. Although he has delineated academic expectations, he has not fully examined the motivations of adult learners, constructed within their meaning-making capacity for voluntarily entering the learning environment. The LRP classroom may be satisfying their needs as they construct them.

Among this sample population several peer instructors did indicate that taking on the role served a purpose for them. These purposes included: maintaining their mental functioning (Interview L-12); scaffolding continued learning or development (Interviews K-11; R-19); or engaging with others they perceived to be like themselves (Interviews N-15; P-17). The informational and experiential knowledge levels of peers were perceived as valuable, interesting, and important components to the social element in the LRP programs.

At the outset of this study, it was assumed that all of the peer instructors would be assessed as self-authorized knowers and it was assumed that effective peer instructing would require self-authorized knowing. Yet, the construction of the role and the expectations of the experience are constructed from within one's meaning making framework. There is no formal job description for the peer instructor position, nor is there a supervisor delineating the expectations of the position. It is not a role expected of one in late adulthood. There is no hidden curriculum (Kegan, 1994) clearly delineated for older adulthood that requires that one continue to learn or teach one's peers. Individuals at differing frames of meaning construction could be said to be free to construct their own expectations of the voluntary peer instructor role. Thus, individuals in this voluntary role may not feel in "over their heads" (Kegan, 1994) or feel the tension of a mismatch

between demands and one's meaning making frame. One cannot know what one cannot know. In other words, one's order of meaning construction brackets or bounds meaning construction of the environment one has voluntarily chosen to enter, one's motivation to enter, and one's decision to stay in the environment. The peer instructors may have assessed their ability and interest in assuming the role of peer instructing and constructed their own expectations of the role from within their current meaning-making order and found a fit.

Knowing and Expectations: A Two Way Street

Kegan's (1994) delineation of the expectations of adulthood led him to speculate that adult students may find themselves in over their heads as expectations may exceed their capacity for meaning construction (1994). But, are students always in over their heads? Or, are they in over their head only when they encounter individuals whose order of meaning construction is more complex than their own? What happens when learners encounter others who are constructing meaning from a less complex order? Throughout the examples given in Kegan's work (1994) is a, seemingly, unquestioned assumption that bosses, parents, or teachers will be constructing meaning in a more complex manner than employees, children, or students. Is a match between the meaning making frames of learner and adult educator necessary for a positive learning experience?

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