

# Concept summary

Organizing concept of  
learning & the zones  
of proximal and distal  
development

Reconceptualized as the  
context of learning

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## Introduction to the concept of the organizing circumstance of learning

The concept of the organizing circumstance derived from the literature on self-directed learning, proposing that “environmental determinants” operated as fortuitous conditions (Spear & Mocker, 1984). This concept challenged the view of adult learners as pro-active in planning their self-regulated learning experiences to achieve specific outcomes, instead viewing the circumstances as driving the direction, methods and scope of learning (see Closson, 1996; Rager, 2003). However, the organizing circumstance of learning as re-conceptualized (Spear Ellinwood, 2011), redefines the context as the totality of circumstances evidencing a deliberate, dynamic relation between the learner and their goals, the demands of the learning situation, and the resources and goals for learning.

Spear and Mocker (1984) observed seventy-eight adult learners investigating a wide variety of topics including child rearing, consumer education, and personal health, and concluded that these otherwise self-directed learners did not seem to construct a purposeful search for knowledge or skill, but rather relied on the fortuitous availability of resources in their environment. These “environmental determinants” were characterized as the organizing circumstance of learning:

*(a) a change in life circumstances is the trigger event for a learning project; (b) the changed circumstances provide few attractive resources for learning; and (c) the structure, methods, resources, and conditions for learning are provided by the circumstances (Spear & Mocker, 5).*

Subsequent studies persisted in this interpretation of the organizing circumstance as fortuitous or fateful environmental determinants (Closson, 1996; Garrison, 1997; Rager, 2006, 2009). The *trigger event* involving a change in life circumstances as the prime motivation for learning continues to be viewed as an environmental determinant in studies of informal, self-directed learning (van Eekelen, et al 2005; Kungu, 2011). Hiemstra (1994) asserted, without much discussion, that “Spear and Mocker's (1984) work on organizing circumstances showed how important it is to understand a learner's environmental circumstances in promoting self-directed learning” but did not suggest how to methodologically define those circumstances in relation to the learner.

Livingstone (2000) was the first, it seems, to have interpreted the so-called trigger event in a way that more closely resembles the term “leading activity” in cultural historical activity theory (see Cole, 2006). In his study of Canadians returning to adult educational activities in response

to a sluggish economy, Livingstone recognized that “adulthood is probably the period of most intense and extensive new ‘organizing circumstances’ (citing Spear, 1998). Redding (2000) similarly noted that the driving force in the self-directed learning of radio operators consisted of:

*“organizing circumstances that triggered their impetus to apply themselves to the task of learning new technology as a way to gain mastery over their environment, communicate, discover faraway places, and be of service to their community” (Redding, p.6).*

In their application of the organizing circumstance, Livingstone (2000) and Redding (2000) stressed the importance of social interaction, various environmental influences, and the impact of embarking on new leading activities in critical life periods, but they did not offer an integrative or methodological approach to the concept that would make it generally useful in education research. In sum, viewing such interaction from the perspective of fortuitous environmental determinants fails to address the active participation of the learner or the funds of knowledge she or he brings to the experience.

While medical school would seem to be a trigger or life-changing event – increasing expectations for personal, professional and academic achievement, medical students do not have to depend upon resources fortuitously available to them. As active learners, medical students can and should search for or generate resources and develop skills with the intent to enhance their content and procedural knowledge in a deliberate attempt to graduate and become practicing physicians. In short, they should set out to become – we should guide them in becoming, self-regulated, lifelong learners.

### **Redefining the context of learning as *the totality of circumstances***

Typically, the context of learning is defined as environment, something we imagine external to and distinct from the learner, akin to backdrop rather than as dynamically integrated (Cole, 1996). We can redefine this concept of the organizing circumstance of learning to establish the context of learning as a set of circumstances that establish a dynamic relationship between learner and resources. A cultural historical view considers the “complex interdependence” of the “physical, technological, socioeconomical, and intellectual environments” (van der Veer, p. 21), as the context of learning. Taking an expanded view of the organizing circumstance avoids the false characterization of context as that which *surrounds* us, as circumstances isolated from learners (Cole, 1996).

Thus, the re-conceptualized organizing circumstance has a two-fold function – to situate as well as mediate learning in the totality of circumstances that comprise the learning experience or situation. The following circumstances should be considered as playing a dynamic role in organizing the learning experience:

- (1) conditions for learning (the affordances and constraints of the learning landscape);
- (2) purpose or motivation of learning;
- (3) funds of knowledge for learning (those available and accessible to the learner including the learner’s practices); and
- (4) learning demands of the situation (proximity of the object, whether it is distal or proximal) (Spear-Ellinwood, 2011).

This re-conceptualization reminds us that there is no static or “objective environment” (van der Veer 2007, p. 21), and that learners and educators play a formidable role in shaping the learning experience. This re-conceptualization also avoids a mechanized application of Vygotsky’s zone of proximal development (ZPD) – the educational framework for a developmental curriculum.

### **What is the zone of proximal development?**

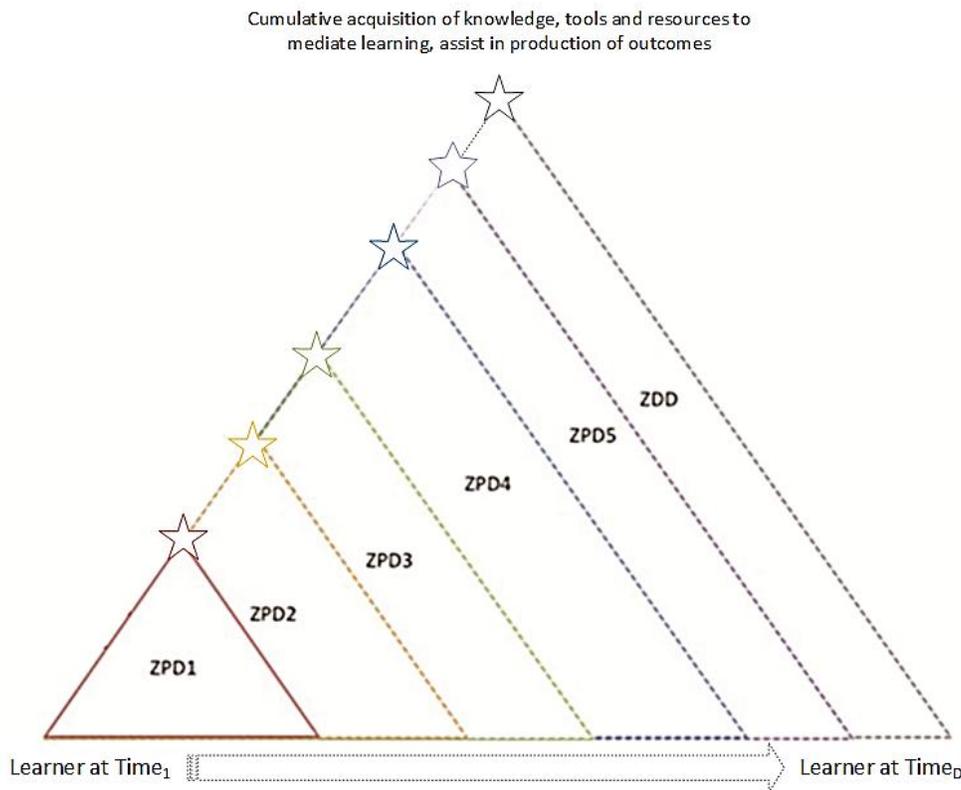
The zone of proximal development (ZPD) is defined by the distance between what the learner can do without assistance and what the learner can achieve with assistance from an instructor or more expert peer (Moll, 2013). Learning is mediated in the ZPD by the use of tools and resources, including peers and instructors. The vast literature interpreting Vygotsky’s work advises that the ZPD is informed by *the totality of circumstances*<sup>1</sup>, thus we are directed to consider a more dynamic relation between learner, instructor, environment and the tools and resources they use and generate.

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<sup>1</sup> The term is borrowed from the legal concept designed as a dynamic standard in determining probable cause (Illinois v. Gates, 462 U.S. 213, 1983).

### What about a zone of distal development?

Not all of goals are proximal. The ZPD, then, must be characterized as the immediate learning environment, one that is part of a broader and more time-consuming process – the zone of distal development (Spear-Ellinwood, 2011). The ZDD is a series of ZPDs. Progressing through each successive ZPD, the learner builds on the knowledge and skill acquired in previous ZPDs, working toward achieving the distal goal. Through this effort the distal object becomes proximal (Figure, below).



**Figure 1.** The zone of distal development; adapted from depiction of ZDD Spear-Ellinwood (2011).

Successful achievement of the intermediate objects of learning involves the *ratchet effect*, that is, “the accumulation of cultural knowledge and acquisition of cultural practices” through experience (Tomasello, 1999). The psychological tools and funds of knowledge generated through these intermediate zones of development become part of the learner’s toolkit for future experiences.

While this idea of building on and accumulating prior funds of knowledge through activity and experience is nothing new (Cole, 1996; Garrison, 1997; Moll, 2013), characterizing a zone of development as distal encourages both learner and instructor to plan a pathway from the initial

proximal object to the distal one. Furthermore, the act of engaging deliberately in such planning promotes reflection for learning/teaching and should stimulate reflective engagement in the process of and on the outcome of learning/teaching (Plack & Santasier, 2005; 2004). Thus, keeping the distal goal in mind may promote the learner's metacognitive or reflective engagement in the learning process (Spear-Ellinwood, 2011; Coutinho & Neuman, 2008).

### **Self-regulated learning is a distal object**

The task of becoming an independent or self-regulated learner is an example of a distal object. Students begin their educational careers as instructor-dependent. The ultimate goal of becoming a lifelong learner means the instructor-dependent learner must become a self-regulated one. Thus, the learner must *create* as well as *take advantage* of circumstances, while the instructor provides strategic guidance to assist the learner in developing such independence. To be competent in any profession, including law or medicine, practitioners must learn how to learn.

Becoming a physician is another example of a distal goal. Medical practice, then, requires complex skill and knowledge as well as study for protracted time. Once they leave the educational institution, physicians, for example, must determine what they know, what they need to know and how they ought to locate and apply knowledge. Medical students and educators must work in concert to co-construct this zone of distal development, that is, a series of zones of proximal development that facilitate the ratchet effect so the learner may acquire knowledge and skills to move toward mastery.

### **Applying the organizing circumstance to instructor-led learning**

When applying the organizing circumstance to instructor-directed learning situations, which dominate the early educational process of any professional, each of the four factors of the organizing circumstance of learning should consider the educator as much as the learner. The circumstance *learning demands*, for example, must contemplate the complementary factor of demands upon the instructor to teach, mentor, facilitate and guide the learner. *Funds of knowledge for learning* must identify simultaneously the funds of knowledge for teaching, a concept pioneered at the University of Arizona by Moll and Greenberg (1990) and amplified by Gonzales, Moll & Amanti (2005) and many others. The educator's funds of knowledge should be aligned with the demands placed upon the learner to result in effective teaching. Thus educator funds of knowledge provide support for teaching and learning.

The *proximity of learning objects* (goals) also contemplate the educator's competence to teach just as the *educator's motivation and purpose* affects and should align with learner motivation

and purpose.

### Conclusion

Thus, educators should concentrate their efforts on examining the totality of circumstances to place the learner as well as the teacher as complementarities at the center of the analysis.

Discovering the variation among learners' practices and the breadth and depth of the classroom community funds of knowledge may assist the instructor in designing the learning situation to overcome individual constraints on learning, or transform technologies into affordances for learning. Educators may use the concept of the organizing circumstance as a methodological approach to evaluate the context of learning to plan for and guide learners in bringing distal objects of learning within reach.

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