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Junior High Educators' Lived Experiences of Self-directed Learning for Teaching Online in 2020

April Vay Madsen
Walden University

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Walden University

College of Psychology and Community Services

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April Vay Madsen

has been found to be complete and satisfactory in all respects,
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the review committee have been made.

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Walden University
2025

Abstract

Junior High Educators' Lived Experiences of Self-directed Learning for Teaching Online

in 2020

by

April Vay Madsen

MS, Argosy University, 2014

BS, Brigham Young University, 2009

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Psychology

Walden University

February 2025

Abstract

Researchers have identified common educator challenges in switching from face-to-face to online teaching, including time management, course content, communication, and the use of technology effectively. There is little or no research on the lived experiences of junior high school educators who applied self-directed learning skills to adapt to the changes in educational formats from March 2020 to September 2020. This qualitative study aimed to explore these experiences as educators transitioned to online teaching due to the COVID-19 pandemic. Mezirow's transformational learning theory and Knowles et al.'s adult learning assumptions are used as the theoretical and conceptual frameworks, respectively. Giorgi's descriptive phenomenology was used to look at the experiences of six junior high teachers from the western United States. Data from semi structured interviews over Zoom were analyzed using phenomenological reduction. Findings revealed that educators applied adult learning skills primarily to meet students' needs, rather than for personal development. This suggests that learning for others was a key motivator in adapting to online methods. Additionally, the study found that individual strengths and weaknesses in learning development varied among educators. These insights can help educational leaders refine professional development resources to better foster self-direction in teaching, ultimately improving learning outcomes and contributing to positive social change for both teachers and students.

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Dedication

This work is dedicated to my Heavenly Father, for it was His guidance that led me to get my doctorate in the first place, and helped me to identify and refine my topic. I hope this work is Good and contributes to improvement in learning development practices for adults and those they teach.

Acknowledgments

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Chapter 1: Introduction to the Study

Introduction

School shutdowns for K–12 face-to-face teaching institutions due to the Coronavirus Pandemic were announced in the United States in March 2020 for the safety of faculty, staff, and students; many schools stayed closed through May 2020 and transitioned to online teaching (Bonds et al., 2021; Jaggars, 2021; Marcum-Dietrich et al., 2022; Shami-Iyabo Mitchell, 2020) to finish the 2020 academic year. Educators teaching in all grade levels had to make changes from face-to-face learning to online learning due to social distancing requirements in 2020 (Dinh & Nguyen, 2020). While instructions for the transition were generally provided (Pinter, 2020), teachers often needed to revise their courses and develop new teaching strategies.

The purpose of this qualitative study is to explore and describe the lived experience of junior high school educators' self-directed learning in preparation for the online teaching requirements of the 2020–2021 school year, specifically from March 2020 to September 2020. It is expected that adult learners should have the skills necessary to be active in their ongoing education, according to Franco (2019), by taking the initiative and bridging gaps in their education based on their career needs or personal growth needs. This capacity held by adult learners is called self-directed learning (Gradišek & Polak, 2021; Knowles et al., 2015). Understanding teachers' perceptions of how they used self-directed learning may influence how future learning format transitions are implemented. Findings from this study may contribute to the fields of psychology and

teaching by providing the personal insights of teachers to improve professional development training to meet individualized needs.

This chapter covers the background context of the problem and adult learning theories, especially self-directed learning principles. The problem is described, the purpose of the study is presented, and the research question is proposed. The theoretical framework is also introduced, and the nature of the study is described. Specific terms are then defined, and the research assumptions are laid out; the scope, delimitations, and limitations of the study are described. A statement about the potential significance of this study and a summary will conclude this chapter.

Background

In early 2020, educators were required to change their teaching format from face-to-face to online quickly due to a global pandemic (Jaggars, 2021), which impacted more than 1 billion learners worldwide (Marcum-Dietrich et al., 2022). Schools in the United States were officially closed by the end of March 2020 (Mullen & Badger, 2023; Shami-Iyabo Mitchell, 2020). Educators and students from the lowest educational grade to the highest were unprepared for the sudden changes (Gradišek & Polak, 2021) to online learning. For example, schools in Hawaii provided enrichment activities for learning until the end of the 2019/2020 school year (Miyashiro, 2023). However, little direction was provided for middle school teachers on preparing for the transition to online teaching in the Fall of 2020 was offered over the summer until some training was available two weeks before students were to return to school (Miyashiro, 2023). The beginning of

school was delayed due to implementing these required changes because of the pandemic (Miyashiro, 2023).

With a lack of direction, educators needed to act as learners themselves as they prepared for teaching online. Teachers were expected to transition to online teaching quickly while learning how to use an online platform and manage the pandemic crisis in their personal lives (Nadeem et al., 2022). While part of a teacher's employment and professional development is to learn the curriculum material themselves and then create the conditions to facilitate the learning of their students (Arghode et al., 2017a), it is unclear whether junior high teachers in the United States had sufficient technological training to successfully transition to online teaching during 2020, especially as the changes came with little to no prior training (Marcum-Dietrich et al., 2022; Miyashiro, 2023).

Technology in face-to-face education before the pandemic had often been used to supplement lessons instead of being the primary mode for sharing learning materials. The transition from face-to-face to online learning in 2020 meant that every teacher and student would require access to technology for learning. Instructors would need to learn how to hold classes in an online format and adjust the curriculum to meet the requirements of safety in 2020 (Gacs et al., 2020; Peimani et al., 2021; Rabaglietti et al., 2021). Access to the technology used in education and the knowledge of how to use this technology was not always readily available, despite the topic of technology in the classroom being available in continuing education courses for teachers since the 2000s (Volery, 2001). According to Fujita et al. (2021), only a small number of school teachers

in Japan, one of the most technologically advanced countries in the world, had experience with online teaching; online teaching was mostly supplemental, and the service was typically provided by specialists.

Siefert et al. (2019) discovered as recently as 2018 that educators continued to struggle to be comfortable with technology and reported that their beliefs about the usefulness of technology and their belief that they did not have enough time to feel competent using technology before applying it in the classroom may be barriers to effective online teaching. Safta-Zecheria et al. (2020) identified similar barriers to teachers accessing online tools effectively: (1) the challenges of physical distancing measures, (2) the timeframe of online teaching experiences, (3) online teaching methods, (4) classroom management, and (5) learning and professional development. The study discussed by Siefert et al. (2019) showed that professional development for educators continued to be deficient in helping educators be comfortable with technology and the know-how to implement it more substantially as a teaching medium effectively. Mullen and Badger (2023) offered that insufficient professional development could lead to decreased confidence in junior high educators as they changed to online learning during 2020. However, Teng and Wu (2021) discovered that years of experience teaching or experience with technology may have contributed to the success of educators during the pandemic of 2020.

Safta-Zecheria et al. (2020) and Rabaglietti et al. (2021) found that during the pandemic, instructors often had to use their personal technology and demonstrated that educators were not always proficient in using the technology effectively, and had the

additional challenge of making sure their students had access to and competence with learning technologies. Segal and Heath (2020) discovered that there was ongoing confusion by new teachers who were also in school to finish their teaching degrees about how to combine the technology that they were learning with the content they needed to teach their courses, and that technology-focused professional development had not been based in learning theories.

There is considerable quantitative research about the transition to online learning in early 2020 worldwide. Most research about online teaching focuses on higher education levels rather than K through 12 (Bishop-Monroe, 2020; Jaggars, 2021; Kebritchi et al., 2017). However, junior high school educators had to face the same challenges learning how to use technology more effectively to share learning materials, engage students in the learning process, and manage personal barriers if they arose during this time. The available research about the junior high level of education has mostly focused on the students in terms of access to resources, engagement, and practical issues (Chen & Meng, 2021; Dinh & Nguyen, 2020; Dockter, 2016). Teachers have been concerned about students and their well-being and ability to access learning materials (Jaggars, 2021; Nadeem et al., 2022). For example, some junior high teachers had concerns about increased absenteeism due to their student's lack of technology access (Nadeem et al., 2022), and K–12 teachers were concerned about rebuilding caring relationships with their students when they moved online (Jaggars, 2021). As noted above, during the transition, educators needed to be learners themselves while guiding students in using online learning platforms. This called for self-directed learning efforts.

Self-directed learning, or andragogy (the learning of adults), is defined as a person's ability to engage in learning with minimal to no prompts from an instructor (Knowles et al., 2015). Self-directed learning has been found to have two primary functions: personal and professional (Callan & Shim, 2019). Knowles' definition of self-directed learning is related to the learner's goals. According to Bordonaro (2020), self-directed learning is individual and collective. While teachers at all levels around the world are expected to be able to employ adult learning skills, there is little current research on how educators used self-directed learning skills to transition to online learning in 2020 in the United States. More studies about self-directed learning and the transition to online learning are found internationally in countries such as Indonesia (Audah, 2021; Ramdhani & Kholidi, 2021), Mexico and Jordan (Jaggars, 2021), and Japan (Fujita et al., 2021). Even in these studies, the focus is rarely on teachers at the equivalent level of junior high school teachers in the United States.

Adult learning theories are based on the premise that education for adults is most successful when based on the adult learners' needs (Abdul Aziz et al., 2014; Knowles et al., 2015). While many recent studies have focused on adult students (often defined as those who attend a higher education institution), it is important to note that educators are also adult learners. Wlodkowski and Ginsberg (2017) stated that adult learners "use attention, concentration, imagination, passion, and other processes to [purposefully] pursue goals" (p. 3). Few studies on professional development show the importance of the learning process for adults, even if they later apply those skills and experiences in a professional setting. While researchers like Bishop-Monroe (2020) stated that educators

are often motivated by making sure their students are taken care of, their research does not highlight how an educator used their own skills and learning to overcome challenges, such as the sudden change in educational formats in 2020. This is especially important because internal motivation for learning in adult learners is seen as an individual endeavor (Wlodkowski & Ginsberg, 2017). Additionally, Callan and Shim (2019) report there is some confusion about the meaning and application of self-directed learning—a lack in the research that this study is designed to explore. It is assumed that educators are able to use self-directed learning skills and be self-reflective in the process of meaning-making because they are adult learners and this skill is developmentally appropriate (Chen, 2023; Kjellström & Stålné, 2017). Recent statistics have also shown that lesson studies (a part of professional development for educators) include active teacher participation and that there is a positive correlation between an instructor's positive attitude and their level of participation (Jhang, 2020). Alshaikhi (2020) stated that educators can access self-directed learning skills by seeking resources beyond their institutions, networking, reflecting, and using technology to help them enhance their teaching skills.

Before COVID-19 there was a move in education toward more student-centered and student-driven learning (Netcoh & Bishop, 2017); however, this was not universal in the United States. In the program discussed by Netcoh and Bishop (2017), teachers could have personalized instruction on student-centered learning but were challenged to help students meet their deadlines (Netcoh & Bishop, 2017). While some instructors were able to make the transition to online learning smoothly due to their years of experience and

competency with technology-based learning (Sawyer et al., 2022), most instructors were unable to present or be present with their students with the same level of competence and self-efficacy (Fujita et al., 2021; Rabaglietti et al., 2021). College professors reported decreased self-efficacy as they worried about health concerns for themselves and their students and needed to change their teaching style from a more social interactive environment to one more focused on self-directed learning with access to resources and reflections (Gradišek & Polak, 2021). Self-efficacy itself can be improved depending on the learner's beliefs about their self-efficacy (Cleary & Kitsantas, 2017), though that can be challenging in certain circumstances such as a global pandemic (Gradišek & Polak, 2021).

Administrators and other leaders are responsible for creating the conditions for teacher success with professional development and technology integration (Barton & Dexter, 2020; Mullen & Badger, 2023). Their task was to support junior high educators in the transition to online learning by providing additional training and clarification of adapted educational goals and expectations, though this type of professional development was lacking and not integrated well in classrooms, according to research cited from the early 2000s (Cleary & Kitsantas, 2017). More recently, some teachers reported that they were able to get additional support from administrators at both the school and district levels during the pandemic (Mullen & Badger, 2023; Nadeem et al., 2022). Middle school teachers in lower income areas in the eastern United States were specifically provided additional training in how to maintain contact with their students and implement learning materials in an online format (Mullen & Badger, 2023).

However, there needs to be more research from the perspective of junior high educators on whether they possess the self-directed learning skills necessary to gain knowledge, change their worldview on education if needed, or apply new knowledge in a new setting brought on by a global crisis. In addition, it is not known if they believed they had or could develop the skills necessary for success during the rapid changes that occurred in 2020. Understanding the current skill level of junior high educators to meet their adult learning needs more effectively during times of change is needed so that educational systems can continue to support junior high educators to maintain necessary changes in educational formats and expectations. Learning about the personal experiences of junior high educators may ensure that adult learning opportunities can be more specific to meet the challenges that come from adapting to changes in educational systems when local and global factors impact them.

Problem Statement

Callan and Shim (2019) concluded that there is little known about whether educators as learners had the self-directed learning skills necessary to meet the change from face-to-face education to online education on their own. Several researchers have identified common challenges of switching from face-to-face teaching to online teaching (Bishop-Monroe, 2020; Gula, 2022; Kebritchi et al., 2017; Safta-Zecheria et al., 2020; Teng & Wu, 2021) which include, but are not limited to time management, course content, communication, and use of technology effectively in learning. The gap between task requirements and personal capacity is also cited (Kjellström & Stålné, 2017). Segal and Heath (2020), Siefert et al. (2019), and Slack (2019) demonstrated that educators

continue to struggle to integrate technology and educational context due to a lack of perceived competence and the time to develop that competence. Arghode et al. (2017) stated that to bridge this gap the adult learner must be supported during the transformational learning process.

It is not known, for example, whether junior high educators had the self-directed learning skills necessary to gain knowledge, change their worldview on education if needed, or apply new knowledge in a new setting brought on by a global crisis (Giordanos Santos Costa et al., 2022; Llamas-Nistal et al., 2021). In addition, there is little information on whether they believed they had, or actually had, the ability to develop the skills necessary for success during the rapid changes that occurred in 2020, or access to resources, preparing online course content, and having support, though collaboration has proven helpful in some places (Farrell, 2021). Thus, there needs to be more information about the individualized experience of educators that would influence the development of training programs that meet not only career needs but also personal growth needs, which are necessary for adult learners who work as junior high educators.

Purpose of the Study

The purpose of this qualitative study is to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching due to the COVID-19 pandemic. Participants for this study were junior high educators who used their self-directed learning skills to meet the changing teaching requirements from March 2020 to September 2020 with the additional assumption that they are adult learners and can apply the identified skills in a

developmentally appropriate manner. More specifically, this study covered the lived experiences of junior high teachers as they adapted to online teaching between March 2020 and September 2020. A descriptive phenomenological approach (Giorgi & Giorgi, 2003) was used to understand self-directed learning experienced by junior high educators. This study may contribute insight into teacher's self-directed learning knowledge and application, especially during a pandemic.

While there is still much to learn about online teaching during the pandemic, this study looked specifically at how junior high educators applied their self-directed learning skills to overcome the challenges and barriers of changing educational systems between the end of the 2019/2020 academic year and the beginning of the 2020/2021 academic year. A further objective of this study was to provide the insights of junior high educators that may contribute to improving professional development trainings. This information adds to educational and psychological literature, which may alert administrators of educational systems to the need to improve local administrator's abilities to meet their educators' individualized and collective needs.

Research Question

RQ: How do junior high school educators describe the lived experience of self-directed learning in the transition between face-to-face teaching and online teaching during school shutdowns during 2020?

Theoretical Framework

The theoretical framework used as the source for this study is transformational learning theory (Mezirow, 1997). Transformational learning theory is “the essence of

adult education” (Mezirow, 1997, p. 11). Dr. Jack Mezirow stated that it is vital in our modern society to create meaning from our own beliefs, judgments, and feelings in order to act on our own purposes, spending less time relying solely on the same values of others (Mezirow, 1997). According to Mezirow (1997), each adult, due to their life experiences, comes with their own mindset and expectations; transformative learning challenges the learner to look at new information without rejecting it immediately, primarily through discourse or communication in order to explore new ideas or concepts. Critical reflection on a subject due to exposure to new ideas, new people, or new experiences can lead to transformative change (Mezirow, 1997). “This leads to an internal change of consciousness” (Knowles et al., 2015, p. 171).

Merriam (2004) explains that Mezirow’s theory focuses on cognitive growth and development processes that adults engage in. This developmental process is necessary for creativity and adaptivity (Morris, 2020). Transformational learning theory provides a framework to describe the phenomenon of individual and professional growth and development and has often been used to describe changes in personal worldviews during a change process in adult learning (Mezirow, 1997; Mezirow, 2003). When it comes to education, Mezirow (1997) stated, “The educator’s responsibility is to help learners reach their objectives in such a way that they will function as more autonomous, socially responsible thinkers” (p. 8). Additionally, educators are responsible for fostering a transformative learning environment that includes learners supporting each other in problem-solving, self-reflection, and increased diversity, collaboration, and participation (Mezirow, 1997).

Transformational learning theory offered guidance in understanding the lived experiences of junior high school educators as they adapted to educational system changes in 2020 through critical reflection about adult learning and societal changes, collaboration, or discourse, and allowed for more insight into the academic development and pedagogical challenges of educators. Mezirow (1997) stated that it is vital that with the advances in technology, adults will need the skills to adapt to changes quickly, apply critical thinking skills, and be flexible with rapid changes in the workplace. Applying transformational learning theory will allow for a deeper understanding of the phenomenon of self-directed learning by focusing on participants' descriptions of changes they made because of self-directed learning experiences from March 2020 to September 2020. Transformation learning theory will be discussed in more detail, including how it has been applied in educational research, in Chapter 2.

Conceptual Framework

Andragogy, as defined by Knowles et al. (2015), is the process of adult learning and is the conceptual framework for this study. Knowles et al. (2015) consolidated the six main assumptions of andragogy, highlighting the need for more age-appropriate, proactive andragogy, more commonly known as self-directed learning or proactive learning. These six assumptions, related to the concept of self-directed learning, are as follows: adults need to know what they are learning and why; adults are aware they are responsible for their own decisions; adults have more experiences than younger learners; adults are ready to learn and can cope with any barriers to learning; adults focus on the practical application of their learning; and adults are more internally motivated than

externally motivated (Malik, 2016; Knowles et al., 2015). Self-directed learning can also come in the form of collaboration with the following techniques: informal conversations in person, social networking, peer feedback and coaching, team teaching, support groups, case studies, formal educational opportunities, and continuing education courses, which may be supported and facilitated by the institution (Alshaikhi, 2020). Specifically, self-directed learning for adults has two outstanding characteristics: first, learners are able to take control of the resources to teach themselves the material, and second, that learners take control of the goals of learning. Self-monitoring techniques in self-directed learning include self-evaluation, analysis of events, journal writing, reading, and reflection (Alshaikhi, 2020; Bishop, 2021).

Self-reflection can help the individual determine which next steps to take in their academic goals (Callan & Cleary, 2018) and be a powerful way to process a disastrous event (Bishop, 2021). Learners of any age can practice self-reflection, and that information can lead to changes for instructors or administrators. Self-reflection can be a form of self-assessment, and first-year college students reported that this is a very important part of developing learning competencies (Gradišek & Polak, 2021). According to Toker (2020), self-reflection was used to alter future teaching practices by teachers to meet the individual needs of their students based on their reflection responses and promoted additional reflection for the students because of the practice of setting learning goals. Getting individual responses from learners helps support practical differentiation in teaching practices (Toker, 2020). This framework informed the research design by defining the phenomenon of self-directed learning, and since experiences around self-

directed learning skills are the phenomenon of study, then this conceptual framework was used as the foundation for developing more focused research questions to confirm that the phenomenon of self-directed learning is being studied. Further details will be discussed in Chapter 2.

Nature of the Study

The approach chosen to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching in 2020 due to the COVID-19 pandemic is qualitative. A qualitative study, in contrast to a quantitative study, was chosen because the interest is in the "characteristics of a phenomenon or the relationships between events and phenomenon" (Merriam & Tisdell, 2015, p. 5). Merriam and Tisdell (2015) explain that for qualitative studies that there is no meaning without exploring the experiences of phenomenon since it is through experience that humankind creates meaning. A quantitative study would provide objective information, generally free of bias, usually discovered through experimentation. The purpose of quantitative studies is usually to explain and predict (Creswell, 1994; Culbertson, 1981). In contrast, a qualitative study is subjective according to the researcher and the participants; it is value-laden, focused on individual voice, and the purpose of qualitative studies is to understand, interpret, critique, or identify potential (Creswell, 1994; Culbertson, 1981). Additionally, exploring experiences subjectively allows researchers to determine if theories and assumptions remain true in application (Merriam & Tisdell, 2015).

To address the research questions in this qualitative study, the specific research design selected was a descriptive phenomenological approach. Other qualitative styles may have been used, such as a case study, but more experiences around the phenomenon of study than the minimum sample size of one (Patton, 2015) was desired. Additionally, a grounded theory research design was not chosen due to the many existing learning theories and that the core questions of grounded theory are designed to explain what has been observed (Patton, 2015). From phenomenology, interpretive phenomenology was not chosen because the interpretation of events around COVID-19 and its “existential meaning” (Patton, 2015, p. 125) are not the focus of this research. Hermeneutics was also not chosen for a similar reason: the conditions and context of COVID-19 and school shut-downs are well documented, and further exploration of the meaning of the changes due to the pandemic is not the focus of the proposed study. For this study I was most interested in the personal and professional developmental learning experiences of junior high educators at this time. Descriptive phenomenology was chosen because it focuses on understanding the structure and essence of phenomena (Giorgi, 2012; Jackson, Vaughan, & Brown, 2018) as lived and experienced by a person. Interview questions were designed to learn about the self-directed learning experiences of junior high educators.

Phenomenology is based on understanding the lived experiences of participants through the exploration of the “meaning, structure, and essence” (Patton, 2015, p. 115) of the experiences being studied. Giorgi (2014) describes it as “dealing with presences, not existences, which is precisely what a phenomenon is: how an object or situation is experienced, precisely as it is experienced; how an object or state of affairs presents itself

to an observing consciousness” (p. 546). This is a concept expanded on from philosopher Edmund Husserl, who stated that when describing what is the essentiality of what an item or concept: “an individual object...has its own proper mode of being [and] has an essential nature” (2017, p. 53). Additionally, Husserl (2017) explains how essence can be explored. He stated that pure essence manifests through experience, perception, memory, and even fantasy (p. 57). Finally, phenomenology was described by Husserl as “a discipline which furnishes the essential eidetic basis of psychology” (2017, p. 82).

Descriptive or transformative phenomenology research method developed by Amedeo Giorgi is about understanding the individual’s “life-world” (Giorgi, 2014) or lived experiences and generalized by the researcher based on psychological interpretation and with no required interpretation of the meaning of what the participant describes (Giorgi, 2012, 2014). Giorgi (2019) supports Gurwitsch’s definition of the life-world: “the world as we encounter it in everyday experience, the world in which we pursue our goals and our objectives, the world as the scene of all our human activities” (p. 116–117). The life-world is the primary contact between humans and the world, and the purpose of exploring the phenomenon is to establish what is real through description (Giorgi, 2019).

Descriptive phenomenology is a research design that allows for exploring the experiences of a phenomenon and opens the door for additional research and alterations to meet future needs in education and psychology. Additionally, the goal of descriptive phenomenology is to clarify the phenomenon in a psychological viewpoint as it has been experienced and expressed by participants (Giorgi, 2014, 2019). Giorgi (2012) explains that the experience itself is of primary importance to psychological interpretation, but

later clarified that it can be difficult to get back to a pure life-world because it becomes permeated with interpretation and perceptions quickly (Giorgi, 2019). Describing experiences is a part of the meaning-making process in descriptive phenomenological studies, according to Merriam and Tisdell (2015), who asserted that in qualitative studies, there is no meaning without exploring the experiences of the phenomenon. This approach will provide a unique look at the experiences of junior high educators in 2020.

Descriptive phenomenology allows for exploring the experiences of a phenomenon and opens the door for additional research and alterations to truly meet future needs in education.

The participants of this study were adults who worked as junior high educators in 2020 and are defined as adult learners who participated in the role of learner as they prepared for the changes in educational systems in 2020. The schools and districts where these educators worked were defined in the role of a transformational learning facilitator to help educators challenge frameworks to successfully prepare for the online educational format in the 2020/2021 school year.

For the research design, I recruited educators for individual interviews via Zoom. Interview protocols were developed to address the problem and purpose of this study. The data include responses to interview questions regarding the lived experiences of educators using self-directed learning skills in 2020 as they adapted to changes due to the COVID-19 Pandemic. The data were analyzed using psychological reduction in which I identified descriptions from the participants' interviews and interpreted the information

based on psychological value, and the structure and relevance of the data are maintained based on the raw data (Giorgi, 2012), per the descriptive phenomenological method.

Definitions

Asynchronous online learning: Learning facilitated by internet-based interventions such as email, discussions, etc. in which relationships between students and teachers are supported even when they are not online at the same time (Marcum-Dietrich et al., 2022).

Junior High Educators: Educators refer to adults who have received sufficient teaching learning and teaching practice and who then teach students. For this study, educators are further identified as working in a western United States and who worked in grades 7, 8, or 9. They could be identified by this definition in the 2020 calendar year.

Self-directed learning: Self-directed learning is self-teaching through autonomy (Knowles et al., 2015). Learners take the initiative to understand, plan for, and meet their own educational goals with or without institutional resources or support (Alshaikhi, 2020; Bordonaro, 2020; Franco, 2019).

Self-regulated learning: It is the process through which a learner uses self-initiated thoughts and behaviors to achieve a specific outcome that can be taught and learned and is individual to the learner and their goals for their lives (Cleary & Kitsantas, 2017; Hughes et al., 2019).

Self-regulated learners: Students or learners that have sufficient, effective learning strategies and positive self-beliefs that empower them and allow them to adapt their strategies as needed to reach their personalized learning goals; they are most

commonly and demographically known as students in high school or college (Cleary & Kitsantas, 2017).

Transformational Learning: Changing frames of references that are fixed and problematic to increase inclusivity, discernment, openness, reflection, and flexibility to reach a course of action that is truer and more justified based on more accurate beliefs and assumptions.

Assumptions

In qualitative research, the researcher interacts with what is studied (Merriam & Tisdell, 2015). This can lead to informal or evolving decisions as the researcher explores the personal voices of those participating in the study. Qualitative research concerns the lived experiences of research subjects because one “can only know what is experienced” (Merriam & Tisdell, 2015, p. 9). Four assumptions form the foundation of qualitative research: “ontology (the nature of reality), epistemology, (what counts as knowledge and how knowledge claims are justified), axiology (the role of values in research), and methodology (the process of research)” (Creswell, et al., 2018, p. 5).

The ontological assumption is that there are multiple points of view in qualitative research, which the researchers, participants, and readers experience. It is understood in this study that reality is subjective and varied because of the unique experiences of individuals who are part of the study. Especially in phenomenology, there are multiple points of view since participants have first experienced a phenomenon and are then asked by researchers to describe, reflect on, and share their point of view after experiencing the phenomenon being studied (Creswell et al., 2018).

The epistemological assumption is that qualitative research is about the subjective knowledge of participants which comes from different sources, and maintaining an objective distance is not as desirable when compared to other approaches. For example, some researchers visit participants where the research topic exists and sometimes have their own experience with the research topic themselves (Creswell et al., 2018). This can limit objectivity in qualitative research but is important in getting to know participants' lived experiences, which is the focus of descriptive phenomenology (Giorgi, 2019). Additionally, adult learning theory is often seen as transformational and assumes that gaining knowledge through experience and learning changes the learner (Mezirow, 1997). People have their own points of view or values that shape their understanding of the nature of the phenomenon (Giorgi, 2019). In this study, my epistemological stance is that I, as the researcher, had my own learning assumptions challenged or changed through gaining knowledge of the phenomenon the participants experienced.

Axiological assumptions are about values, and qualitative researchers are aware of their own and participants' values and integrate them into the discussion of the research. Thus, qualitative research becomes as much about the topic of study as the researcher's interpretation and experiences (Creswell et al., 2018). In this study, my axiological stance is that an understanding of learning and purpose in education may become more refined for both participants and the researcher as the application of and the purposes in learning have changed due to the COVID-19 pandemic.

Methodological assumptions in qualitative research are formed through the researcher's inductive process. Qualitative researchers sometimes refine their research

questions based on the subjective responses of the participants to get greater clarity about the topic of study from the participants as opposed to keeping the original questions based on theory (Creswell et al., 2018). Trustworthiness in this type of research is maintained as the interview questions remain focused on the phenomenon experienced by the participants, and the reduction of the data remains consistent with the raw data (Giorgi, 2012). These adaptations often come naturally through the interview process commonly used in qualitative research. This inductive process allows the researcher to ask additional questions for clarity and gain a deeper understanding of the participant's experience.

A methodological assumption is that junior high educators are familiar with the phenomenon of study and how it impacted them directly. Giorgi and Giorgi (2003) stated that because the phenomenon is described explicitly from the point of view of the person who experienced it, then the data can be accepted as what they themselves lived; further, researchers can accept the data as an accurate depiction of the phenomenon being studied. Additionally, Giorgi and Giorgi (2003) state that the participants are not aware of the mode of analysis and would, therefore, not know how to change their narrative to fit what the researcher is trying to learn about the study. For this study, it is further assumed that junior high educators are familiar with the principles self-directed learning and how it impacted their ability to make the transition from face-to-face teaching to online teaching so they would know how to describe it accurately. This assumption is also not different from other assumptions in adult learning theories mentioned above, or those of Husserl

(2017) who stated that generalities of a phenomenon can be discovered because similarities are found in multiple subjects.

In this study, it is assumed that adult learners understand what self-directed learning is (Callan & Shim, 2019) and are able to use feedback for further learning and development (Kjellström & Stålné, 2017). Adult learning theories often postulate that adults are self-reflective, and many studies are based on this self-reflective processing using journals or interviews (Malik, 2016). In this study, it is assumed that adult learners are self-reflective and can recall details of their lived experiences. Chen (2023) reported that reflective teaching was a significant part of educator's professional learning during the pandemic, especially in the areas of learning strategies, online communication, classroom management, educator's technological literacy, blending coursework options, addressing sociocultural concerns within the classroom environment, and developing their own and student's adaptive mindsets. Therefore, it may be appropriate for junior high educators to refer to personal notes or reflections they wrote down to help them apply their self-directed learning skills directly. The assumptions mentioned above are important to this study because they are the assumptions of the theoretical and conceptual frameworks that inform the direction of this study.

Scope and Delimitations

This study is designed to explore and understand the lived experiences of junior high educators as they applied self-directed learning skills to their preparations to implement online learning in the 2020/2021 academic year. This focus was chosen because a majority of recent research focused on educational systems has been about the

effectiveness of online learning and the relationship between teachers and students (Bishop-Monroe, 2020; Safta-Zecheria et al., 2020). However, not as much research has been published about the teachers' lived experiences, what supports they had, and how they overcame the challenges of changing from face-to-face to online learning. Specifically, junior high teachers were chosen because there is little research on this population compared to research on educators for other age groups.

This study is not designed to explore the models used by secondary education to meet their needs for online educational formats in 2020. Additionally, this research will not focus exclusively on the transition from face-to-face to online learning or the relationship between junior high educators and their students. Educators for other age groups were not included due to the phenomenological nature of the study, which focuses on the experience of the same phenomenon. Different grades, given the ages of students, would certainly constitute a different phenomenon.

This study is designed to explore the lived experiences of junior high educators in 2020 to better understand how to improve professional development training and how to improve (if needed) self-directed learning skills, which can be transferred to the educator's teaching style and improve the self-directed framework expected for online learners and adult learners.

Limitations

Phenomenological studies are limited in sample size. The sample size for this qualitative study was fewer than 10 participants; therefore, transferability of knowledge may be limited. Another limitation could be by design. As discussed above, there is some

debate about whether educators have a uniform, understandable, and applicable definition of self-directed learning, what skills would be part of self-directed learning practice, and how to apply those skills effectively. Biases in the form of the above-mentioned assumptions have the potential to limit the information acquired during the interview process.

A potential barrier when collecting primary data includes possible difficulty in recruiting participants for interviews. Ensuring a clear separation of my role as a phenomenological researcher and my role as a clinical mental health counselor with my training in solution-focused interview questions was important. A personal bias is that I believe that educators are self-directing but perhaps may be limited by the system they work in to implement their initiative and innovative solutions.

One limitation was that current research on learning theories and adult development is focused on professional development or not often found in the social science domains (Kjellström & Stålné, 2017). Most of the research on adult learners in a professional field is studied through the lens of professional development (Alshaikhi, 2020; Alvi & Gillies, 2020; Currie-Knight, 2020; Jones, 2019; Safta-Zecheria et al., 2020b; Segal & Heath, 2020; Siefert et al., 2019a; Teng & Wu, 2021), and not about adult learners in general, nor about teachers as adult learners specifically.

Limitations identified as biases or assumptions are to be addressed by further research. Personal limitations are to be addressed through support from the dissertation committee, mindfulness practice, the presence of a research journal kept during the data

collection and analysis processes, and additional research into professional development for additional research on adult learning and adult learning theories.

Significance

This study is significant in that it will help fill a gap in understanding junior high or middle school educators lived experiences implementing self-directed learning skills in 2020 and their growth and development personally and professionally. Educational shifts from teacher-centered to student-centered were preparing educators to help students be more self-directed, but there was insufficient time to implement this shift completely before school shutdowns in the spring of 2020 due to the COVID-19 pandemic. With limited time, teachers had to identify which was more important to control (projects or timelines for project completion in a pre-COVID study conducted by Netcoh and Bishop (2017). Audah (2021) stated that it is important to understand educator's choices during 2020 and how they made those choices to address their identified concerns. Additionally, training for educators about the use of technology as a means of teaching instead of a supplement to learning was not always sufficient to meet the sudden demand and changes in 2020 (Gacs et al., 2020; Peimani et al., 2021; Rabaglietti et al., 2021).

The study of junior high educators' experiences of self-directed learning may highlight how educators overcame the challenges specifically related to technology and how they used their own self-directed learning skills to engage their students in an online environment. The results of this study may aid leaders in education and professional development to encourage the development of self-direction in education to improve learning outcomes for educators. Developing support for self-directed learning allows for

a greater capacity for appropriate cognitive development in educators and their students. For the field of education, this research will contribute to knowledge about educator's actual capabilities in self-directed learning, and how administrators and continuing education trainers can support the transitions in educational expectations and applications more effectively. Relevant training will help educators meet their professional goals more efficiently (Mezirow, 1996).

A doctorate degree in psychology with an emphasis on teaching is designed for participants in this program to be able to teach adults and to be a positive influence in educational systems. This research may offer insights to educators in understanding which areas of educator self-directed skills need more focus in future professional development and training, specifically in relation to how to use technology effectively and in accordance with known learning strategies. Such insights may contribute to positive social change by influencing the development of more attention to self-directed learning.

Summary

In 2020, due to the COVID-19 pandemic and social distancing requirements, school closures required junior high educators to adjust quickly and effectively from face-to-face learning to online learning formats. Self-directed learning is part of the adult learner's experience and competency. Being able to adjust quickly and efficiently to changes is a trait of applying self-directed learning skills. Learning adaptation and application (known as self-directed learning) needs to be studied on an individual level to improve adult learning outcomes and professional development for junior high educators.

In this study, it was assumed that adult learners know what self-directed learning is and have the skills to adapt effectively to changes; however, there is ongoing controversy in the literature about the experience and application of this vital adult learning skill.

Several challenges that junior high educators faced in 2020 were changing from a face-to-face format to an online format, quickly needing to develop proficiency in technology use, and adapting course content appropriately for students to engage with and learn the relevant material.

The theoretical framework used for this study is Mezirow's transformational learning theory, which explores how learning changes how a person interacts with the world. Knowles' adult learning theory is the conceptual framework used for this study. The research method chosen for this study is Giorgi's (2012) descriptive phenomenology to explore self-directed learning as it is connected to meaning making and the lived experience of educational professionals working within traditional educational systems. The knowledge gained from this study has the potential to help educators know what they specifically need for continuing education and for providers of continuing education to know what gaps they need to fill to improve educator competency. Such changes could lead to positive social change by improving professional development training for junior high educators, especially in the subjects of technology and teaching. Another potential social change is the empowerment of educators as their needs in professional development are heard and met by the administration. This research is limited in scope and transferability as it focused most on a small number of individual's lived experiences.

Additional research will be necessary to understand this phenomenon in other areas and with other populations.

Chapter 2: Literature Review

Introduction

In 2020, educational systems experienced a sudden change in format due to the worldwide Coronavirus Pandemic. Many schools that worked in face-to-face format had to change to online formats. This created challenges for teachers and students as they learned how to effectively use technology for primarily educational purposes instead of as a learning supplement and had to adapt course content for online learning. In this chapter, the literature search strategy used to find relevant research articles will be described. An overview of the theoretical framework of transformational learning theory and the conceptual framework of self-directed learning will be provided. Finally, a review of the literature about self-directed learning and identified skills, the transition to online learning for junior high educators, as well as research specific to the training and development of junior high educators will be provided to highlight the need for additional research on this topic.

Literature Search Strategy

I accessed articles through the Walden Library search engine Thoreau, also known as EBSCOhost, which allowed me to access articles from several databases, and other Internet search engines. I searched for keywords and abstracts of relevant articles from 2015 to 2023 using the following terms: *andragogy, adult learning, self-directed learning, face-to-face teaching or face-to-face learning, online teaching or online learning, barriers or challenges or difficulties or issues, Transformational Learning Theory, Phenomenology, barriers to adult learning, junior high or middle school,*

educators or teachers, and COVID-19 or Coronavirus. I conducted separate searches in databases for psychology and adult learning, especially Education Source, ERIC, APA PsychInfo, and SAGE Journals. Using the Boolean operators, I was able to restrict the search to include only peer-reviewed articles within the years listed above. I further narrowed my search through combinations of terms such as *COVID-19 AND junior high OR middle school AND educators OR teachers, andragogy OR self-directed learning AND junior high OR middle school AND teachers OR educators, or self-directed learning AND junior high teachers AND COVID-19 OR Coronavirus.* Articles were either found through Google Scholar or the Walden University Online Library. A search in July 2023 for *self-directed learning AND junior high teachers or middle school teachers AND COVID-19 or Coronavirus AND United States of America or USA or U.S.* resulted in zero results when the Boolean operators for peer-review articles between 2015 to 2023 were present. When broadening the search parameters in July 2023 to increase access to relevant articles in the United States, the search for *junior high teachers or middle school teachers AND COVID-19 or coronavirus AND United States of America or USA or U.S. AND online education or online learning* resulted in only 14 total potential sources when the Boolean operators for peer-review articles between 2020 to 2023 were present.

Theoretical Foundation

Transformational learning theory (TLT) is a humanistic learning theory, according to Arghode et al. (2017). Jack Mezirow, who developed TLT, wrote, “Transformation theory holds that the base line should be the lived experience of the

learner in reference to his or her...goals” (1996, p. 115). Mezirow (1996) also asserted that “Transformative learning develops autonomous thinking” (p. 5). In addition, the internal frames of reference for learning, he claimed, are the aspects and ways of learning that need to be altered for new information and the application of new learning.

Self-directed learning is a hallmark of adult learning theory and is a critical part of the process of transformational learning theory and application (Mezirow, 1997). One of the goals of TLT was to help learners challenge social assumptions to develop new ways of learning and new ways of doing (Mezirow, 1998). A challenge to social assumptions can come internally as adults learn new material or from an outside source in which a learner needs to adapt to a new situation. “Transformative learning for teachers, like students, occurs when it is directly applicable and hands-on” (Slack, 2019, p. 18). Another goal of transformational learning theory is to help learners challenge social assumptions to have new ways of learning and new ways of doing (Mezirow, 1998).

Merriam (2004) presented a clear overview of Mezirow’s transformational learning theory and stated that two major facets of the theory are reflection and discourse. Specifically, while many adults may not achieve the highest level of development in their lifetimes, transformation is an important part of adult development (Merriam, 2004). Mezirow (1997) reported that important aspects of his transformational learning theory are the development of autonomy in the face of cognitive change which often leads to a change in world view, and the instructor becomes a co-learner and facilitator more than an expert, which is its own change in world view. Merriam (2004) emphasizes that statement proposing that the learner’s personal lens is how one makes sense of the world

and new perspectives or lenses may be developed through the learner's ability to be open, capable of emotional change, and reflective with the end goal of increased independent thinking and autonomy. This level of learning, warns Merriam (2004), may require a level of cognitive proficiency before it can be fully developed. To aid in this process of development, Dirkx and Mezirow (2006) describe the importance of making unconscious learning more conscious so that change is possible. Mezirow's perception of transformational learning theory includes the unconscious process of learning combined with critical application of knowledge, sometimes through discourse (Dirkx & Mezirow, 2006).

Alshaikhi (2020) discussed how educators from Saudi Arabia used self-directed learning skills of networking, collaboration, and reflection to effectively meet the changes and challenges in educational systems in 2020, and Currie-Knight (2020) discussed how independent searches for knowledge helped educators adapt to change in their careers due to the many changes in educational structures in 2020. University professors who taught adult learners who were studying to become junior high educators used reflection frequently in 2020 to demonstrate how to transition from face-to-face to online learning (Rahman et al., 2022). Christie et al. (2019) reported a positive correlation between transformative learning and transformative leadership skills development, specifically that people who have gone through transformative learning practices can better teach it and model it for others. Additionally, Hockett (2018) highlighted that transformational learning is based on experiential learning.

The concept of self-directed learning as it pertains to the development of autonomy (the goal for the adult thinker, Mezirow, 1997) in the adult learning process supports the framing of the research design by focusing on understanding how learners challenge frameworks in mental and physical systems that need adaptation. It has influenced the structure of the interviews and will inform the analysis of data collected through interviews with junior high school educators. Transformational learning theory will provide clarity to the lived experiences of educators in this study, specifically by paying attention to chronology and worldview change or development.

Conceptual Framework

Self-directed Learning, known by this name in research from the 1980s, as conceptualized by Knowles et al. (2015), was based on the idea that adult learners often do not know how to be self-directing since most students in the United States have been taught to be dependent on a teacher for knowledge. The two traits that differentiate self-directed learning from other adult learning are self-teaching and personal autonomy, though it is not assumed that every adult learner has both traits in all learning situations (Knowles et al., 2015).

Additionally, self-regulated learning, another name for self-directed learning, focuses on the overt actions of the learner, the interactions between the learner and their environment, and their beliefs and how they influence their will (Cleary & Kitsantas, 2017). Some of the skills of self-regulated learning include strategies to regulate and organize materials and emotions, seeking help and feedback, exploring deeper learning,

and managing their learning environment; organizations, flexibility, and persistence are also listed as traits of a self-regulated learner (Cleary & Kitsantas, 2017).

Self-directed Learning

Self-directed learning is based on the concept of andragogy, or adult learning theory. Andragogy, also known as autonomous motivation, differs from pedagogy because learners are more independent from a teacher; they also take more responsibility for what they learn because they have a reason and readiness (Fujita et al., 2021), to learn what they need to improve their lives (Knowles et al., 2015). Ambrose et al. (2010) and Woldkowski and Ginsberg (2017) report that metacognition is a vital part of adult learning because the adult learner (not a teacher) is responsible for assessing their learning task, evaluating their level of knowledge and skill, planning their approach to the learning, monitoring their own progress, and adjusting their learning strategy as needed.

In the research, most adult learners are defined as adults taking higher education courses (Gradišek & Polak, 2021), but for the purposes of this study, adult learners will be defined as adults who continue to engage in a learning process, whether formally or informally (Bordonaro, 2020). Knowles et al. (2015) provided six key assumptions of andragogy, which are important to understand the vitality of self-directed learning. The first assumption is that adult learners need to know why they need to learn something because it will need to be useful to them to gain something or to avoid a negative consequence (Knowles et al., 2015). Part of this need can be determined by the gap between an adult learner's current ability and their goal for their future competence in a subject (Jhang, 2020).

The second assumption is that adult learners are autonomous and have a desire to be self-directing and be seen by others as self-directing (Knowles et al., 2015). They also view this autonomy as a form of adult responsibility (Mezirow, 1997). Ironically, adult learners who perceive themselves to be or are less competent than their peers have been shown in research to not fully participate in adult learning courses, and the need for peer support and collaboration becomes an important element in supporting autonomy and self-directing behavior (Jhang, 2020).

The third assumption is that adult learners have more lived experiences than youth, and, therefore, one of the greatest sources of learning is the learner themselves or their peers (Knowles et al., 2015).

The fourth assumption is that adult learners are ready to learn the material that will be immediately, or soon-to-be, applicable in helping them know how to manage a problem, concern, or change in life situation (Knowles et al., 2015). This assumption could be a reason why some adult learners only partially participate in a professional development courses (Jhang, 2020).

The fifth assumption is that adult learners are life-, problem-, or task-oriented when it comes to learning, and the learning becomes easier if the problem is realistic (Knowles et al., 2015). Groups dedicated to professional development and helping an adult to help others are most effective with a focus on results (Slack, 2019).

The sixth assumption is that adult learners may be externally motivated and look for ways increase their income, but most are internally motivated and are looking for greater job satisfaction or areas to learn and grow (Knowles et al., 2015). Because adult

learners can be motivated by both sources, it can be helpful for administrators to offer extrinsic rewards for full participation in a professional development course (Jhang, 2020). These assumptions shape the research design as the participants are adults with their own teaching experiences, are ready and able to apply new knowledge to a problem related to their work, and are internally motivated to succeed.

Components of self-directed learning include scaffolding and the process of learning, student autonomy, evaluation (Alvi & Gillies, 2020; Slack, 2019); collaboration with staff, and focus on experiences, having a professional and supportive learning environment (Bishop-Monroe, 2020); and potentially seeking learning independently of an institution (Currie-Knight, 2020; Franco, 2019). Sperling et al. (2016) recommended four strategies to promote self-directed learning practices for adults actively participating in higher education: first, self-explanation which helps students develop mental flexibility by prompting students to learn information and extrapolate their own possible behaviors from a variety of viewpoints; they state that this strategy can be prompted by a teacher or a prompt on a computer screen and promotes the transfer of skills which reduces instructional demands on educators. A second learning strategy that Sperling et al. (2016) discussed was asking “why” questions which allows a learner to understand a concept; exploring a learner’s understanding of why is an opportunity to provide effective feedback for the learner. A third strategy presented by Sperling et al. (2016) is having a learner create a drawing because it helps with observation and content comprehension through which the learner can receive feedback. Finally, the fourth strategy from Sperling et al. (2016) to promote self-directed learning was learner-generated examples which

improves comprehension; this strategy also allows the teacher to provide appropriate feedback as they will be able to determine if the learner-generated example is accurate and helpful to the learner. Strategies that include actual practice have a greater success rate for the learner to retain and apply their knowledge than other strategies (Barton & Dexter, 2020). It is important to note here that feedback provided online is perceived and interpreted differently than in-person feedback, and that feedback and interactions between students and teachers were not of the same quality during 2020 (Gradišek & Polak, 2021). In a U.S. university, professors provided effective and detailed feedback to their students to help them improve their flexibility to transition from face-to-face to online learning (Rahman et al., 2022). They learned that without prompt feedback, that their students reverted to old ways of thinking and presenting the course material they were practicing, and as they were able to be most effective as they reflected on their own transition to online learning in 2020 (Rahman et al., 2022).

Self-directed learning can be a joint venture between administration and educator. In 2020, a medical school's administration took the time to provide the scaffolding for technology integration and trained their educators on the online platform they wished to use which led to a smoother transition to online learning (Prabhath et al., 2022). In fact, studies have previously shown that supportive administration has a positive impact on teacher readiness (Fujita et al., 2021) and are a necessary support for managing interactions between colleagues and students in order to maintain learning community connections (Jocius et al., 2022). However, not every school was able to provide that support, and sometimes adult learners were overwhelmed with the amount of

organizational instruction needed to transition to online learning (Gradišek & Polak, 2021). Knowledge of self, transformational learning theories, assessment, and engagement are also components of self-directed learning (Jones, Penaluna, & Penaluna, 2019). Writing field notes to review can help with the personal assessment aspect of transformational learning (Giles, 2018).

Additionally, Morris (2020) reported that creativity is necessary in self-directed learning and are often found in the classroom as group discussions, facilitating access to resources, and co-creating meaning. Artful expression is a contributing factor to helping adult learners explore culture and identify and visualize learning material in a way that is personally understandable (Alshaikhi, 2020; Sawyer et al., 2022; Sperling et al., 2016). Blackburn Miller (2020) reports that as adults learn, art can be an effective way to creatively explore solutions and challenge norms and expectations. Saritepeci and Orak (2019) identified a strong positive correlation between self-directed learning and life-long learning. Self-directed learning is personalized education (Olofson et al., 2018).

Knowles et al. (2015) stated that adult learners often do not know how to be self-directing since most students have been taught to be dependent on a teacher for knowledge (p. 52–53) Practical components of self-directed learning include scaffolding and the process of learning, student autonomy, evaluation (Alvi & Gillies, 2020); collaboration with staff, and focus on experiences, having a professional and supportive learning environment (Bishop-Monroe, 2020); and seeking learning independently of an institution (Currie-Knight, 2020; Franco, 2019). Barriers to self-directed learning and andragogy such as inaccessibility to opportunities, resources, programs; negative self-

concepts, or time constraints are considered a violation to the principles of adult learning (Knowles et al., 2015, p. 47).

Knowles's adult learning theory (Knowles et al., 2015) described the steps in an andragogical, or self-directed learning, process. The steps identified are: having access to information and expectations, having a supportive and collaborative environment, mutual planning with learners and teachers, feedback through mutual assessment and negotiation, developing lesson plans based on readiness and active problem solving, and peer discussion about learning success (Knowles et al., 2015). The major hypothesis of andragogy is that adult learners already know and follow the above-mentioned learning steps.

Knowles's adult learning theory, like transformational learning theory, provides the basic definitions of what self-directed learning looks like. This definition is our current understanding of the phenomenon known as self-directed learning. It guided the interview questions for junior high educators as adult learners who should be able to access and apply the practical applications of adult learning that match adult learning theoretical assumptions.

Literature Review Related to Key Concepts

The purpose of this qualitative study is to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching due to the COVID-19 pandemic. The literature often speaks of professional development in terms for adult learning for working professionals, specifically educators. As such, this section expands on the research related to junior high

teachers during the pandemic, worldwide teaching, and learning adaptation to online learning. Research has shown that self-regulated learners are more successful during independent learning activities, and increase feelings of personal empowerment (Sperling et al., 2016). The following topics are discussed here: Transition to Online Teaching in 2020, Pre-COVID Junior High Education, Adult learners transition in 2020, Online teaching compared with face-to-face learning, Online teaching barriers, Online teaching benefits, Online Learning Preparation and Outcomes in 2020, Junior High Educators during COVID-19, Junior High Teachers and Self-directed Learning, and Professional Competence. The literature review is followed by a brief summary.

Transition to Online Teaching in 2020

Online learning became the primary available format to continue education in 2020 to help prevent the spread of the coronavirus, and students and teachers had to use (or learn how to use) their Information and Communication Technology (ICT) competencies effectively. Many schools faced “online delivery under unprecedented pressures with limited substantial resources and increased demand for online teaching and learning” (Peimani et al., 2021, p. 6). Some researchers have called this “Emergency Remote Education” (He & Xiao, 2020) or Emergency Remote Teaching (Mullen & Badger, 2023). Mullen and Badger (2023) state that Emergency Remote Teaching is not quite the same as planned-for online learning or technology used in a blended classroom format. He and Xiao (2020) noted that the timing of when shutdowns occurred in school could have contributed to how schools handled the transition to online learning. In China,

the shutdowns occurred before the beginning of Spring semester so that students and teachers could not return to in-person classes for the new semester (He & Xiao, 2020).

Safta-Zecheria et al. (2020) conducted interviews in Romania to identify some of the challenges, resources, and supports educators were able to access during this emergency change from face-to-face education to online education. According to Safta-Zecheria et al. (2020) some barriers that educators experienced were a lack of access to technology for themselves, and a lack of education-specific materials for online learning. Adult learners participating in higher education institutions reported being less organized, more confused, and perceived they learned less; they also suffered from a lack of motivation and often felt that accessing the required course materials was difficult (Gradišek & Polak, 2021). Two of the biggest barriers experienced by educators were lack of interaction with their students, and the sudden change in the educational setting (Sepulveda-Escobar & Morrison, 2020). Another barrier to educator success in the transition from face-to-face to online learning is the lack of support and training from their institutions (Mouchantaf, 2020).

There is some inconsistency in knowing how teachers were able to view the transition to online learning and how to use online learning methods effectively. This could be attributed to the fact that teachers have different goals in their professional development depending on whether it is conducted in person or online (Jocius et al., 2022). Additionally, even though remote learning has been around since the 1960's, there continues to be uncertainty about the effectiveness of that learning format, especially concerning the social aspects of learning (Mullen & Badger, 2023). In Hawaii, some

junior high teachers were grateful to have more tools and new ways to interact with their students due to having to learn how to use technology during 2020 (Miyashiro, 2023). However, Miyashiro (2023) reported that the junior high teachers also stated that while they appreciated the technology training that they received to implement online learning in the 2020/2021 school year, they would have preferred an in-depth training at the state level. It is vital for instructors to be trained in online platforms and have sufficient support throughout the process (Igbokwe et al., 2020; Yen et al., 2018).

Miyashiro (2023) stated that technology training in Hawaii at the school level was very helpful because teachers were able to get some of their questions answered about how to use the technology and how to present curriculum online. Mouchantaf (2020), when discussing the state of higher education in Lebanon, expressed that despite support from government and technological resources, that many educational institutions struggled to maintain stable internet connection which disrupted online courses in 2020. This barrier has been highlighted by other researchers as well (Nuere & de Miguel, 2020; Yumuşak, 2020). Safta-Zecheria et al. (2020) and Igbokwe et al. (2020) further reported that many teachers, due to a lack of guidance or training in 2020, were not prepared or were provided minimal instruction to know how to meet their students' learning needs in an online format. Miyashiro (2023) reported that not all schools were able to get sufficient support from their administration, but their participants reported ongoing support and funding from administration, and access to instructional coaches for personalized support.

Five higher education instructors in Saudi Arabia participated in an interpretive phenomenological study conducted by Al-Freih (2021) who reported their level of comfortability with knowing and practicing teaching with technology was a contributing factor to their stress and their success in engaging students with learning content. While some higher education institutions, including University of La Rioja and The Polytechnic University of Madrid, provided general information about online options for school, there was limited use of online options due to high volumes of consumers and some technical barriers due to needing specific programs to be able to access the approved online teaching tools (Nuere & de Miguel, 2020). Some educators expressed that having guidance was helpful in identifying which technology platforms would be most accessible (Safta-Zecheria et al., 2020; Yen et al., 2018). Additionally, many educators took longer to prepare course materials for online classrooms because they also had to develop competency with digital formats for their course materials (Mouchantaf, 2020). Some educators found support online and viewed learning how to use the technology as part of their development as educators (Safta-Zecheria et al., 2020). Beyond the need for improved knowledge about technology, a personal impact was felt by teachers and students alike with the sudden change in education.

Teachers are reported to have experience a “collective trauma” that impacted their ability to transition effectively to an online format (Mullen & Badger, 2023, p. 2). Junior high educators had to deal with all the above listed issues as they suddenly had to teach online, from their own homes, manage their own mental stresses, and keep students engaged in learning to the best of their ability in an environment which decreased their

control and engagement with students. Junior high teachers reported that online instruction during COVID-19 led to decreased class attendance and inattentive students not passing their classes at the state-level requirements (Mullen & Badger, 2023).

Pre-COVID Junior High Education

Junior high education in the United States was primarily face-to-face before school shutdowns in 2020. For example, junior high teachers in Hawaii reported that they did not use technology much in their classrooms and their training pre-COVID was designed to support learning success in a classroom while the teacher was physically present to provide immediate feedback to their students (Miyashiro, 2023). Miyashiro (2023) stated that research before 2020 indicated that one of the benefits of face-to-face education was better learning outcomes compared to online learning. One of the weaknesses of face-to-face learning is a lack of engagement per student which decreases student motivation (Miyashiro, 2023). However, even before school shutdowns, teaching was not without its challenges.

Junior high educators are challenged to meet the individualized needs of their students and the common core standards presented by the State Department of Education. Research from before 2020 indicated that junior high educators needed to be able to help junior high students remain motivated to their learning, learn meaningful curriculum, and encourage the development of their students own self-regulated learning and transference of acquired knowledge (Netcoh & Bishop, 2017; Sperling et al., 2016). For example, junior high and high school science teachers have a curriculum to follow, but teaching their students how to write in that specific discipline is important for students to

understand the fields of science (Drew et al., 2017). However, Drew et al. (2017) reports that junior high and high school teachers were more likely to assign writing tasks that required minimal writing and did not promote personal learning development for their students well. In fact, evidence-based practices for teaching writing was not being implemented consistently in secondary-level classrooms, and even adaptations for struggling students were not implemented regularly (Drew et al., 2017). Drew et al. (2017) further reported that junior high science instructors were better at implementing writing practice than high school teachers as they focused on more basic writing elements than the more advanced specialized writing which is expected at the high school level. Additional self-directed learning-based training was recommended for secondary teachers to increase their confidence in teaching writing, improve the value of writing in the sciences, and help them implement evidence-based writing instruction and necessary adaptations more regularly in their classrooms (Drew et al., 2017). This particular research indicates that junior high teachers did not have sufficient self-directed learning skills prior to COVID-19 either through ignorance or a lack of application of available interventions despite being more successful than high school teachers at basic implementation. Some middle school teachers in the mid-western United States had trained on a specific program in 2019 for face-to-face teaching (Marcum-Dietrich et al., 2022). Marcum-Dietrich et al., (2022) reported that junior high teachers had to learn how to transition the program to online learning during the school shutdowns.

Since the mid-2010's there has been a movement to increase student-centered and even student-driven learning in some areas of the United States, which caused unique

challenges for educators pre-COVID. Personalized or self-directed learning for junior high students is developmentally appropriate, but the application of self-directed learning skills was not in line with a more traditional teacher-centered approach (Netcoh & Bishop, 2017). The successes of transitioning toward more personalized or self-directed learning for teachers were a stronger relationship between teacher and student as they addressed the individual concerns about the personalized project, greater support from peers who were also working on projects, and decreased stress on teachers since they did not have to focus as much on content and curriculum (Gula, 2022; Netcoh & Bishop, 2017). These successes would be helpful in an online learning environment where the teacher is distant and by the nature of online learning, has less control of the learning environment.

The challenges of this move toward more personal or self-directed learning for teachers were managing learning objectives, time management throughout the project, and managing deadlines (Netcoh & Bishop, 2017). In 2013, there was an educational focus change from generalized teaching for more personalized teaching and schools were encouraged to facilitate more personalized approaches to education to meet the diverse needs of students (DeMink-Carthew et al., 2017). Structure and practice contribute strongly to the success of learning and the application of new knowledge (Lysniak et al., 2019).

Further, teachers themselves are not allowed to be as self-directing as they may prefer because are provided with teaching material to meet federal guidelines. Teachers are often provided with the curriculum learning objectives, know how to manage the time

for an assignment in a classroom, and meet school and district deadlines. At the same time, they can struggle to give that control to students, especially when projects were diverse and on different timelines, and students had not known how to set appropriate deadlines for themselves, according to Netcoh and Bishop (2017). Since some barriers to self-directed learning include student's ignorance or students trying to learn in isolation, teachers need to be able to counteract these two barriers by helping students learn effective learning strategies well (including what, why, how, and when of application) and have interactions between student and teacher with appropriate feedback about the strategy and execution (Sperling et al., 2016). Teacher's perceptions and attitude toward the usefulness of technology really impacted teachers' ability to implement it, and influenced their flexibility in applying it and the flexibility of their student's use of technology and engagement in classes and synchronistic meetings held during COVID-19 school shut downs (Tseng et al., 2022).

Feedback is important in the process of knowledge inquiry and integration because it can motivate learners to have more engagement with learning content and strengthen their understanding (Gerard et al., 2016). Feedback can be generic or specific, but teachers may not know how to provide effective feedback for diverse ideas for their students or they may lack the time to provide the individualized feedback that students require for improved learning outcomes (Gerard et al., 2016). Gerard et al. (2016) identified that electronic feedback was found to help student learning through its immediacy and the content which led students to reflect on their work to improve or

change their answers; this electronic feedback was found helpful to teachers as it allowed them more time for further feedback with students or time to connect with more students.

Studies about junior high students are more common than studies about junior high teachers. Self-directed learning, often called self-regulated learning, is often studied in junior high students due to the interest in educational outcomes (Cleary & Kitsantas, 2017). For example, Cleary and Kitsantas (2017) conducted research on self-directed learning with middle school students in the subject of math. One way to test for the accuracy of students' self-regulated learning would be to use the Self-Regulation Strategy Inventory–Teacher Rating Scale (SRSI-TRS) in which teachers evaluated the self-regulated learning strategies of their students (Cleary & Kitsantas, 2017), but this rating scale was not designed to determine the self-regulation strategies of adult learners. Since there is no known assessment designed to determine the self-regulation strategies of adult learners, it may be more challenging for adult learners to objectively assess and then appropriately develop their autonomy.

Adult Learners Transition in 2020

In order to be successful in continuing their education, all adult learners working in education had to adapt to the new changes to their educational formats due to quarantine requirements in 2020, crisis-driven online learning and teaching (Gacs et al., 2020). Much can be learned from the transition that professors at Michigan State University experienced in order to manage the changes and barriers that they faced to continue with their educational goals, including looking at technology and the effectiveness of their organizational structure. Additionally, we note that this was an

ongoing world-wide event as educators in higher education in Spain had to learn educational technologies from scratch or use their own knowledge and devices due to a lack of training or support, and the suddenness of the changes required during the closures of face-to-face institutions (Nuere & de Miguel, 2020).

A change in perspective or behavior is often a result of learning and applying new information. Gradišek and Polak (2021) explored some of the principles of change. They discovered that teachers had to plan course materials and exams to meet an online format, adapt to changing from a teacher-centered way of teaching (common in face-to-face teaching) to a student-centered way to teaching (more common in online learning), and had to learn how to teach and engage students with less scaffolding in place as they were forced to have fewer personal interactions with their students (Gradišek & Polak, 2021). Educators in some higher education institutions, such as Notre Dame University and Michigan State University, found that changing from face-to-face to online teaching was a task they could accomplish, and they were able to rely on each other for help and support as they shared their own experiences (Gacs et al., 2020; Mouchantaf, 2020). Self-directed learning allows a learner to look at their successes and failures as connected to a task or belief they can control such as planning course materials or communicating with peers and administrative personnel for support; being able to take action and have increased autonomy has led to greater learning success (Barton & Dexter, 2020; Pair et al., 2019).

Additionally, due to the suddenness of the changes to online learning, adult learners (no matter their official status of student) suffered from the following disruptions

which led to a lot of confusion for adult learners: disconnections in relatedness by being distanced from peers, changes in autonomy due to having more time but less guidance or instruction, and doubts about their competence and self-efficacy due to needing to master ICT (Information and Communication Technology), learning objectives, giving and receiving feedback, and a new way to reconnect with peers in a short period of time (Gradišek & Polak, 2021; Ramdhani & Kholidi, 2021). Adult students in medical school reported that feedback in the form of quizzes and more personalized feedback for their learning were beneficial in helping them grow and develop as adult learners (Prabhath et al., 2022). Having simple solutions made a positive difference for adult learners in higher education.

However, a direct transition from face-to-face to online learning is not always effective or successful. Gradišek and Polak (2021) explored how student adult learners in their first year of higher education who studied psychology in the 2019/2020 school year reported that those adult learners cited online lectures as a primary means of learning during the pandemic which helped students remain in contact with their peers and teachers in a synchronistic environment; online tutorials were available to help students with their semester projects which was helpful to those students who used them. Gradišek and Polak (2021) reported that less than 45% of students engaged with reading the required assigned literature and felt that it was relevant to their professional development; online discussions were lacking in flow which was attributed to the formats of the online platforms. This shows that many adult learners, even those who are adult learners

attending a higher education institution, did not take the initiative to be self-directing in their own learning.

Online Teaching Compared with Face-to-Face Teaching

Non-traditional learning has been around in higher education for a long time, and online has become more wide-spread with the improvements in technology due to changes in funding and college attendance (Morreale et al., 2021). Online learning for adult learners is a platform for learning which could be used as a model for other educational levels who needed to move to online learning in 2020. Due to the coronavirus pandemic, educational institutions had to make the sudden shift from face-to-face teaching to online learning quickly (Morreale et al., 2021). Still, there are ongoing common concerns with online learning and the adult learner. The primary areas of competency that an online educator needs to develop were highlighted by Nuere and de Miguel (2020), and expanded by further research. These areas of competency include: “developing core professional qualities, including communication, interpersonal and practical skills among students, and sustaining student retention rates, along with training and support to effectively use online technologies and address technical issues and cyber security risks” (Peimani et al., 2021, p. 2). Even before COVID-19, Kebritchi et al. (2017) reported that adult learners may have expectations of receiving feedback quickly and recommend that instructors express their expectations at the beginning of a class. Self-regulated learning, supported by prompts or additional individualized support, allows the learners to have greater recall on how to complete tasks necessary for their goals (Hughes et al., 2019). Additionally, online feedback provides a written record of

specific information for the student to review which can be helpful, but educators should be aware of possible misunderstandings due to a lack of non-verbal cues and additional complications of ease of in-person conversations (Nistor & Comanetchi, 2019). Due to the suddenness of school shut downs, it is unlikely that administrators had adequate plans or expectations in place for a sudden shift in educational formats, including appropriate methods for communication between educators and students. An instructor's presence is necessary, and has been an ongoing concern in the transition from face-to-face to online teaching (Morreale et al., 2021).

Along with presence, an instructor must be ready and motivated to engage in learning and teaching. Kebritchi et al. (2017) further reported that adult learners may struggle with readiness in the forms of self-directed learning and self-motivation. Motivation is a key component in a learner's engagement and sense of community (Bonds et al., 2021). Learners often struggle in some topics due to the perceived lack of learning community in an online learning format (David & Grosu-Radulescu, 2016). Kebritchi et al. (2017) stated that a learner's identity and connection to community and participation were important, and it is unknown whether junior high teachers as learners themselves were able to maintain a sense of community and identity due to quarantines and social distancing. However, social media platforms were cited as online environments that were effective for connecting with learning communities (David & Grosu-Radulescu, 2016).

Online learning works best with learners who are already highly motivated (David & Grosu-Radulescu, 2016). While high motivation comes from intrinsic motivation,

many learners are used to extrinsic motivation which impacts their ability to engage effectively in online learning (David & Grosu-Radulescu, 2016). It is unknown whether junior high teachers were ready or not to appropriately employ self-directed learning skills or if they were self-motivating. Marcum-Dietrich et al. (2022) reported that the junior high teachers they interviewed were able to use their own knowledge and skills to adapt a face-to-face program to an asynchronous online program by first keeping the online portions of the program intact. However, part of the curriculum was unable to be used due to the change in teaching formats (Marcum-Dietrich et al., 2022). Some K to 12 settings preferred synchronous online classes to maximize the benefits of face-to-face teaching in an online environment such as a teacher present who is able to give immediate feedback (Miyashiro, 2023).

Another common concern with online learning is course room content (Kebritchi et al., 2017). It is unknown whether junior high instructors had access to content to help them prepare for the change to online learning, or if they had sufficient access to content for their students and what instructional plans, strategies they hoped to implement to keep themselves prepared and their students as engaged as possible (Kebritchi et al., 2017). Some subjects, specifically those in the fields of science, psychology, language acquisition, medicine, physics, etc., require a way to have in-person practice which was made difficult as access to labs was denied or limited in 2020 due to the pandemic (Gamage et al., 2020). A purely asynchronistic model often hinders the connection to a learning community and feedback from peers and instructors, and quality may be diminished as some subjects do need students to have personal experiences with the

learning materials, and learning interactions with teachers or other experts (Gamage et al., 2020). The biggest challenge with asynchronous learning models is that learners are on their own. The lack of feedback and the danger of loneliness to the learner leads to decreased retention in education (Miyashiro, 2023). While convenient, asynchronistic formats are not the best for all disciplines or age groups.

Online learning formats have the potential to increase connection between classroom participants through discussion posts, and often allow for more individuality and control in the learning process for the adult learner (“Adult Online Education,” 2018), and connection between participants is necessary for learner motivation, autonomy, and relatability (David & Grosu-Radulescu, 2016). Online learning formats also have the potential to be very flexible, but there are some ongoing challenges with helping students become familiar with some tools and processes in some courses where online learning cannot fully meet criteria for an in-person learning environment (Gamage et al., 2020). Gamage et al. (2020) reported that universities that had both asynchronistic and synchronistic course materials helped support students’ learning and location needs, and online videos were helpful to demonstrate complex processes in some lab courses.

No matter which learning theory used, one of the roles of the educator has been to make sure educational information is available to their students in an understandable way. Teachers need to be aware that anxiety, a sense of confidence, motivation, and belief in the effectiveness of the teaching format can significantly impact an educator’s motivation, performance, efficacy, and readiness (Ak & Gökdaş, 2021; Fujita et al., 2021; Mullen & Badger, 2023). In a study of university instructors, it was found that many

instructors lacked the ability to use technology in a sufficiently interactive way to keep their students engaged (Stewart & Wolodko, 2016). Chen and Meng (2021) reported that student success is dependent on engagement and the ability to monitor their own learning behaviors. In the study by Ak and Gökdaş (2021), the importance of training in online learning to support the success of educators who must work in the online format was emphasized.

Online resources have the potential to support educator's learning and access to resources and support. The internet has a variety of resources for teachers to use to improve or supplement their teaching, and their own learning (Alshaikhi, 2020). Resources are available to learn how to have a quality online learning environment such as Quality Matters or Online Learning Consortium (Kebritchi et al., 2017). It is unknown if these resources were offered or available to junior high educators before or during 2020 and if there were any concerns with a lack of active participation and engagement. Bishop-Monroe (2020) reported that some middle school teachers worked with technical services, collaborated with fellow staff, and focused on experience to create a professional and supportive learning environment. Currie-Knight (2020) reported that educators in transition benefit from independently seeking learning and this helps in their ability to adapt to changes, and influences their approach to teaching. Jones, Penaluna, and Penaluna (2019) found in their research that knowledge of self, learning theories, assessment, and engagement are important factors in the development of self-directed learning and transformation in learning. This research indicates that some middle school

and other educators were able to use technology and self-directed learning skills effectively.

Online Teaching Barriers

Online teaching barriers include but are not limited to a change in roles for teachers and students, transition to online formats, time management, teaching style adaption, and content development. Recent research indicates professional development training continues to be needed for instructor development (Chih-Hung Tseng et al., 2022; Kebritchi et al., 2017). Chih-Hung Tseng et al. (2022) also pointed out that the top three barriers to successful online learning, especially in 2020 were interference in the class, poor internet quality and connectivity, and educators being unable to effectively teach online. Additionally, students had the stress of finding ways to study from home, manage any mental illness symptoms that may have arisen, and also learn new ways to access course materials online (Gradišek & Polak, 2021).

Teachers are often seen as models, and teachers who have not integrated technology in a more student-centered environment, can influence a lack of learning progress in their students (Barton & Dexter, 2020; Tseng et al., 2022). Instructors new to online teaching may especially struggle to provide a quality educational environment without proper supports (Tseng et al., 2022; Yen et al., 2018). For example, in an anatomy class in a medical school, students reported that the faster pace of online learning, technical issues, lack of hands-on examples, and distractions from social media were all barriers to learning anatomy in 2020 (Prabhath et al., 2022). Additionally, in 2020, teachers reported that following common barriers: “Hardware issues, Software

issues, Lack of technical support, Student resistance to technology, Student technology use skill level, Lack of training for [the educator], Lack of planning and implementation time, Class size, Connectivity issues, Lack of administrator support, [and] Lack of university vision” (Almusharraf & Engemann, 2020, p. 99). University students also struggled to engage with learning materials due to a lack of technical format for online learning (Dinh & Nguyen, 2020). The problem many educators have is not lacking knowledge of online resources, but a lack of knowledge and practice integrating technology with pedagogy or andragogy best practice (He & Xiao, 2020).

Some online instructors of higher education have expressed concerns around learning support for curriculum and around student-teacher communication (Yen et al., 2018a). The swiftness of the transition to online teaching in 2020 left many institutions struggling to maintain access to course content in a new platform that some institutions were not prepared for (Dinh & Nguyen, 2020).

Some potential barriers may be more personal. Even before the COVID-19 pandemic, Kebritchi et al. (2017) mentioned that isolation is a concern with online learning which may impact a learner’s quality of learning and identity. It is unknown if educators experienced this barrier in making the transition to online learning or if isolation was felt more intensely due to the additional quarantine requirements in 2020. Additionally, it may have been difficult for some course content to translate to an online format depending on how much teachers relied on peer interactions as part of the learning process (Gradišek & Polak, 2021; He & Xiao, 2020).

Online Teaching Benefits

Online teaching, sometimes called multimodal teaching, has many benefits. One benefit of learning technology is that students and teachers have the opportunity to be more connected due to a new format that is less hierarchal in structure (Almusharraf & Engemann, 2020). Teachers reported that they used more collaborative teaching styles in online formats, and were still able to use lecturing effectively via videos or synchronistic meetings with students (Almusharraf & Engemann, 2020). Junior high teachers in the mid-western United States identified that their transition from face-to-face to online learning was attributed to the following for themes: motivation through the challenge of adapting curriculum to an online format, teamwork which allowed them to use their coworker's strengths and encourage group brainstorming, and overcoming technology concerns which impacted the effectiveness, engagement, and quality of the material (Jocius et al., 2022; Marcum-Dietrich et al., 2022).

Middle school teachers reported that some benefits of online teaching included increased individualized instruction and understanding of their students, increased opportunities for students to practice self-directed learning which includes the pacing of their school work, improved ability for teachers to provide timely feedback on assessments and assignments, improved technological skills, and even enhanced family interactions (Bishop, 2021). Online teaching also includes the benefit of improving self-directed learning skills (Qin et al., 2022) through a greater focus on reflection and connection with course materials (Jocius et al., 2022). Teachers learning how to effectively use technology in teaching reported that the following computer program

functions were used effectively to engage students in learning: online versions of books, online instructional videos, and programs to help writing proficiency (Almusharraf & Engemann, 2020). Teachers who teach online have the following skills to be effective: they know how to prepare well, they have learned how to design curriculum for an online environment, they have an easy to understand online structure and learning scaffolding process and resources, they have clear roles and expectations for teachers and students, they have access to social interaction within the course, and they have a way to provide effective assessment and feedback (Fujita et al., 2021). In a medical school, adult students reported that to overcome the barriers to online teaching for their anatomy class they recommended that students be allowed to watch lectures that were recorded, improve their internet connections, use supplementary online videos, and decrease their use of phones during study time (Prabhath et al., 2022).

Online Learning Preparation and Outcomes in 2020

Online learning has many benefits when done with intention and in a timely manner. Knowing how online learning is instituted with purpose and time can help teachers and administrators understand how crisis-driven online learning impacts the effectiveness in junior high educator's ability to effectively apply self-directing skills. The choice of online learning equipment and knowing the teachers' skill levels can greatly impact the success the teacher has; additionally, if a teacher was unfamiliar with the equipment chosen then they would need additional and possibly individualized help to become proficient (Lysniak et al., 2019). In 2020, many teachers were unfamiliar with

how to use online teaching tools such as Google Classroom, Google Suite for Education, and Zoom which led them to be less effective in their teaching (Miyashiro, 2023).

When an educator knows that they will need to learn online teaching, like they had to transition in 2020, there is more investment and less resistance because it was learned and implemented by the educator's choice (Gacs et al., 2020). The choice with planned online learning also leads to more planning and preparation for educators who are exploring technology, teaching/learning theories, assessments, and long-term application (Gacs et al., 2020; Giles, 2018). Unfortunately, while the need to transition was there, the training alone was not sufficient for setting up teachers and students for success in online classrooms beginning with the 2020/2021 school year (Miyashiro, 2023). One study in China for educators of preschoolers was focused on implementing a more self-directed pedagogy during the pandemic shutdowns. In that study, it was reported that educators appreciated interactive learning modules, examples, and feedback from experienced teachers to help them implement the new pedagogical format effectively (Laws & Xun, 2021). Law and Xun (2021) reported that the training and implementation that these teachers participated in, resulted in increased trust with parents, improved communication, and greater personal self-directed learning skills. Communication and cooperation with parents is an important factor for success in online learning environments (Audah, 2021). Parents were reportedly grateful for the communication from teachers which allowed them to support their children's online learning experiences (Miyashiro, 2023). A plan for communication between peers, providing information to students, and increased support and training from administrators

should be available to educators. (Bishop, 2021; Gacs et al., 2020). Accountability on the part of the student and the educator is important to reenforce what information and skills are retained by the learner (Bishop, 2021; Lysniak et al., 2019).

Some instructors were able to have success with the sudden transition to online learning formats. Others did not have or struggled to have success with the transition. Instructors are adult learners and are often assumed to have the learning skills necessary to effectively manage change well. According to a longitudinal study regarding teaching outcomes before and after school transitions in 2020, it was discovered that goals, attitudes, and engagement with the problem had a contribution to the success or failure to adapt to changes (Bonds et al., 2021; Daumiller et al., 2021). Daumiller et al. (2021) reported that college educators that perceived the change to online teaching as positive, the change as lasting, and an opportunity to grow in their competency as professionals had better teaching outcomes according to student reports and were less likely to suffer from feelings of fatigue or burnout compared to college educators who did not. Some college educators did receive lower satisfaction scores from students during the semesters of transition to online learning (Baldo et al., 2020). Daumiller et al. (2021) also hypothesized that the stress connected with the sudden changes to online teaching may have had a negative impact on educator's wellbeing but more research needs to be done on this topic.

Junior High Educators during COVID-19

The pandemic changed how junior high teachers approached teaching (Miyashiro, 2023) and self-care. Junior high teachers in Hawaii reported feeling a variety of positive

and negative emotions such as overwhelmed by the change, and confident that they could adapt to the changes (Miyashiro, 2023). Due to the rapid changes in school formatting and availability, junior high teachers were concerned about their ability to continue to reach and teach their students, and they were also very concerned about the personal impact that school shut downs and quarantine would have on their own and their student's physical and emotional health (Fujita et al., 2021; Nadeem et al., 2022). Junior high teachers in Hawaii reported that it was difficult to reach and teach their students in a remote classroom due to students having their cameras off, not centered, or on in poor lighting (Miyashiro, 2023). Both teachers from that study reported that human connection was easier when they were able to have blended classes in 2021 because they were able to be more engaged and supportive of their students learning (Miyashiro, 2023). Similar reports from research about schools in China indicate that middle school teachers who held live video classes during the pandemic instead of pre-recorded lessons allowed teachers to maintain the important connections of mentorship with their students (Bishop, 2021), which allowed them to decrease some of the stress for their students around loneliness. The loneliness and distance of COVID-19 shutdowns contributed to increased stress for teachers which left them feeling burned out in their work.

Teachers were also expected to manage their work throughout the day, care for their own families, and prepare lessons with less distinction between work hours and family life (Rabaglietti et al., 2021). Some educators were able to receive instruction on the district level about how to access and implement online learning, and were instructed by their individual schools about how to continually provide support and community to

their individual students (Nadeem et al., 2022). However, the initial transition to online instruction was determined by what technological resources were available at the time and some instructors may have not been very proficient with using it (Rabaglietti et al., 2021). The lack of proficiency recognized by most educators increased stress and decreased self-efficacy (Rabaglietti et al., 2021). To further complicate matters, some community shareholders did not believe that teachers were working sufficiently because students were learning from home despite teacher efforts (Miyashiro, 2023). This inconsistent support from the community increased stress for teachers during the pandemic, and we can clearly see that not all resources were allocated equitably.

Some schools in the United States tried to make sure all students had access to technology to continue to access their classes, but funding did not sufficiently provide for such equanimity (Marcum-Dietrich et al., 2022). Gula (2022) reported in a reflective qualitative study that some speech teachers at the junior high level in Pakistan struggled with students having low motivation or unstable internet connections which often led to a need to alter course materials or delayed submissions; the speech teachers had to reach out more frequently to students in order to reconnect them to their speech class. Additionally, Gula (2022) reported that the changes in the school system made it difficult for educators to teach, and miscommunication with students and their parents became a concern during the pandemic.

Other junior high educators had to find their own coping skills in 2020. English teachers in Indonesia had to find the right balance to have a blended classroom, and identified what parts of learning had to be offline and which parts had to be online so that

they had enough time to teach and clarify the course content (Ramdhani & Kholidi, 2021). Ramdhani and Kholidi (2021) report that junior high teachers of English found benefit in talking with administration to clarify teaching expectations, and to their coworkers for professional support during COVID-19, and they reported talking with their family for emotional support. English junior high teachers in Indonesia were able to practice creativity by making their own videos or sharing more media files with their students (Ramdhani & Kholidi, 2021). To solve the concerns around internet use and connectivity, teachers reported using various servers to still use data, open areas with a good internet connection, or the school itself to find a better connection (Ramdhani & Kholidi, 2021).

Junior high educators as adult learners did not come away from the pandemic with only struggles, they also were able to use their experiences to make improvements. In northern New England, junior high teachers reported that during the pandemic they were able to improve in six areas, as reported by Bishop (2021). Some junior high teachers reported they were able to get to know their students on a more individual basis through on-on-one meetings which allowed for more personalized instruction and being able to determine emotional and social developmental needs. Some junior high teachers were able to better meet individual student needs by developing personalized lessons and instructions based on a student-directed strategies. These student-directed strategies allow students to practice the self-directed learning skills of leaning at their own pace and allowing students to make more choices about their learning. Additionally, Bishop (2021) reported that junior high teachers were able to improve their ability to assess their

students' learning through having more time for thoughtful feedback from a variety of available technologies; further, this allowed them to notice the variety of ways that their students showed proficiency with the learning materials. During COVID-19, junior high teachers were able to partner more effectively with families through increased communication to support parents and guardians in their own role as teachers, as well as helping support family needs. Finally, Bishop (2021) reported that junior high teachers reported an improvement with their ability to use technology due to necessity, but allowed them to challenge their own biases about online learning and be able to use technology effectively for feedback and tracking student progress. However, Bishop (2021) highlighted that not everyone was able to find positive outcomes due to the stress and overwhelm they experienced during the pandemic. It is unknown why not all teachers were able to learn and grow as individuals and professionals during the pandemic.

Junior High Teachers and Self-directed Learning

Educators of all grades have many obligations to their students, their schools, and the regulations from administration and government about curriculum, but little is known about the teacher's choices and actions in their respective roles (Giles, 2018).

Additionally, policies and procedures may have needed to be adapted to meet the needs of students in a new learning environment.

Once again, some reflection on self-directed learning comes from international studies. For example, junior high teachers in Indonesia were more favorable of a blended class format than elementary school teachers, and were more concerned about learning outcomes than the health of their students compared to elementary school teachers who

reported a preference for face-to-face classroom formats (Audah, 2021). In Saudi Arabia, educators have not been able to have their concerns about professional development influence the training they have received and some of the training that they receive is not applicable in the classroom beyond a theory of learning (Alshaikhi, 2020).

Educators in Pakistan also expressed that administration often helped with knowledge around how to use modules, and other technical issues, but did not provide sufficient training or effective tools if the students could not access the modules (Gula, 2022). Some training provided by educational administration in Saudi Arabia was reported to be too narrow in scope and research has shown that training is good as long as it meets the needs to the teachers and models practical solutions to their professional concerns (Alshaikhi, 2020). Additionally, training that includes self-directed learning elements such as observation, reflection, teaching, and assessment allow educators to be more active in their learning and bridge the gap between learning theory and practical application (Alshaikhi, 2020; Franco, 2019). A significant factor of professional growth comes from the self-directed learning technique of professional and collaborative communities in the workplace in order for educators to bridge the gap between learning theory and practical application (Alshaikhi, 2020).

This development of self-regulation and autonomy can be hindered by miscommunication or assumptions about roles that may be inaccurate and delay a teacher's ability to get the support they need or get the students the knowledge and help they need (Giles, 2018). Some researchers have stated the need for more adaptive educators who are teachers with sufficient self-directed learning skills, self-awareness of

their own strengths and weaknesses, and a mastery of foundational knowledge to adapt their teaching method and style to effectively meet their students' needs (Alshaikhi, 2020).

Junior high teachers are expected to differentiate their teaching to meet the unique needs of their individual students (Malacapay, 2019). Differentiated teaching has many benefits including but not limited to: promoting a student's abilities, providing learning growth for all learning types, increase self-sufficiency and competency, and an overall increase in positive results with an effective learning experience (Malacapay, 2019). Educators are expected also to make sure the students with the least skills are able to develop the skills and strategies necessary for their success; skill level and attitude are important factors in the learning process (Tseng et al., 2022; Lysniak et al., 2019). Junior high teachers in Japan were concerned about their ability to teach effectively and wondered if their students had the motivation, diligence, and emotional intelligence to study on their own with less oversight from them (Fujita et al., 2021). Teachers in Indonesia were able to use qualities of self-directed learning such as "open[ness], reflective, creative, and adaptive to the rapid changes of technology and circumstances in the education field" (Ramdhani & Kholidi, 2021, p. 807) to improve outcomes during COVID-19.

A key component of self-directed or personalized learning, as discussed above, is goal setting, in which the teacher acts as a guide to help student's individual goals have a practical path to reach their educational and career goals (DeMink-Carthew et al., 2017). Goal setting allows for greater personal investment and autonomy in the learning process

for students if it includes student interests and skills with guidance from the educator, which supports the goals of middle school education to have learning be a supportive and challenging experience for the student (DeMink-Carthew et al., 2017).

Collaboration is another significant factor in self-directed learning and a standard in professional learning (Bonds et al., 2021). Collaboration can take many forms such as coaching, consultation or even co-teaching (Barton & Dexter, 2020; Mofield, 2020). Mofield (2020) stated that peer-coaching specifically is so important and effective, that some schools have come up with a good system for collaboration for in-person teaching. Benefits of collaboration in teaching include increased support from a peer, new insights and perspectives, increased confidence, increased excitement and engagement for both students and teachers, and an increased flexibility in how teachers viewed students more positively (Mofield, 2020). The biggest barrier to collaboration is lack of administrative support as it pertains to time management and views of learning groups (Barton & Dexter, 2020; Mofield, 2020). Mofield (2020) discussed that many teachers are doing so much that it may be very difficult to coordinate with their peers effectively, and a belief that gifted students (for example) will be fine without support can lead to a lack of investment in co-teaching that population more effectively. During the COVID-19 pandemic, administrators did not provide training for online learning expectations until August of 2020 and teachers reported that the training was not sufficient for success in the 202/2021 school year (Miyashiro, 2023). Research continues to affirm that self-directed learning traits such as collaboration are viewed positively, but individuals lack the ability to apply it effectively without more support.

In many cases, teachers are successful when they have a feeling of self-efficacy. Self-directed learning for junior high-level educators can improve feelings of confidence, and helps them improve their ability to adapt to changes and deliver their teaching effectively to students (Alshaikhi, 2020). Teachers have also stated that it is their responsibility to continue to develop as professionals, and while this should be a joint responsibility with the institution, the teacher is not exempt from the responsibility of pursuing their own learning and growth in their field (Alshaikhi, 2020). This stated self-responsibility conflicts with teachers not taking a more active approach to the educational system concerns that happened in 2020.

Professional Competence

All educators are required to remain up-to-date on learning strategies and methods as new teaching strategies are introduced, curriculum changes, and technology evolves. Self-directed learning for educators is a life-long process because “teaching is the profession of learning” (Alshaikhi, 2020, p. 1364). Education is a field where there are ongoing changes in curriculum, expectations, and technologies, and they need clear support in understanding how to integrate technology and improve their self-efficacy (Jocius et al., 2022). Research has shown that teachers who were more intrinsically motivated instead of externally motivated were found to be more self-directed and participatory in mandatory professional development courses and activities (Jhang, 2020). This motivation is reflected in the assumptions of adult learning theory. Knowles’ adult learning theory has six assumptions, specifically the concept of self-directed learning, which should be part of professional development curriculum:

1. As a person matures, his or her self-concept moves from that of a dependent personality toward one of a self-directing human being.
2. An adult accumulates a reservoir of experience, which is a rich resource for learning.
3. The readiness of an adult to learn is closely related to the developmental tasks of his or her social role.
4. There is a change in time perspective as people mature—from future application of knowledge to immediacy of application. Thus, an adult is more problem-centered than subject-centered in learning.
5. The most potent motivations are internal rather than external.
6. Adults need to know why they need to learn something (Malik, 2016, p. 49).

Those who create continuing education training modules should be mindful of the assumptions of adult learning theory. These assumptions can be a design guide for professional development that allow teachers to “think deeply, connect across school communities and disciplinary boundaries and engage meaningfully with big questions about teaching and learning” (Jocius et al., 2022, p. 548). Knowing about andragogy and the experiences of educators can improve the motivation and engagement of the teachers participating, and improve the application of the information presented in continuing educational trainings.

Researchers have proposed that it is best if educators become “adaptive experts,” according to Sawyer et al. (2022, p. 99), becoming an educator who continually participates in continuing education to add to their knowledge and skills. This can be

done with communities formed which are dedicated to continuing education and professional development (Slack, 2019). Elements of professional competency include previous knowledge (especially around technology), a desire and plan to be adaptive to change, and creative in ways to remain connected with students whether online or face-to-face (Sawyer et al., 2022). Studies have shown that a “teachers’ positive attitude towards self-directed PD [professional development] is associated with higher rates of active participation” in professional development courses (Jhang, 2020, p. 91). Professional development also focuses on learning transformation as knowledge and practice blend for improved student outcomes (Giles, 2018; Sawyer et al., 2022).

In a review of the literature, it was found that administration held a vital role in making sure teachers had sufficient planning time and appropriate trainings to develop the skills of collaboration (Giles, 2018; Mofield, 2020), an element of self-directed learning. Olofson, et al. (2018) provided an assessment called the Teacher Practices for Personalization Survey to determine how junior high educators met the individual needs of their students in face-to-face and online teaching environments. They determined that the survey was a valid instrument that could be used for further assessment as the trends of education are becoming more self-directive for younger students. Professional development can also occur independent of courses as educators look up their own resources or seek consultation, support, or recommendations from their peers (Barton & Dexter, 2020; Slack, 2019). This independent self-directed learning is usually geared more toward an educator’s personal interests and goals in their professional development (Barton & Dexter, 2020).

In contrast to strategies that promote self-directed learning, Barton and Dexter (2020) identified teaching methods that were good, but some were not sufficient to produce independent, self-directed learners in the field of professional development, especially in the context of online learning. First, teacher-centered instruction is good for verbal connection, but was insufficient to influence change in isolation and sometimes was not in alignment with a teacher's needs (Barton & Dexter, 2020). Second, informal learning in collaboration with like-minded peers improves interaction with action-oriented content and experiences which promote reflection on their ability to attain mastery (Barton & Dexter, 2020; Slack, 2019). Third, teachers who sought independent learning were able to find and practice with technology beyond administrative expectations and were able to have deeper reflections on their levels of mastery and increase their confidence in the classroom. (Alshaikhi, 2020; Barton & Dexter, 2020). Fourth, a blended format of content involves both synchronous and asynchronous methods of learning, which allows for teachers to be present and allow students some independence (Miyashiro, 2023). Blended formats are initiated by a course leader and then student-centered application provides for improved self-efficacy, reflection, and is personally relevant to the learner (Barton & Dexter, 2020; Slack, 2019). Junior high teachers reported that they prefer blended teaching formats over traditional formats (Audah, 2021). However, teachers must be mindful that students are not left behind in the asynchronous portions of blended learning (Miyashiro, 2023). Effective strategies can help educators and students have success across curriculum areas, increase transfer of

knowledge and the eventual independence of learning with the student choosing the strategy they need with success (Barton & Dexter, 2020; Sperling et al., 2016).

There are many benefits to online learning as explained above. Additionally, the skills identified for self-directed learning are identified through the literature. The literature often speaks of professional development in terms for adult learning for working professionals. It is established in the current literature that competencies are needed for technology-based education, and the principles that define self-directed learning. Professional development, like any other type of learning and teaching, should be holistic and student-centered regardless of the age of the student (Barton & Dexter, 2020). Other researchers agree that teachers need more training in technology and pedagogy, areas of weakness in professional development that were revealed due to the COVID-19 pandemic (Ramdhani & Kholidi, 2021).

Before the pandemic, there was a need for more professional development around learning technologies. Seifert, et al. (2019) reported that educator's technological competency still needs to be developed. Jocius et al. (2022) reported that the efficacy of professional development in making lasting change was being questioned. Jocius et al. (2022) reported that after years of providing professional development training for junior high and high school teachers about the use of technology in the classroom, they were able to support teacher self-efficacy, lesson implementation, teacher learning, and teacher engagement in the courses provided through 2020. In their study on the courses provided in 2020, one junior high teacher reported that the chat option in the class was helpful to see the insights that other participants were able to express in an asynchronous

environment; participants further noted the benefits of having both synchronistic and asynchronistic environments for learning success, and connection to the learning community. Additionally, junior high teachers reported that having clear support that recognized their skill level, and hands-on practices with rewards were helpful in increasing engagement and motivation, and teachers reported that they felt supported so that their goal for the training could be met successfully (Jocius et al., 2022). Jocius et al. (2022) reported that the professional development course on technology use in 2020 was successful in creating online communities through appropriate levels of support and learning scaffolding is in place which will improve the quality of a teacher's learning opportunities and interactions with their professional peers, and allow the teachers to apply what they learned first-hand in their classrooms.

Summary and Conclusions

In 2020, face-to-face schools temporarily closed due to a worldwide pandemic. The solution: transition from face-to-face to online schooling. The necessity of changing from face-to-face to online teaching due to the coronavirus in 2020 has resulted in numerous research studies on the various challenges the pandemic offered from a variety of perspectives. Most of the studies about this transition have been quantitative. For example, several studies found that teachers in different parts of the world struggled with access and competency with teaching technologies, knowing how to connect with students in an online environment, and establishing a good learning environment from home (Barton & Dexter, 2020; Tseng et al., 2022; Gradišek & Polak, 2021). Quantitative researchers also found that teachers who transitioned from online teaching had access to

resources from their administration, and sufficient skills and knowledge to design online curriculum and social interactions (Fujita et al., 2021). Middle school teachers reported through qualitative research that they were able to develop more individualized instruction and help their students practice their own self-directed learning skills throughout the pandemic (Bishop, 2021; Qin et al., 2022).

Unfortunately, most face-to-face schools and teachers were not ready to have all curriculum, all communication, and all support online due to a lack of familiarity with and competency with Information and Communication Technologies (Gradišek & Polak, 2021). Some teachers were lacking readiness due to higher-than-normal levels of anxiety due to the pandemic (Ak & Gökdaş, 2021). Teachers all over the world experienced problems with internet connection (Gula, 2022; Nuere & de Miguel, 2020; Prabhath et al., 2022), as well as a lack of training and support from their school's administration (Alvi & Gillies, 2020; Fujita et al., 2021; Giles, 2018; Prabhath et al., 2022; Sawyer et al., 2022), which impacted the quality of education in 2020 with few exceptions. Even before the pandemic, teachers had struggled to help maintain motivation for their students, though research on junior high teachers specifically was sparse. This motivation was seen to decrease during the pandemic as teachers were not used to a more student-focused, self-directed learning format that is online teaching (Ak & Gökdaş, 2021; David & Grosu-Radulescu, 2016; Fujita et al., 2021; Gradišek & Polak, 2021). Online teaching is a more self-directed learning format which can be very effective if educators are properly trained, prepared, and supported (Gacs et al., 2020; Mouchantaf, 2020; Nadeem et al., 2022; Peimani et al., 2021).

Little research was found, qualitative or quantitative, regarding self-directed learning in the United States during 2020. This study may provide insights on these educators' use of self-directed learning principles and skills. While a personal process, self-directed learning is most successful with support and learning scaffolding (Alvi & Gillies, 2020; Gradišek & Polak, 2021; Slack, 2019). Many teachers reported a preference for a blended teaching format: part online and part face-to-face for best learning outcomes (Audah, 2021; Yen et al., 2018). Still, we do not know what junior high teachers experienced in their own self-directed learning journeys in 2020. While this study will look at the experiences of junior high educators in their role as adult learners, it is important to acknowledge that they also had the role of instructor as they transitioned from face-to-face to online formats. It is unknown if junior high educators were able to use their self-directed learning skills to overcome the following common concerns: redefining their role as instructors; adapting their teaching styles; changes in communication methods with students, other faculty and administrators; time and interest for investing in online courses; and (as mentioned above) possible changes in content and teaching styles to meet the needs of students in a new online learning environment (Kebritchi et al., 2017). This study will also offer insights specific to the lived experience of these teachers using the approach of descriptive phenomenology.

In Chapter 3, the methodology for the study and the research design and rationale will be presented. The role of the researcher, the methodology, issues of trustworthiness, and ethical procedures will be described.

Chapter 3: Research Method

Introduction

The purpose of this qualitative study was to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching due to the COVID-19 pandemic. The focus was on the period from March 2020 to September 2020 when they would have spent time preparing for online teaching requirements in the 2020/2021 academic year. In this chapter, I discuss the research design and rationale, my role as the researcher, and the methodology. In the research design and rationale section, I explain the descriptive phenomenological research design and my rationale for its use in this study. The methodology section follows, which describes participant selection, the strategies used for sampling and selecting participants, and my instrumentation. Procedures used for recruitment, participation, and data collection, including ethical procedures and the data analysis plan are explained. I also address issues of trustworthiness and my subjectivity and reflexivity in this section, including issues of credibility, transferability, dependability, and confirmability. The chapter concludes with a summary.

Research Design and Rationale

The research question for this study was developed due to a lack of qualitative research on junior high teachers in the United States during the COVID-19 pandemic. Past research explored junior high student outcomes, and some professional development for junior high teachers (Bishop-Monroe, 2020; Jhang, 2020b; Teng & Wu, 2021). However, little research has been done using a qualitative methodology. The question

that guides this research study was as follows: How do junior high school educators describe the lived experience of self-directed learning in the transition between face-to-face teaching and online teaching during school shutdowns during 2020? Specifically, the research covered the time frame from March 2020, when school shutdowns occurred in the United States, and September 2020, when teachers were required to have online teaching as the primary teaching modality due to the Coronavirus Pandemic.

The research approach was phenomenological in order to study the phenomenon through the context of human experience (Dowling, 2007) with human beings as the sources of the subject matter to fill in the gaps of humankind's self-knowledge (Giorgi, 2019). Phenomenology was originally a philosophy and a method concerted with the structures of the phenomenon that can be in conscious awareness expressed initially by Edmund Husserl (Giorgi, 2009; Husserl, 2017). With this attitude of curiosity, Husserl recommends that it is vital to understand the essence of the phenomenon and then deepen the understanding of the phenomenon through experience. Description of a phenomenon is different from the construction of a phenomenon, and both are separate from an explanation, for example, causes (Giorgi, 2009). Description, construction, and explanation lead to the methods of reduction, which take a phenomenon from general to more specific understandings. Husserl in 1983 "point[ed] out that the perception of an object in the natural attitude often includes the positing of the existence of the object" (Giorgi, 2009, p. 90).

Descriptive phenomenology, as developed by Amadeo Giorgi, was the specific research approach used to answer the research question. Giorgi described the

phenomenological approach as a way to look at human experiences holistically by hearing the actual experiences of the people who experienced them (Giorgi, 2012). In 2009, Giorgi described phenomenology as “a method of investigating the structures of consciousness and the types of objects that present themselves to consciousness” (p. 87), and that data for psychological phenomenology “must come from multiple persons.... [and that] the unity of the consciousness of each person must be respected.... [A] single structure [emerging] from the data would have to be accomplished holistically and relationally” (p. 102). He stated that, as a field, psychology needs to study humankind’s detailed behavior, feelings, and experiences in order to understand how individual perceptions differ from the “life-world” and how to validate the data accurately (Giorgi, 2019, p. 95).

According to Morrow, Rodriguez, and King (2015), phenomenology focuses on understanding the framework of the phenomenon of study to know what it actually is. van Manen (2017) added to this discussion by providing a simple explanation for what phenomenology is: it is looking at meaningful life moments with the intent of understanding it from the perspective of the person who experienced it. In the year 2020, many life events happened that could be subject to phenomenological inquiry, and what comes into consciousness for learning often takes time. Errasti et al. (2018) postulated that phenomenology as a research method can be supported by reflective writing. Such may be used as a source of data for this research due to the time difference between the phenomenon and when the research is conducted. Peimani and Kamalipour (2021) reported that one of the important goals of academia is reflection, and that reflection is

necessary, especially in the face of emergency changes to educational formats that occurred in 2020.

Transformational or descriptive phenomenology is focused on the structure and essence of a phenomenon, which can be found in learning about a life event from a person who experienced it. It is a means to studying the psychology of the daily concerns of a regular human experience (Giorgi, 2019). For Giorgi (2019), the phenomenon being studied is more important than the experience of the scientific inquiry. Giorgi (2019) described descriptive phenomenology as intentionally learning about and exploring the elements of a phenomenon that are found through empirical analysis before putting the pieces together for a more complex picture of the phenomenon being studied. He quoted other researchers who described descriptive phenomenology as a way to understand the human mind and that psychology can be used to identify and highlight details, which can lead to clarification and resolution of phenomenon definition and experience (2019). Additionally, with descriptive phenomenology, a researcher is not seeking causality but rather what makes the phenomenon the phenomenon by finding the core elements (such as processes, values, intersubjective data, interpersonal data, or beliefs) that define it (Giorgi, 2019). One of the elements that deserve analysis in descriptive phenomenology is the questioning of assumptions about the phenomenon to better understand what is true about the human experience generally, and by psychologically studying the human experience, descriptive phenomenologists help us understand a more comprehensive definition of the human experience (Giorgi, 2019). Giorgi (2019) stated that meaning-making comes from experiencing the world and that to remain open to phenomena then,

we must see how meaning and perspectives are experienced and understood, explore the process of the development of meaning and the value that is placed on the experience of the phenomenon which already exists. Because “the primary goal of descriptive phenomenology is to better understand a phenomenon as experienced by a participant in their lifeworld” (Jackson et al., 2018, p. 3311), this research was designed to discover more details about the phenomenon of self-directed learning experienced by junior high educators. Giorgi (2019) stated that phenomenology is uniquely suited to study the phenomenology of learning through questions such as how a learner experiences a learning task: time, feelings, behaviors, as examples. Semistructured interviews were used to identify self-directed learning experiences in various aspects of change, such as infrastructure change and educator competence (Safta-Zecheria et al., 2020).

Role of the Researcher

The role of the researcher in Giorgi’s descriptive phenomenology is to open-mindedly understand the framework of a phenomenon non-judgmentally, uncovering the important aspects of a phenomenon and revealing them as they were experienced by the participants in a dialogue between the data and the researcher’s own views and approach (Giorgi, 2019). This includes looking at everyday things as they are experienced, not as how they are generally accepted in society (Giorgi, 2009). A descriptive phenomenologist deals with understanding the experience of an observable phenomenon and describe it in their own terms without reducing them to psychological concepts (Giorgi, 2019, 2009). The elements of a phenomenon can be discovered as objectively as possible through interviews or self-reflective writing of research participants (Errasti-

Ibarrondo et al., 2018). It is the role of the researcher to present the data clearly so that the framework of the phenomenon becomes clearer. Giorgi (2019) specifically stated that the researcher should study how the phenomenon appears, specifically, how the phenomenon being studied is meaningfully distinguished from other phenomena and that any confusion around the definition of the phenomenon gains greater clarity through the research (Giorgi, 2019). Also, Giorgi (2019) stated that it is important for the researcher to remember that the data are important to the participant since this situation was theirs to experience, and the researcher's primary frame of reference is about the relationship between the subject and the phenomenon. The researcher raises an experience into more conscious awareness what already exists.

Giorgi (2019) stated that phenomenology is not satisfied with the work of one researcher. He asserted that each researcher has a limited viewpoint and stated that their results with the expectation that other researchers will duplicate the research and refine it until more truth is known and more falsehoods disregarded because truth is found in the existence of the phenomenon itself (Giorgi, 2019). Thus, it is important for future phenomenological researchers to duplicate studies and firmly establish the essence of the phenomenon being studied.

Methodology

Participant Selection Logic

Participants were selected from junior high schools or middle schools in the western United States. The participants were selected using purposeful criterion sampling (Moser, 2018). The inclusion and predominant criteria were that participants were over

the age of 18 years, and were employed as teachers for grades 7 through 9 from before March 2020 to December 2020. The research literature has shown that the coronavirus pandemic impacted teachers all over the world; participants in this study must have experienced a change in teaching methods from face-to-face learning to online learning due to the school shutdowns which were required in 2020 due to the COVID-19 pandemic.

Teachers were recruited through social media. School districts are not required to contact the participants due to participants being adults who consented to volunteer their time for an interview about their self-directed learning experiences from March 2020 to September 2020. Junior high teachers who volunteered were contacted through email to schedule an interview time with the researcher. Interviews were conducted over Zoom.

Descriptive phenomenology does not require many participants to clarify the essence of the phenomenon being studied; therefore, a minimum of four to six teachers were sought for interviews about self-directed learning experiences in 2020. Saturation was met when the properties of the phenomenon: self-directed learning as experienced by junior high teachers in 2020 was reached.

Instrumentation

Data collection was completed via interviews using Zoom, an internet-based teleconference program that allows the researcher to record and auto-caption an interview. These interviews were recorded with captions available. Participants were also encouraged, if they have kept a journal, to share journal entries written in 2020 to share relevant entries of their lived experience of self-directed learning. These personal journals

may hold relevant data needed to identify and described lived experiences as they were experienced by the participants and, if provided, would only be discussed during interviews with individual participants. The researcher would never have access to the journal entries directly. No journal entries were discussed or shared by any participant during the interviews. Therefore, this data was not included. Interviews conducted over Zoom are considered sufficient to establish sufficiency of data collection as it allowed me to ask relevant questions and participants to answer with the details of their lived experiences.

The interview questions were shaped by the literature and the philosophy of the phenomenological approach with a focus on the experience and elements of self-directed learning from March to September 2020. For example, Giorgi (2009) recommends asking for information through a generic request for the participant to describe a situation in which they experienced the phenomenon of study.

Content validity was established through member checks and reflexivity. Member checks allowed participants to confirm that the researcher was able to correctly gather and interpret the data. Reflexivity helped the researcher be aware of biases that might have occurred as I created and asked the research questions, and as the data was analyzed. Content validity was established through the diversity in locations of participants as they worked from a variety of schools located in the western United States.

Procedures for Recruitment, Participation, and Data Collection

Participants volunteered by responding to an ad on the social media platform, Facebook. The data came from a one-time interview with participants. The duration of the data-gathering interview was between 20 and 60 minutes. Data was recorded with the Zoom record function. Six teachers were interviewed by the researcher through Zoom about their self-directed learning experience(s) from March 2020 to September 2020. Participants were debriefed by having them provide clarification during the interview but not after the interview. They were provided a selection from the interview to confirm accuracy of the information gathered. Participant data was accepted as it is described by the participant in the initial interview. Data collection started with well-defined qualitative questions (Giorgi, 2019). This is an important feature of descriptive phenomenology since the researcher does not return for follow-up data collection.

Data Analysis Plan

The data gathered answered the following question: How do junior high school educators describe the lived experience of self-directed learning in the transition between face-to-face teaching and online teaching during school shutdowns during 2020? In descriptive phenomenology, epoché, also known as reduction (Errasti-Ibarrondo et al., 2018) has two levels of analysis in order to understand the essence of the phenomenon of study through comparing it to our past experiences with it (Giorgi, 2009). An important aspect of psychological reduction is that each concept must be clarified to increase truth and reduce falsehood in identifying the phenomenon of study (Giorgi, 2019).

When collected, the data were passed through two reductions to arrive at the level of phenomenon (Giorgi, 2019). The first level of reduction is designed for researcher to look at the experience of the phenomenon, looking for general themes. This first level, commonly referred to as bracketing, provided information about what the participants felt, heard, planned and other internal and external experiences. The second level of reduction is allowing the phenomenon to speak for itself and the researcher gets a clearer sense of the true essence of the phenomenon itself (Giorgi, 2019) indicating a more in-depth look at what self-directed learning skills were implemented, if any in 2020. The data must also reflect internal and external viewpoints which are important for the participant to make meaning of a phenomenon (Giorgi, 2019). Descriptive phenomenology data must come from lived experience, and must be analyzed to the simplest elements to understand what the phenomenon of study is.

Issues of Trustworthiness

Trustworthiness in this research was established through the following four criteria: credibility, transferability, dependability, and confirmability. Credibility is also known as internal validity and establishes the strategies used to establish it. Transferability is also known as external validity and is used to describe appropriate strategies to establish it. Dependability is also known as reliability for qualitative research and is used to identify strategies to duplicate this research in the future. Confirmability is also known as objectivity. Confirmability is used in qualitative research to describe strategies to establish objectivity.

Credibility

One way to establish credibility is a member check. To establish credibility via member checks on the data, I emailed a summary to participants, no more than two pages, of my understanding of the data in the interview to ensure my understanding of the data. Participants had the opportunity to confirm or clarify my interpretation of relevant information, but not change their original statements. Additionally, I used reflexivity to manage my own biases in the data collection and analysis process.

Transferability

To establish transferability, I interviewed teachers from different schools and school districts within the western United States. In the next chapter, you will see that I used rich description of their lived experiences with self-directed learning in 2020, and of the phenomenon that they experienced as self-directed learners, as well as, shared pertinent background information. The variations found within schools may indicate institutional differences that may impact how self-directed learning was implemented or supported. The transferability is anticipated to be low for this study due to its focus on teachers from one area of the country, and the small number of participants; however, further research can be done to expand the possibility of transferability.

Dependability

As I set up my research project and establish dependability, I consulted with my dissertation committee so that my interview questions could be duplicated in future studies, further consulted with them on interview protocol, and for confirmation that the questions were in alignment with phenomenological research and trustworthiness.

Additionally, I used reflexive journaling to observe my own thoughts, feelings, impressions, thoughts, and assumptions which emerged as I designed the research study. I continued to use reflexive journaling as I gathered data from participants.

Confirmability

I used reflexive writing as one strategy of confirmability to prevent my subjective biases from interfering with my objectivity as a researcher. As someone who has had minimal experience in the education field, and coming from an outside perspective, it was important to recognize how my experiences and assumptions shape the findings in this study. Reflexivity also allowed me to factor in my own experiences as an adult learner and how they possibly impact the findings, conclusions, and interpretations of this study (Creswell, et al., 2018).

Ethical Procedures

The ethical procedures for this study followed Institutional Review Board (IRB) guidelines. No more than six junior high teachers' data was needed to reach significance. Interviews were held over Zoom, an online video platform which will allow for ease in transcription, data collection, and data storage. During data collection over Zoom, the Zoom room was locked so that the digital location was secure. During the interview, the interviewer and the interviewee were in private physical spaces from other people to limit and avoid interruptions.

Security measures for the data will continue post data collection as follows: data will be stored on my own device that only I control. Data will be appropriately coded and any identifying information will be stored separately. Data storage will be stored in a

secure location. Any potential physical forms of the data will only be accessed by me. I will be the only one with access to electronic forms of data. A screen lock is already in place on the data storage device I have. Devices were updated and have current anti-virus software. I did not conduct an anonymous online survey, and all necessary precautions for participant anonymity have been taken. Data collection procedures were supervised by Doctoral Chair, Dr. JoAnn McAllister. Data will be stored on an external storage device which will be erased after five years post-research.

Any participants contact information obtained during the recruitment process will remain 100% confidential in the research presented and stored separately from the research data. The research is not about a topic involving stigma. Demographic information such as years of experience in a job may be necessary for the research, and such information was be shared in a manner that will prevent readers from deducing a participant's identity.

Participants signed a confidentiality agreement as part of the recruitment process to provide clarity for participants about their rights. If a potential participant did not meet criteria, I acted graciously and respectfully to all potential participants. Part of the consent form included an easy-to-understand section about my mandated reporting responsibility due to my professional work as a mental health counselor in Utah, located in the western United States. Consent and procedures for this study were presented to the participants as part of the confidentiality agreement, and were reviewed with participants prior to the interview. Informed consent was appropriately documented.

The consent form documentation was provided by Walden University and was tailored for this specific study. This consent form explained inclusion and exclusion criteria, provided a clear explanation of the purpose of the study, and included an understandable description of the time commitment and data collection procedures. The consent form clearly stated that participation is voluntary and the participants have the right to decline or stop their participation at any time. This consent form clearly stated that no more than six participants will be required for this study. A description of the risks, benefits, and privacy of the study were clearly stated. Potential conflicts of interest were clearly stated. Further, the consent form was free of any language which would waive the participants legal rights. Contact information for the researcher and the Research Participants Advocate were provided. A statement that participants should keep a copy of their consent form was also on the form.

There is a potential for discussion about how the information from the study may improve professional training for teachers and a focus on refining training to promote mental health and support in the educational field. Discussions of themes may be appropriate in the future. Participants will be provided a way to access the completed dissertation to have access to and learn of the study's results.

Risks

There was minimal psychological risk for this study. Potential minimal psychological risks include: the participant may remember stressful times in their personal life that occurred during the time-frame of the phenomenon in question. There are no relationship risks with recruiting and interviewing participants. I do not have any

professional connection to the participants in this research. There are no legal risks involved in this research. There are no economical or professional risks involved in this research. Any other potential risks are not present in this research. To minimize the potential psychological risk, participants will receive free recommendations for local mental health services if the interview topic upsets the participants. No aspect of this study is experimental.

The purpose of this research was to gain new knowledge about personal experiences of self-directed learning. This new knowledge was acquired through online interview to make information decimation easy for all participants and the researcher. This allowed for greater flexibility in scheduling time for the interview in order to reduce the burdens on the researcher and the participant. A potential burden that may have interfered with this is process was any interference with internet connection. No organizations were partnered with to identify participants or data collection. No raw data was or will be shared with anyone outside of my university supervisors.

Summary

In this chapter, I discussed the research design and rationale, explaining my reasoning for using descriptive phenomenology for this study, including its limits and benefits. Further, I explained my role as the researcher to open-mindedly explore the phenomenon in question: self-directed learning. The methodology section was complete with information surrounding the procedures for recruiting junior high teachers as participants, how interviews were conducted, and how data was collected and analyzed. I also addressed issues of trustworthiness through the criteria of credibility, transferability,

dependability, and confirmability. Finally, ethical procedures were explained based on the IRB requirements of research conducted through a university. In the next chapter, data collected through interviews will be presented and analyzed.

Chapter 4: Results

Introduction

The research literature around the self-directed learning abilities of junior high teachers is limited, and most of the research about adult self-directed learning primarily discusses observable aspects of the learning process. This qualitative phenomenological study was designed to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching due to the COVID-19 pandemic. This study used Giorgi's descriptive phenomenological method to understand the lived experiences of self-directed learning in 2020 described by junior high teachers. The research question that this study was designed to answer is as follows: How do junior high school educators describe the lived experience of self-directed learning in the transition between face-to-face teaching and online teaching during school shutdowns during 2020?

This chapter provides a discussion on the setting in which the participants were involved in the study, followed by a brief description of the relevant demographic composition of the participants in this the study. Further, the specific methodology used to gather and analyze the data is discussed in this section. Evidence of the trustworthiness of this study is also provided. This chapter is concluded by a presentation of the study results and a chapter summary.

Settings

The interview setting necessitated an environment that facilitated minimal disruptions and ambient noise for good sound quality in the interview recording. The

interview space at my home or work office was secure during the interviews, and I booked an hour for each participant. The participants were advised to find a space conducive to an online meeting for their interviews that ensured privacy. The interviews were conducted comfortably and informally, resembling a typical conversation. No participants reported any type of personal or professional change, disruption, or other trauma that impeded their participation.

Demographics

All included participants for this study were individuals who taught grades 7, 8, or 9 during the 2020 calendar year. They worked in the western United States (identified geographically as California, Washington, Oregon, Arizona, Utah, Colorado, Nevada, New Mexico, Idaho, Montana, Wyoming, Alaska, or Hawaii) in 2020 during the pandemic, and they experienced a transition to online teaching in that same year. This study had six participants who met all criteria. Each participant had a minimum of 1 year of teaching experience to a maximum of 6 years of teaching experience by the year 2020. The majority of participants worked in the state of California, with the states of Arizona and Oregon also being represented. I used purposeful sampling because a specific population and their specific experiences were being explored. The recruitment process relied on social media platforms such as Facebook to produce available U.S. participants who met the study's criteria. To ensure confidentiality, participants' identities were anonymized using assigned designations such as JHT1 (Junior High Teacher 1), which you will see below.

Data Collection

After obtaining approval from Walden University's IRB (IRB # 01-30-24-0994589), the process of recruiting participants for this research commenced. I disseminated a promotional document on the social media platform Facebook to solicit participants for the research study. Individuals who demonstrated an interest were contacted via email containing an invitation letter that stated the inclusion and exclusion criteria. Thirteen interested teachers willingly expressed their desire and agreement to volunteer for the research by responding with "I Consent" as a form of signature indicating their acknowledgment and acceptance of the consent letter. All participants who consented received an invitation to a Calendly scheduling calendar for an interview at a time that would work with their schedules. After learning during the interview that some participants did not meet the inclusion criteria, the method of scheduling was refined. In order to schedule the interview, participants were asked to verify their inclusion status by stating which school grade they taught in 2020 and in which state they worked in 2020 to maximize the potential for meeting inclusion criteria.

A total of 13 individuals were interviewed for this study; though, some individuals were later excluded from the study due to not satisfying the stated inclusion criteria, specifically not teaching a middle school grade, or not having worked as a middle school/junior high teacher in a western United State in 2020. Other participants' data were not used due to poor sound quality on the interview recording.

I initially believed that interviews might take as long as 120 min. When, in reality, interviews lasted from 20 min to 60 minutes. The online platform Zoom was used, which

facilitated and recorded the online interviews and generated a summary of the interview and a transcript of the interview. I was in a private office either at work or at home, and participants confirmed that they were also in a private location during the interview. The participants were duly apprised that the interview would be recorded for audio-only to minimize potential risk, as stated by the Walden IRB. Therefore, no video recordings were saved. All participants were interviewed about their self-directed learning experiences in 2020. Interviews followed a semi structured format as the data collection technique for this research. Every interview was done at the most convenient time for the people being interviewed. To accommodate the participants at their most convenient times, session hours were made available throughout the week and on the weekends, during the day and evening. All interviews were successfully conducted within the predetermined timeframe, concluding on February 15, 2024.

The use of prewritten questions (Appendix A) facilitated the concentration on the question and the responses provided by the participants while minimizing the influence of personal sentiments toward the research topic. The participants were not provided with the questions in advance of the interviews, which fostered an environment conducive to spontaneous communication. This approach allowed them to freely share their experiences and understanding without the influence of rehearsed responses or premeditated planning. The data collection procedures adhered to the outlined processes detailed in Chapter 3. The only modification that was made was that, while participants were invited but not required to refer to personal journal entries as part of the exploration of self-directed learning, no participant used information from personal records in the

interviews. There were no instances of unforeseen circumstances, distractions, or interruptions that arose during the process of data collection or while conducting the interviews.

Participants were later contacted via email to schedule a debrief known as member checking after the coding was completed. Participants were provided with a brief selection of two pages worth of original data from their interview and the subsequent coding of data points to confirm the accuracy of the data gathered. Some participants agreed via email that the data analysis was acceptable. It is assumed that the data interpretation was acceptable for all participants.

All data acquired during this study were securely stored in a fire-resistant and water-resistant cabinet within my designated home office filing system for 5 years after the study's conclusion. The dataset comprises electronic files containing transcripts of interviews, audio recordings of the interviews, and accompanying interview notes. The entirety of the data is stored on an external drive protected by a password and securely stored within a cabinet. Next, the data analysis and interpretation process will be discussed.

Data Analysis

The objective of the analysis was to explore and describe the experiences of self-directed learning during 2020 as described by junior high educators by using descriptive phenomenology. Giorgi (2009) explains that the process of analysis is based on the process of reduction, beginning with identifying meaning units that describe the experience being studied, called bracketing. To initiate the data analysis process, I

thoroughly examined the transcripts repeatedly reviewing them to develop a comprehensive understanding of the data. Throughout the iterative process of reading and analyzing the data, I discerned specific statements that exhibited relevance in addressing the research question, selecting, and bracketing data points for further analysis. Using Giorgi's descriptive phenomenological method, I extracted noteworthy statements, and subsequently formulated their meanings and aggregated these formulated meanings into clusters of identifiable parts stated in the 3rd person for a second reduction of the data where meaning was preserved and now viewed from a psychological perspective.

Next, each meaning unit and formulation of meaning was allocated to essential components of self-directed learning based on the research reviewed in Chapter 2, which allowed for a comprehensive composition that described the phenomenon of study, a third reduction of the data. Finally, the meaning unit codes based on previous research were organized and divided into meaning units that coincided or not with Knowles' six assumptions of adult learning, which was the final level of analysis. As you will see below, meaning units about self-directed learning were attributed to specific assumptions, and discrepant examples were labeled as barriers to the self-directed learning process within the assumption. Additionally, the data revealed that adult learners were able to acknowledge their level of learning before they began the learning process.

As I broke down the data to understand how junior high teachers learn in accordance with Knowles' assumptions, I identified that participants expressed a "pre-learning" state before they began the process of learning online teaching. This state was coded as an acknowledgment of a "lack of experience" or "lack of practice" with online

teaching and occurred before teachers engaged in the learning process. As this is a baseline state for junior high teachers before they begin the learning and transition to the online learning process in 2020, I consider it to be a skill in the learning process if it is discussed positively or neutrally or a barrier to the learning process if this state is discussed negatively. The rest of the data are then broken down according to the six assumptions of adult learning with the following codes pulled from previous research or the explanations of the assumptions themselves:

Assumption 1: Adult learners need to know why they are learning something, and they often prefer to learn something that is relevant and useful. Codes that fell under this category were “what/why of learning,” and “persona/professional goal(s).” There were no barriers identified with this assumption.

Assumption 2: Adult learners are autonomous and have a desire to be seen as self-directing. Codes that fell under this category include “taking initiative,” “self-teaching,” “creativity,” “responsibility,” “autonomy,” and “expert support.” Barriers to achieving this assumption were also identified as “no choice/lack of autonomy,” and “inaccessibility to resources.”

Assumption 3: Adult learners can draw on their own past learning experiences or learn from their peers and/or their past experiences. Codes that fell under this category include “collaboration,” “self-evaluation,” and “co-learner/facilitator.” Potential barriers to adult learning with this assumption were coded as “lack of prior experience,” “dependent on others,” “other evaluation/feedback,” and “unable to bridge the knowledge gap.”

Assumption 4: Adult learners are ready to learn the material that will be applicable in helping them know how to manage a concern, problem, or change in life situation. Codes that were in alignment with this assumption were “time needs,” “career needs,” “practical application,” “new ideas/concepts,” and a barrier to this was “time constraints.”

Assumption 5: Learning is easier for adults if it solves a realistic problem. Codes that were in alignment with this assumption were: “event analysis,” “personal learning engagement,” “overcome barriers,” “adaption,” “foster a self-directed learning (SDL) environment,” and “new ways of doing/thinking.” No barriers were identified with this assumption.

Assumption 6: Adult learners are more internally motivated than externally motivated. Codes that were in alignment with this assumption included: “internal motivation,” “reflection,” “metacognition,” “create meaning,” “own purposes,” and “change in world view.” Potential barriers to this learning assumption were identified as: “negative self-concepts,” and “external rewards.”

Coding was conducted following Giorgi’s (2009) phenomenological method where raw data chunks were identified through bracketing, the meaning was kept intact while writing about the raw data in 3rd person, and themes were identified which coincided with what the literature has already identified in adult learners generally. Discrepancies were identified with the codes identified as barriers as this data was often the opposite of what research has identified as adult learning.

Evidence of Trustworthiness

In the context of qualitative research, Creswell (2007) emphasized the significance of validating the methodologies and tactics employed to address concerns related to trustworthiness. In the present study, I employed descriptive phenomenological inquiry, incorporating bracketing, member checking, and saturation techniques. These methodological approaches effectively addressed concerns about the findings' reliability, potential biases, and preconceived notions. By implementing these strategies, the integrity of the study was safeguarded, minimizing any potential compromise (see Creswell, 2013).

Credibility

One way to establish credibility is a member check. In order to establish credibility via member checks on the data, I emailed participants a brief summary of my understanding of the data in the interview to ensure my understanding of the data. Participants were provided several opportunities to confirm or clarify my interpretation of relevant information, but not change their original statements. No participants spoke with me about their interview data, though two participants responded via email to report that the data analysis was accurate for their data. It is assumed that the data analysis was found accurate by all the participants. Throughout the data collection and data analysis process, I also used reflexivity to manage my own biases.

Transferability

To establish transferability, I interviewed teachers from different schools and school districts within the western United States. I used a rich description of their lived

experiences with self-directed learning in 2020, and of the phenomenon that they experienced as self-directed learners, as well as, shared pertinent background information. The variations found within the participate data may indicate how self-directed learning was implemented or supported. The transferability is anticipated to be low for this study due to its focus on teachers from one area of the country and the low number of participants; however, further research can be done to expand the possibility of transferability.

Dependability

In order to establish dependability, I regularly consulted with my dissertation committee so that my interview questions could be duplicated in future studies, and consulted with them on interview protocol, and for confirmation that the questions were in alignment with phenomenological research and trustworthiness. Additionally, I used reflexive journaling to observe my own thoughts, feelings, impressions, thoughts, and assumptions which emerged throughout the research study. I continued to use reflexive journaling throughout the data analysis process.

Confirmability

I used reflexive writing as one strategy of confirmability to prevent my subjective biases from interfering with my objectivity as a researcher. As someone who has had minimal experience in the education field, and coming from an outside perspective, it is important to recognize how my experiences and assumptions shape the findings in this study. Reflexivity also allowed me to factor in my own experiences as an adult learner

and how they possibly impact the findings, conclusions, and interpretations of this study (Creswell, et al., 2018).

Results

The subsequent section presents the findings of the investigation. The results addressed the research inquiry: How do junior high school educators describe the lived experience of self-directed learning in the transition between face-to-face teaching and online teaching during school shutdowns during 2020? Participants were teachers who taught junior high (Grades 7, 8, or 9) in the year 2020. They all worked in schools in the western United States (California, Arizona, and Oregon), and each participant had less than 10 years of teaching experience in 2020. The diversity of how self-directed learning is experienced and talked about gives clarity to previous research conducted by Callan (2019) when they concluded that it was unclear whether teachers had adult learning skills or not. Below is a graph that briefly summaries which assumptions were discussed by the participants during the study.

Table 1*Result Highlights Related to Knowles' Assumptions*

	JHT1	JHT2	JHT3	JHT4	JHT5	JHT6
Pre-learning	*	*	*	*	*	*
Assumption 1	0	0	*	0	0	0
Assumption 2	*	*	*	*	*	*
Assumption 3	*	*	*	*	*	*
Assumption 4	*	*	0	0	0	0
Assumption 5	*	*	*	*	*	*
Assumption 6	*	*	*	*	*	*

Legend: * = participant discussed this aspect of SDL, 0 = participant did not discuss this aspect of SDL

Pre-learning

Before learning anything new, adult learners are sometimes aware of their current level of learning and understanding. It may come in the form of a preference or a personal identity. Circumstances may challenge this originally developed learning which makes the adult learner aware of the need to additional learning and/or a change in world view. All six participants recognized this state by realizing that they had a lack of experience or practice with online learning soon after learning about school shutdowns and the requirement to move to online teaching.

Lack of experience

Junior high teacher acknowledged that they did not use technology frequently in their online classes, and could often not believe that online teaching would be possible.

JHT1 stated, "It's difficult. It was...my first time hearing that schools are ... going to be remote. I could not grasp how it's going to work because I've never been in such a situation." They often wondered, "How is this going to be done? Are we going to take test? How are we going to give out assignments? Enough questions were popping up

in my head, and I just felt it wasn't going to work." JHT4 reported that at first, they were scared, too: "I thought it wasn't going to be possible because I had really never learned online or taught [online]."

JHT3 reported, "And I was also worried about myself, too, how I'll be able to adapt to it and be able to reach them [my students] to be able to teach them remotely."

JHT2 stated, "At first it was very difficult to adapt because I'm more traditional. I like having this interaction with my students."

JHT5 stated, "I won't say I really loved it, because I think a math lecture should be in person."

JHT6 stated,

At the beginning, when this pandemic started, and I heard about the online class, I wasn't good about it. I wasn't feeling too good about it, because as a teacher, I prefer a traditional way of learning. [The] traditional way of learning you're going to be able to monitor your students. You're going to be able to talk to your students and relate. You know that teacher, students, have a relationship.

Lack of practice

JHT1 stated that much of the confusion was around using technology in the classroom. They stated that they needed to learn the online technologies such as knowing where to turn on the camera and microphone. JHT1 stated, "It wasn't easy. It was challenging. I felt it wasn't going to be achievable. I felt it's not going to be done. I haven't seen that before in all my years."

Assumption 1: Adult Learners set Goals and Need to Know the “why” of Learning.

The first assumption of adult learning is that adults need to know why they need to learn something. Given the state of the world during the pandemic of 2020, perhaps teachers did not feel a need to express that their goal was to learn how to use technology to continue teaching their students even though that is what happened. Additionally, no teacher indicated that they were able to take control of the learning goals (Alshaikhi, 2020; Bishop, 2021). No junior high teacher participant discussed their personal or professional goals about their own learning explicitly in the interviews. However, one teacher discussed the importance of their ability to continue to meet their students’ educational needs.

What/why of Learning

Only one participant expressed a reason for their learning efforts in 2020. It is assumed that other participants did not discuss this aspect of self-directed learning because it was understood at the time of the interview that a pandemic had happened and therefore school shut downs had also occurred (Jaggars, 2021; Marcum-Dietrich et al., 2022). JHT3 stated that learning for themselves was important because of their primary concern for their students, and their own ability to transition to virtual learning: “At first, I was overwhelmed and anxious having to transit to virtual learning something that I haven’t been doing. Then I was actually worried about my students.”

Assumption 2: Adult Learners are Autonomous

Adult learners are proactive in their learning; they will engage in learning with minimal or no prompts from an instructor (Knowles et. al., 2015). That is the assumption

here about autonomy. This section includes the many ways that junior high teachers were able to use their autonomy to move forward toward using online teaching. This section includes headings such as “take initiative,” “self-teaching,” “creativity,” “responsibility,” and “autonomy.” Some aspects of autonomy previously identified in literature include “internal change of consciousness,” and “control of resources.” The concept of resources is very broad as it includes such assets as: resources found outside of an institution, networking with peers, reflection, and using technology to enhance a skillset (Alshaikhi, 2020), and various resource sources just identified are spread out among the learning assumptions. Additionally, the junior high teachers identified barriers to autonomy in 2020 such as lacking access to resources or feeling like they did not actually have personal or professional autonomy.

Take initiative

It is assumed that adult learners see what needs to be learned or practiced, and then find and apply a solution (Knowles, 2015). JHT6 stated,

The first thing I did was planning and design. What I mean by planning [and] design was starting to define the learning objectives and identifying the target audience at the time, the content I wanted to deliver, and the teaching market I employed.

JHT2 reported, “For starters, I studied appropriate digital resources. Incorporated interactive engagement [for] my students visually.”

JHT1 identified that they needed help and took an appropriate first step: “I talk[ed] to my friends and my spouse, and basically everyone to support.”

Self-teaching

Adult learners are expected to take control of available resources and teach themselves the material more in depth (Alshaikhi, 2020; Bishop, 2021). JHT2 stated that to prepare for online teaching, they “studied more technology and curricula, like technology-based things that were actually going online with the school curricula.”

JHT4 stated that they “prepare[d] hours before the virtual interview, because I don’t want to [have] any technical difficulties. I wanted a smooth transition to my virtual classroom.” They further stated:

I studied presentation skills, especially as it concerned virtual presentation. And I also wanted to know how to do the things the right way or not, just as usual. I read a lot of books about presentation skills and any other [details]. I was trying my possible best to use two topics in a class and using examples watching videos and reading a lot.

Creativity

Creativity is one of the skills necessary for cognitive development (Morris, 2020), and is a contributing factor to helping adult learners explore, identify, and visualize learning material so that it becomes personally understandable (Alshaikhi, 2020; Sawyer et al., 2022; Sperling et al., 2016). Thinking outside the stated curriculum, enhancing current curriculum, and coming up with unique ideas were all ways that creativity was manifest for the following junior high teachers in 2020. JHT3 stated that transitioning to online teaching “allowed for more creative and engaging lessons. It was amazing.” JHT3 additionally stated that creativity was a key to their success. They stated, “Virtually I just

had to do things outside the books that would make them [my students] feel excited to want to have the next class [and] want to attend the next class. Everything worked more smoothly.”

JHT4 reported that transitioning to online teaching

...made me creative. That was one of the very beautiful things about it. It made me creative. It made me come up with unique ideas that would make my class interested and make me stand out from what the other teachers did.

Responsibility

Adult learners are responsible for the development of other learners (Mezirow, 1997) and continue to develop their own learning in their professions (Alshaikhi, 2020). JHT1 stated that focus was a necessary factor in learning and the learning environment, “regardless of their physical environment.” JHT1 knew their work was important and moved forward despite personal doubts. They stated, “Regardless of how I felt. I still just put in the work.”

JHT2 stated, “I overcame it. I put in some efforts.” They further stated, “We did the needful. We put in the work.”

JHT4 stated that trust and safety were important to establish at that time. They stated, “I helped to build trust between I and my student So, I created a safe learning environment for all of my students.”

Autonomy

Autonomy is developed in the face of challenges (Mezirow, 1997) and is a form of responsibility. It is assumed that adult learners are aware that they are responsible for

their own decisions (Malik, 2016), and the following junior high teachers were able to do that in a variety of ways. JHT2 stated that part of their autonomy was to “prioritize realistic expectations.”

JHT3 stated that to be autonomous they had to study the thing that was difficult for them. “I studied math most because it was like having to teach that virtually was a bit difficult for me.”

JHT4 reported that while it was an extra financial burden for them, fixing their computer for better online teaching quality was important. They had to option to improve their technology and chose to do so.

Part of autonomy includes taking control of available resources. JHT6 stated, I move[ed] into content creation. I develop[ed] some high-quality education materials which involved me creating a video lecture, writing out courses, materials, designing interactive activities, and developing assessment[s]. I choose a suitable platform that I host the class. I choose several subjects that [were] easy for the pupils to get.

Expert support

While it may seem counter-intuitive, research has shown that having support from others supports learner autonomy (Bishop-Monroe, 2020; Jhang, 2020). For these junior high teachers, expert support came from administration, family, and peers JHT1 had all three supports: “Other teachers that were more conversant with the technology. I even had my spouse assist me in navigating. Administrators and other staffs helped us well, in short, it was all hands-on deck to make sure I was on board.”

JHT2 reported that some materials were provided for them from their administrators, “I actually had some help from the school administration to provide alternative solution. Such as electronic device and printed materials.” They further stated that “I was involved in some online classes for teachers that actually prepared us for such scenarios [online teaching].”

JHT5 reported that the only way they knew how to transition to online learning was the training provided by the school. They stated,

My school provided us with trainings and workshop, so that we’ll be able to use our online, our classroom, like our teaching, our teachings via zoom and other workspace. They provided us trainings and workshops to us. So that we will be able to train our students like the training was based on how to use the zoom and the Google workspace. They taught us how to use Zoom, and how we’ll be teaching the students. They told us, what we will be doing so as to have audience from our students.

JHT2 also stated that they relied on a more expert peer, “I actually involved the help of my colleagues who had actually been through such phases before, [and] is an expert in such scenarios. He actually pulled me through.”

Sometimes, the experts were outside of the educational environment. JHT1 reported that in order to be successful, they could not be the only expert when teaching from home. They stated, “My kids always all over the place. It was difficult for me to know, control them. But then I had my wife assist me to minimize the distractions they

created for me and that, basically, enhanced the learning or the communication and interaction between the students and I.”

Barrier: lack of autonomy aka no choice

Unfortunately, perhaps due to the global circumstances which were outside of their control, some teachers expressed that they were not able to move forward with their learning and classroom development how they would have preferred. Many teachers felt they had no choice in many decisions to continue their careers. JHT1 stated, “I had no choice than to put myself out there and be assisted.”

Sometimes the situation itself felt out of their control. JHT1 stated, “But it happened.” JHT2 stated, “I just have to adapt. I just have to move on.”

JHT2 further reported,

I realize this was the only alternative. If we’re actually going to keep the business for education going. Since it was the required for us to actually continue with educational programs. There was no much option left. I just had to go with it. I actually had to make... a few changes in order to successfully make the transition and so far, so good. We got used to it. And that is still true.

They additionally stated, “We had no options; we just had to adapt. We had to reposition ourselves.” JHT3 reported, “It was more like I had no choice than to just accept it that way and then adapt to it.”

Barrier: inaccessibility to resources

Inaccessibility to resources was a concern that junior high teachers had for themselves and for their students. It is considered one of the violations to the principles of adult learning (Knowles, et. al., 2015).

JHT2 stated, “I had technical difficulties: Internet issues and problems with the live platform.” JHT4 reported that they also had technical difficulties, stating “It was a bit difficult, because at that time ... my laptop was already having difficulties, and I didn’t really have so much money at hand to fix it.”

JHT6 stated, “Firstly, my concern was about the student’s welfare. How some of them ha[d] not been able to be accessible to technologies. So that was my major challenge.”

JHT3 reported,

When I began the school year [2021/2022], it was actually, very, very challenging for me and some students had issues having access to the same level of technology. And it’s actually made it difficult for me to ensure that everyone was able to participate fully from the start because we were all new to the whole thing.

JHT6 stated, “During the online classes sometimes we encounter some bad connection.” JHT5 stated, “There is this time that one of my students got disconnected due to Network glitch.”

Assumption 3: Adult Learners use Past Knowledge or Knowledge from Peers

It is assumed that adult learners come into a situation with their own expectations and past learning (Mezirow, 1997), and use their own prior knowledge toward new

situations, often known as transference, and able to learn from the experiences of others. They do this in a variety of ways including but not limited to collaborating with peers, being a co-learner or co-facilitator in learning. However, many barriers were identified in this assumption as these junior high teachers identified a lack of experience (see pre-learning above) so they were required to rely on experts for training, were unable to perform tasks on their own successfully, or relied on other's feedback more than their ability for self-evaluation. The ability to bridge the learning gap was not discussed explicitly with these participants, perhaps because they did not acknowledge having prior experience with online teaching methods.

Collaboration

Collaboration comes in many forms: informal conversations, social networking, peer feedback and coaching, team teaching, support groups, case studies, formal training, and continuing education opportunities supported by the institution (Alshaikhi, 2020). JHT1 reported, "I had to ask for help. I asked my friends, asked, basically anyone, that could put me through the technology, and I was assisted."

Collaboration was also a way for teachers to build community and overcome barriers that arose as they transitioned to online learning. JHT1 reported,

It got better.... Eventually, everyone got better and improvements came in.

Everybody became more conversant with it. As the pandemic went on, everybody needed someone to talk to, so, everybody decided to open up and share more, and, along the line, it improved tremendously.

JHT2 stated, “After some time apart, I was able to reconnect with my peers and have a face to face. even though it was online with my kids [students].” JHT3 stated

I actually went through some trainings for the transition in process trainees on how to use the Google Workspace, like I said, and then Zoom and other resources. I also relied on other colleagues of mine that were good with this technology to the whatever challenges I seem to face, I get to share it with them.

JHT2 reported that they collaborated with parents, “I involve[d] the help of the parents. It wasn’t a singular attempt to get my students the resources, everything virtual.”

JHT6 reported that having parent collaboration and support was a vital part of student success. They stated, “The parents were there to be able to guide their children.... It was really good that the parents were there. They were supporting me.” Further they highlighted how helpful it was to have parents supporting their children’s education: “During online classes, the students were so coordinated and the parents were there, and it was cool.” JHT1 concluded, “It wasn’t easy, but with the help of people who care, and people want to see you succeed, they helped.”

Self-evaluation

Self-evaluation is the adult learner’s ability to look at a situation and determine their own progress (Alshaikhi, 2020; Bishop, 2021). Part of self-evaluation can be done through reflection (discussed in more detail below) and can help a learner develop learning competencies (Gradišek & Polak, 2021). Half of the participants recognized that they either had trouble with self-evaluation, or were able to evaluate that they could not make the transition to online teaching on their own. Some were able to positively

evaluate their own level of determination to succeed. However, since no participant discussed or identified their learning goals, there was no self-evaluation about their personal progress toward developing a learning competency.

JHT1 stated, “Without that [support from my more expert peer] the first lesson probably won’t uphold with all the preparations I had, and with all those small practices I had upon starting, I was just quite nervous, and I couldn’t get it all together.”

JHT2 and JHT5 stated that they were able to recognize that self-evaluation was a challenge for themselves and their students. JHT5 reported that learning how to do teaching online was “really, really hard for me.”

JHT4 evaluated that they had the skills they needed to succeed in the transition to online learning during the pandemic. They stated that by creating a safe environment for their students, they were being the best teacher they could be for them. They also determined and put in the hard work necessary to support their students because it would be required of them to help their students succeed.

Co-learner/facilitator

Taking on the role of a co-learner or co-facilitator instead of an expert is its own change in world-view as teachers collaborate more with family, peers, and parents, and take a step out of the expert role (Mezirow, 1997). JHT3 stated, “I find that having to share my challenge with my colleague and then reworking together in it, I was able to learn a lot from them.” JHT2 stated that co-facilitating also included their students’ parents, “I asked for help and actually came through for me, most of them.”

JHT1 stated that their peers included their family, and identified everyone who helped them as part of their support system, “Friends, my wife, everyone, all hands-on deck, and we got it done. So basically, having a support system is one of the most important things and transitioning in any stage of life.”

Barrier: Lack of Prior Experience

Participants reported that there was not a lot of experience with the use of technology and online teaching even as it was time to use new knowledge in a live setting. JHT1 stated,

It was difficult navigating the technologies involved. It was difficult preparing for class, and I wasn't understanding much of it for quite a while. I didn't have any experience on how it was going to be done, especially being the one to host the meeting. So, for the first few classes I tried to host, it wasn't working. The class started late.

Barrier: dependent on others

JHT1 acknowledged that as much as they didn't like it at times, “I had support.” But they were dependent, at first, on others to help them navigate the technology effectively. They stated,

I had to reach out to someone and they had to host for me. I had to join. And then, after I did the meeting for me, I joined and I basically took on the class from there. He basically helped me navigate from his own end. I don't know how he did it. I joined to send me the link, and I shared to all the students we all joined,

and then that was how I was able to escape the first predicament of my first lesson.

Barrier: other evaluation/feedback

Part of adult learning is to evaluate your own progress, or get feedback from peers or other authorities on learning development (Alshaikhi, 2020; Alvi & Gillies, 2020; Bishop, 2021). However, it was difficult to get students to engage fully in the online classroom, and some junior high teachers focused more on classroom management. JHT1 stated,

I tried to get feedback from the students, you know, ask questions, and try to get response out of them because oftentimes these people just want to turn off the camera, and sit behind, or probably go do something else.

Barrier: Unable to Bridge Knowledge Gap

This code was unique in that, for teachers, they had to bridge their own knowledge gaps, and help their students overcome their knowledge gaps. Even the adult learner must be supported during a transformational learning process (Arghode et al., 2017). The beginning knowledge gap appears to have been a challenge for all learners. JHT6 stated, “At first, I wasn’t able to get the students attention so it was really a kind of a difficult thing for me.”

JHT5 expressed negative emotions about their first experience:

When I began, I wasn’t flowing well, because I wasn’t used to teaching online visual learning. I could not teach well; I felt my students were not listening. I felt they were not paying attention. Mathematics is a very hard subject. I was down.

Assumption 4: Ready to Learn and Apply Relevant Material

Adult learners are assumed to be open to learning and be able to apply relevant material quickly in order to overcome barriers (Malik, 2016). However, research has shown that some conditions need to be in place for this assumption to be true. Some of these conditions include needs around time, career, practical application, and the acceptance and practice with new knowledge (Franco, 2019). One participant discussed how time was necessary to meet their learning needs, but some indicated that there was often not sufficient time in their learning to apply the new knowledge of online teaching well.

Time Needs

All new learning takes time to assimilate. JHT1 reported that it took them 1/3 to 1/2 of the time between shutdowns and starting their virtual classroom to become comfortable with online teaching. They stated,

I think it took me between 2, 3 months, and then eventually it basically got better. I feel at about 3 months, and I could easily, or more conveniently, navigate through the system without much interference or issues. I was getting a proper hang of it, but the tough stuff was new. I wasn't feeling the whole vibe: remote switching on camera, responding to questions. It was all just confusing at once, and then but it got better, and within 2 to 3 months I was there.

More about time needs will be discussed in the section on adaptability.

Career Needs

Each junior high teacher had a different idea of what was the most necessary to continue with their career needs in 2020. JHT2 stated, “I [found] the transition challenging, ...but [I] got used to certain operating, got used to the flexibility of virtual learning and adjusted to a structured schedule that actually benefits both I and the kids.”

JHT6 stated, “I considered the course, and I consider[ed] the outline, and I also consider[ed] the outline of the course, the particular state of pupils, all students that I will be handling.”

JHT6 stated, “I consider the technology and the platform that I will use during that period. My field of study was on home economics.” JHT6 continued,

I started with regulatory learning and my thoughts where I have to create my own materials, that would be easy for the student to be able to adapt to a particular teaching because that was the first time of attending online classes. One of my criteria was monitoring the progress of a student. As a teacher, you want your student to be able to produce results.

Practical application

Malik (2016) and Knowles et al. (2015) both highlighted how adult learners prefer applied knowledge. JHT1 stated that after they understood what they needed for online teaching, “I was also able to help the kids as much as they needed as well.” That was important because concern about student learning was a teacher priority in 2020.

JHT1 stated,

I wanted to make sure that interactions were there, the interactions where enough students are communicating. I was asking questions and they were giving feedback. So, I tried to call each student by name, to speak up for a means of interaction, and to reduce the awkwardness in the whole situation. So that was my focal point for the first few classes, or even now, whenever there's an online class, or I'm hosting a class.

New ideas/concepts

Mezirow (1997) stated that new ideas, people, or experiences lead to transformative change because old learning is altered in the face of new information. Transformative learning occurs when knowledge is directly applied (Slack, 2019). These junior high teachers got to experience that. JHT2 stated, "Transitioning from that to an online class was new for me." JHT6 stated, "At first, I felt off about it. But when I started the online classes, I came to realize that there was no difference between the traditional way of learning and the online classes." JHT1 reported, "The 2020 experience, the whole pandemic, open[ed] my eyes so much to what we can achieve with technology."

Barrier: time constraints

This barrier is considered one of the violations to adult learning principles (Knowles et al., 2015). Learning takes time, and teachers, like any adult learner, needed time as a resource to help them understand the situation and then move forward (Segal & Heath, 2020; Siefert et al., 2019b; Slack, 2019). JHT1 stated, "It really took time to find my bearing." JHT5 stated, "I didn't have enough space to talk to my students, I felt they were easily distracted."

Assumption 5: Adult Learners Find It Easier to Apply and Solve Realistic Problems

Adult learners have an easier time applying new knowledge to solve realistic problems than non-adult learners, that new knowledge meets a need the learner has (Abdul Aziz et al., 2014; Knowles et al., 2015). That assumption means that adult learners can analyze events accurately, have personal learning engaged, adapt to problems, and overcome barriers, create new ways of doing something or thinking about something, and take that knowledge further to foster a Self-directed Learning (SDL) environment. No barriers were identified from previous research or from the interviews for this assumption, and participants had the most to express about this aspect of adult learning.

Event Analysis

When junior high teachers first learned about the closure of traditional school formats and the goal to shift to online learning, their initial analysis was not positive or optimistic either for themselves or their students. But analysis is an ongoing process which these participants experienced (Alshaikhi, 2020; Bishop, 2021).

At first, the analysis of the problem was based on old learning patterns. JHT1 stated, “I couldn’t interact with my students one-on-one and get the physical responses from their body languages, and how they respond to questions. It was just quite challenging.”

JHT2 stated that the experience of the shutdowns during the pandemic was “informative” and “educating.” They also stated that it was difficult.

I, at first, actually [found] it very difficult to connect with students to a screen. and I felt it [was] very, very difficult to actually engage the understanding of the materials, and to actually know if they were actually fully keeping up with the right materials and the right procedures.

JHT3 stated, “It was a very, very challenging moment. My first day of teaching the classroom, remotely, was actually chaotic. I had a chaotic experience with having technical difficulties, student dropping in and out of the virtual classroom, so it was more stressful on my part.”

JHT4 stated,

When I first heard it [schools would be shut down], I really felt bad [fearful, they later clarified] because I realized that transition from an in-person class to a virtual class means me losing connection with students I have built for a personal relationship with over time.

JHT4 stated that online teaching was “very practical.”

JHT5 stated, “I felt my students were easily distracted because they would, they would not listen to me. They were not really paying attention.”

Eventually, that negative initial analysis was able to change as everyone adjusted to the changes. JHT6 stated, “They really liked the way they respond[ed] to teaching. The outcome of the lessons was really encouraging.”

Personal Learning Engagement

Personal learning engagement is about the learner practicing what they have learned before applying it in a live setting. JHT3 stated,

First, I had to familiarize myself with some of the resources that I'll be using to teach more like the Zoom, Google classrooms and all of that in order to be for me to be able to utilize them effectively in teaching.

JHT5 reported that beyond the expert training, they practiced what they learned. They stated, "I did more on my own, because [in] trainings [alone] you won't really understand. But the more I joined the Zoom, and the Google workspace, I learned things; I learned more on how to use the apps."

Overcome Barriers

Some barriers to applying knowledge included not having enough knowledge or support, and managing their emotions.

JHT1 stated, "I got all the help I needed, and it was great." JHT4 stated, "I was able to manage [my fear] even if it was really difficult."

Adaption

Adaptability is an important factor in learning development and was reportedly used by most of the participants. Adult learners are known for their ability to adapt to changes quickly, apply critical thinking and be flexible with rapid changes in a workplace (Mezirow, 1997), a skill that was certainly put to the test in 2020 and which junior high teachers were able to use effectively. JHT1 stated, "I was assisted. And then eventually over time things got better."

JHT2 stated that despite hardships due to the pandemic that they adapted to the changes required due to the pandemic. They stated, "I had to adapt and go with the flow, and look for ways to actually involve my kids [students], and actually develop myself."

JHT3 stated, “Change is always constant, so something can come up. But your ability to be able to adapt to these situations counts.” JHT3 further reported, “We’re just trying to adjust to make sure that okay and things are done in in a proper way, effectively. It got easier with time. We got used to it with time.”

JHT5 highlighted that newly gained knowledge can help with adapting to a new situation. They reported that they adapted to online teaching by applying what they learned from the expert training they received through their school and administration. They stated at the end that “it was easy over time.”

JHT1 reported that adapting to the changes was just as important for the students, “this is just like a classroom, and, at some point, students were excited to come and relate with each other.” JHT4 stated they had to adapt themselves to meet students’ needs. They stated, “Because I wanted excellent delivery to my students from me, I had to fix it [my computer].”

Foster SDL Environment

Whether in person or online, Mezirow (1997) stated that it is an educator’s responsibility to help their learners develop the following skills: autonomy, social responsibility, support in problem solving, reflection, diversity, collaboration, and participation. The junior high teachers interviewed had to use these skills themselves to model them for their online students. Additionally, they have responsibility to help their students reflect and adapt teaching practices to meet individual students’ learning needs (Toker, 2020). JHT2 stated that working with peers such as special education

professionals, and their own efforts to find materials, ideas, and other basic information were vital for creating a good learning environment.

JHT1 stated that it was important that students understood the classroom boundaries hadn't changed drastically due to the pandemic for themselves and for their students,

It's still a classroom because the students [and] the teacher make up a classroom.

So, one of the things I did was emphasize the importance of the classes, regardless of the format, in which it was being done. I always impressed on my student that this should be treated like a physical classroom. and everyone should do their best to participate, remove all distractions, and communicate to their family members that 'okay, I will be having classes between this r to this R. So please, I would need some amount of privacy.'

JHT1 further stated that it was important to them to recreate the classroom experience as much as possible. They stated, "We tried to maintain the same level of seriousness [we] would give in the classroom[it's] what we try to replicate even remotely."

JHT2 continued to involve parents in the learning process to create a self-directed learning environment. They stated

I involve[d] the help of the parents [through] regular communication with the parents, and resources for supporting their child learning and addressing concern[s]. I love the parents. They were there to help supervise the kids. I'm not going be there to do the work. I actually needed their help.

JHT3 stated, “I was actually able to connect with some of my students, and I was. I was impressed by their resilience and adapting to these changes.”

JHT4 stated, “I made sure to have a personal connection with my students [by] asking them about their wellbeing and that of their parents.”

JHT5 reported that they tried to make sure their students were engaged in the class. They stated,

I made sure the lectures..., and I created opportunities for interactions so that my students wouldn't be bored easily. I asked them questions to make sure, they were paying attention because I was teaching math. I made it fun for them. They had lots of interactions.

JHT6 stated,

You need to look for a topic that they will be able to receive. I tried to organize some materials that will help them to be able to adapt to the teaching environment. As time goes on the students were able to catch up. They were so excited about the class like they were. So, they enjoy[ed] the online class. I really felt I really had a nice experience.

JHT2 reported, “I actually directed them [my students] to some resources they got actually like, feel comfortable to like make them easier to like get the reading information they actually need.”

JHT5 stated, “When I started making the classes interactive fun for the students, they want to be online every time like will not really talk about just the mathematics will ease or ask them patience about what happened in the house.”

New Ways of Doing/thinking

New ways of teaching occurred because these junior high teachers were able to apply the new learning they had about online teaching which challenged their own personal and social assumptions (Mezirow, 1998, 1997). JHT1 stated,

I just let everything flow naturally, and it worked out for me. I didn't have to beat myself up, even though I was concerned about a lot of things. But I tried to let everything flow and the things that were within my control. I tried my best to control them, and the things that were out of my control, I either passed it on to someone who could handle it for me, or just let it be.

JHT1 stated, "I basically asked for help—actually up and talking to fellow colleagues, sharing experiences and different opinions and views" instead of doing things on their own.

JHT2 stated,

...transforming traditional lesson plans into format suitable for online learning actually poses some challenges. Despite these challenges, I actually found some positive in the online session, so I was, if to reach an audience and connect with my students. It was a mixed experience.

JHT4 stated that constancy is what made a positive difference to them in transitioning to online learning.

Assumption 6: More Internal Motivation than External Motivation

Adult learners are often seen as though they do not need external motivations when the learning assumption is that adult learners are able to access internal resources

and move forward from internal motivation more effectively than younger learners who are often seen as being more motivated by external sources (Malik, 2016). Additionally, adult learners are expected to rely less on others over time (Mezirow, 1997). Participants expressed their personal growth needs, internal motivations, reflections, metacognition own purposes, their ability to create meaning from their own beliefs, judgements, and feelings for them to develop their own purposes and not rely as much on others (Mezirow, 1997), and changes in their worldviews about education because of this learning experience. External motivation, and negative self-concepts were identified as barriers to adult learning motivation.

Internal Motivation

Connection with others and personal values were identified motivators for some junior high teachers. JHT3 stated, “Along the line, I got used to it [online teaching], and then it was actually rewarding. I found out that I was able to connect with my students in a new way, entirely builds a virtual environment.” JHT3 further stated,

I actually made sure to maintain regular communication with my students through emails, phone calls [or] video calls in order for me to create that sense of connection and community to create that safe space for them and for myself as well.

JHT4 stated, “I started preparing for that [online instruction], because one of the reasons that made me even prepare even more, because [...] the development of minds was in my hand. I had to take it more seriously.”

Reflection

Reflection is one of the key facets of Mezirow's transformational learning theory (Merriam, 2004). Reflection can be a form of self-monitoring (Alshaikhi, 2020; Bishop, 2021) which helped these junior high teachers change how they approached online teaching or gain a new appreciation for learning possibilities. Reflection can also help a learner determine the next step to take to solve a problem (Callan & Cleary, 2018) and/or process a disastrous event (Bishop, 2021). Getting started was a challenging time, JHT1 stated, "On the first day, I was pretty nervous; and then I was just confused." Additionally, at the beginning of the pandemic, so much was changing so quickly that JHT1 stated, "I was destabilized. The pandemic was a sad one, because human interaction became minimal."

Sometimes, the situation was frustrating, and JHT1 stated, "I was getting angry of the whole situation." JHT2 stated, "It wasn't easy transitioning."

JHT1 stated, "I was really glad that, regardless of how I felt, [I] actually, just put in the work."

JHT2 stated that their experience during the pandemic was "informative, ...challenging, [and] it was a big change for me."

Over time, the restrictions of the pandemic were lighter and teachers observed, "As the pandemic went on, as it all faded away, as Lockdown started to ease up. I feel like it was just more natural" (JHT1).

JHT5 reflected that at the beginning of the pandemic, “I wasn’t happy. I felt sad, and I was frustrated.” They also reflected that they were concerned that their students would struggle to pay attention in an online learning environment.

JHT5 stated, “It was hard for me. I’m not sure I really enjoyed doing that. It was very challenging [and not] really cool for me.” By getting student engagement, JHT5 stated, “I started enjoying it.” They decided that “You have to put more fun to teaching.”

JHT6 stated, “At first, I wasn’t comfortable about it. I was a kind of discouraged about the whole thing.” JHT6 stated that overall, “It was really an amazing thing. It was a really good, nice experience.”

Metacognition

Metacognition is the adult learner’s ability to assess the learning tasks, evaluate their own level of knowledge or skill, plan their approach to learning new material, monitor their own progress, and adjust their learning strategy as needed (Woldkowski & Ginsberg, 2017). JHT1 stated, “I didn’t want to push myself too hard because I was already feeling down. So basically, I just let everything flow naturally without being too hard on myself because it was quite difficult here for everyone.”

JHT3 stated that they really wanted to return to face-to-face teaching. They stated, “It was a lot easier when it was physical than having to do that virtually.”

JHT4 reported that the experience of the pandemic made them think a lot about how to continue engaging students. JHT6 added,

From [a] learning aspect, online ought to be better, because in the online form of learning, they, the students, will be kind of afraid of their parents or their guidance when they are out from their traditional way of learning.

Create meaning

An important motivating factor for learning is creating your own meaning behind the learning. Meaning includes one's beliefs, judgements, and feelings (Mezirow, 1997). JHT1 stated, "I didn't give up. I just kept on trying my best, and over time, improvements came." By the end of the school shutdown period, JHT1 stated, "It just an amazing experience for me, regardless of the other parts. And then I just I just thought a lot could be achieved."

JHT4 stated that "realizing that I would have to be teaching people's children, and for them only to be teaching people. It means they trust me enough to let their children [take] my class."

Own Purposes

Having one's own purposes is developed from the meaning one creates (Mezirow, 1997). JHT4 stated they prepared a lot so that they were prepared to explain the material to their students.

Change World View

A change in world view is the learning result when a learner has developed greater autonomy in the process of cognitive change (Mezirow, 1997). JHT1 reported,

Regardless of my opinions, I still put in the work. Then it was difficult, but, as time went on, it improved. It got better, and my opinions were changed. I basically changed my own opinion by putting in the work necessary.

JHT1 also stated,

I realized one could achieve so much if they put their minds to it and the work towards it. It just changed my whole perspective of how I thought things should be done. I realized the need not to be rigid and to be more fluid, and you know, let things take their course and just be dedicated. It was a great learning experience for me.

JHT2 stated that they realized that human connection was important. They also realized that “technology has its place in education. It can replace the relationship and personal connection that perform in the classroom. I believe technology did a lot during the pandemic.”

JHT6 stated, “If I have the opportunity that there will be no traditional way of learning.”

JHT1 further stated,

If you do not have a support system and you’re trying to transition, it’s way more difficult. And if care is not taken it might just end up giving up. But when you have a support system you can always have it. You can always get it to work.

Barrier: Negative Self-concepts

This barrier was considered by Knowles, et. al. (2015) to be one of the violations to the principles of adult learning. JHT1 was able to recognize that their initial view of

themselves and their competence was a barrier to develop the skills necessary to become proficient at online teaching (Segal & Heath, 2020; Siefert et al., 2019; Slack, 2019) and that the situation had to change even though it was difficult: “I was kind of scared having to ask other people because ... it’s not easy to ask for help. I had to put aside my pride or my ego. I just had to ask for help.”

Barrier: external reward. Making sure students were cared for was a common external motivation for educators (Bishop-Monroe, 2020). JHT3 reported that their students’ participation in the classroom helped make the class be more engaging.

Summary

In this chapter, I provided an overview of the research methodology and the qualitative data processes used to examine the research questions. The responses of the participants were recorded without prejudice or bias. In some cases, participants encountered difficulties understanding the question, consequentially questions were reinterpreted for them to elicit the most comprehensive response. I also provided the findings yielded using coded themes depicting the lived experiences of each of the study participants as communicated during the interview process. These themes, based on Knowles’ assumptions of adult learning, indicate that junior high teachers were able to access many aspects of self-directed learning during 2020. However, not all known aspects of self-directed learning were reported to be used in 2020. During the pandemic, it appears that junior high teachers’ learning primarily included seeking help from others, and being able to analyze and reflect on their experiences to find solutions to keeping their students engaged in learning. Additionally, some aspects of self-directed learning

such as setting goals was not discussed at all and therefore could not be included such as how a junior high teacher evaluated their own learning progress.

In Chapter 5, I will connect the findings of my study with the relevant literature. I will discuss the limitations and implications of the results of this study. At the end of this study, there will be suggestions for further research.

Chapter 5: Discussion, Conclusions, and Recommendations

Introduction

The purpose of this qualitative study was to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching due to the COVID-19 pandemic. To address the research questions in this qualitative study, descriptive phenomenology was chosen as the research design because it focuses on understanding the structure and essence of phenomena (Giorgi, 2012; Jackson et al., 2018) as lived and experienced by a person. Giorgi (2014) described it as, "dealing with presences, not existences, which is precisely what a phenomenon is: how an object or situation is experienced, precisely as it is experienced; how an object or state of affairs presents itself to an observing consciousness" (p. 546). It was important to explore junior high teachers' self-directed learning experiences during 2020 to understand more clearly how teachers experience learning in times of high stress. It was interesting to note the complexity of adult learning, and that some learning assumptions were discussed, and others were not mentioned at all. The most discussed aspects of self-directed learning focused on how the teacher was able to connect with their students, such as event analysis and fostering a self-directed learning environment.

In this chapter, the findings presented in chapter four will be interpreted, and further interpretation will be explored through the theoretical framework. The limitations of this study and recommendations for future research will be presented, and the implications of this study will be discussed. This chapter will end with a conclusion about this study and its findings.

Interpretation of Findings

With how junior high teachers described their experiences of self-directed learning in 2020, I believe we can agree that they do have self-directed learning skills sufficient to meet the challenges they face. However, the quantity and quality of skills may need further development. (For a visual representation of the findings, see Appendix B.) The literature has noted many factors that contribute to self-directed learning, and I will highlight a few of them here.

Scaffolding is an important part of any learning process. Any learner gains new knowledge through a step-by-step process of knowing new information, applying it, and evaluating the progress gained (Alvi & Gillies, 2020; Slack, 2019). Adult learning is not an independent or solo endeavor. Self-directed learning can be a joint venture between administration and educator. Collaboration with staff, and focus on experiences, having a professional and supportive learning environment (Bishop-Monroe, 2020), which was achieved first by the training provided to teachers about online learning as discussed by JHT1, JHT2, and JH5. Each participant discussed how their schools provided official training and workshops on online teaching and which online programs they were approved to use such as Zoom, and Google Workspace. Once the basic training was completed, it is up to the adult learner to potentially seek learning independently or from an institution (Currie-Knight, 2020; Franco, 2019). This independent learning took many forms. Some participants practiced what they learned (JHT3, JHT4) or expanded on what they learned (JHT2), while others sought out more support from peer experts (JHT1), and still others dove into their creativity to find teaching content and information online to

have classroom success (JHT6, JHT3, JHT4). Despite the abundance of support available, even when it came time to apply this knowledge, some, like JHT1, needed extra support and were dependent on their peers for individualized help in order to become proficient (Lysniak et al., 2019). Autonomy was a struggle in other ways for junior high teachers, too. Due to the global situation, some teachers felt they had no choice but to accept the situation and adapt to it (JHT2, JHT3), and others were able to ask for help even if they were not comfortable with it (JHT1).

Julius et al. (2022) stated that the role of supportive administration is to facilitate interactions with colleagues and the community. Junior high teachers mentioned that collaboration was easier when restrictions were lighter, and they could meet with their peers face-to-face instead of online (JHT1, JHT2). Additionally, caring relationships (Jagger, 2021) and collaboration (Alshaikhi, 2020) with colleagues, parents, and their own families were to be maintained even with the distance, but no participant mentioned that the administration helped with that process. JHT2 and JHT6 both spoke about how they specifically reached out to the parents of their students on their own for support for their students during 2020. JHT1, JHT2, and JHT3 all mentioned that they had to reach out for help from peers and family for learning and support.

Knowledge of self, transformational learning theories, assessment, and engagement are all components of self-directed learning (Jones et al., 2019). These components help foster a self-directed learning environment. This manifested for junior high teachers in the form of seeking support from more knowledgeable peers and getting

parent support (JHT2), setting classroom boundaries (JHT1), connecting with student strengths and wellbeing (JHT3, JHT4), and class engagement (JHT5, JHT6).

Writing field notes to review can help with the personal assessment aspect of transformational learning (Giles, 2018). No participant shared personal writings from 2020 to explore their transformational self-directed learning progress in 2020.

Additionally, as no junior high teacher discussed their personal or professional goals, it can also be suggested from the lack of discussion that assessment of their own personal and professional development was lacking in 2020.

In order for education to continue, junior high teachers had to take their jobs very seriously and have a strong sense of responsibility to their jobs and their students. JHT1 and JH2 stated that they put in the work necessary for success despite their own misgivings. JHT4 was motivated by their responsibility to create a safe environment for their students. To continue with this responsibility, junior high teachers had to “go with the flow” (JHT1, JHT2, JHT5) and often focused more on classroom engagement and management via the help of peers and parents than their own learning development. To address the concern of classroom management and absenteeism (Nadeem, 2021), JHT1 sought evaluation from their students to improve classroom quality and engagement. Others, like JHT6, struggled to get their own students engaged at first.

Teaching methods support (Safta-Zecheria et al., 2020) comes in the form of needs. JHT1 stated that it took them up to 3 months to really believe they could teach online well. Additionally, time constraints really impacted student participation (JHT5). Beyond time, junior high teachers had to increase their use of learning technologies and

be flexible with themselves and their students in the process (JHT2, JHT6). For junior high teachers, it was important to learn the technology of online learning so that they could engage their students in learning technologies (JHT1).

Junior high teachers were aware that ongoing learning development was up to them (Safta-Zecheria et al., 2020). They had to prioritize realistic expectations for their and their students' professional development. They had to make sure that they had the right types of technology: equipment (JHT4) and platforms (JHT6) and knowledge (JHT3) in order to succeed. Unfortunately, even with the right technology in place, technological quality had to catch up to the demand, as expressed by JHT2, JHT3, JHT5, and JHT6.

Adaption (Morris, 2020, Mezirow, 1997) is important for all learners. Adaption was supported by getting help from peers and setting up an engaging environment (JHT1). Going with flow was easier with time and helped reduce stress (JHT2, JHT5). Self-evaluation (Alshaikhi, 2020; Bishop, 2021), while an important step in self-directed learning, was not used too favorably by junior high teachers in 2020. JHT1, JHT2, and JHT5 all evaluated that they struggled to learn and apply the skills necessary for education success. JHT4 evaluated their ability to create a safe environment and not on learning materials. Self-evaluation can also impact your view of self. JHT1 reported that they had to let go of their idea of themselves and their pride to get the help they needed to be successful in teaching in an online environment.

Event analysis (Alshaikhi, 2020; Bishop, 2021) was a self-directed learning skill that was mentioned by each participant. At first, each participant expressed doubts or

concerns about the transition to online learning. However, as they continued to analyze the changing situation, they discovered that online learning was “practical” (JHT4), “informative and educating” (JHT2), and determined that the lesson outcomes even became “encouraging” (JHT6).

Reflection was primarily used to process the events of 2020 (Bishop, 2021) instead of being used as a way to evaluate goal progress (Callan & Cleary, 2018). JHT1 and JHT2 discussed how sad, frustrated, challenged, or destabilized they felt at the beginning of the pandemic. Some participants reflected that their feelings changed over time. JHT5 and JHT6 spoke about how they started enjoying the online teaching and how overall it was an amazing experience.

Theoretical Framework Interpretation

Mezirow (1997) stated that adult learners rely less on others and focus more on personal values. Part of that adult learning development is due to internal motivation. Junior high teachers find connection (JHT3), and educational development for themselves and their students (JHT4) to be very motivating. Some teachers found their motivation externally through their student’s engagement in the classroom (JHT3).

In the learning process, new ideas and concepts (Mezirow, 1997) are both introduced and developed. Junior high teachers were exposed to the idea of online teaching and came to realize that technology use in learning was effective, and achievable (JHT1, JHT2, JHT6). New knowledge can lead to new actions. Junior high teachers reconnected with the values of community by asking for help or letting things go, and learned the value to technology-supported education (JHT2, JHT4).

Once an adult learner has new knowledge, they get to create meaning through their beliefs, judgments, and feelings (Mezirow, 1997). For JHT1 and JHT4 that meaning came through discovering what was achievable through online teaching and the amazing trust that students and parents have in teachers. From creating meaning, an adult learner developed their own learning purposes (Mezirow, 1997) which for JHT4 was to continue to be prepared to teach.

Change in world view (Mezirow, 1997) is the concluding component of transformational learning theory. Many junior high teachers reported that their opinions about online learning were changed due to hard work, changing their perspective, and having a support system (JHT1). Some realized that their values were able to be met in person and online (JHT2), and some even believed that online teaching was better than in person teaching (JHT6).

Limitations of the Study

Due to the small sample size for this study, there are many limitations to explore. This study focused on junior high teachers which means it does not include data from other roles mentioned by participants such as administration, students, and parents. However, I had both junior high teacher and high school teachers reach out. High school teachers, those who teach grades 10, 11, or 12 were not included, but appeared to be eager to share their experiences. Additionally, I had junior high and high school teachers reach out from the mid-west and eastern parts of the United States who were not included. Another limitation through this study was that participants did not share

personal records about their time in 2020 and focused on and relied on their personal reflections of that time despite the number of years between the event and the study.

This study did not focus on autonomy, which is one of the hallmarks of adult learners, and some adult learners expressed a lack of autonomy. This study did not explore the reasons behind the feelings of a lack of autonomy nor the areas where teachers believed they had autonomy. Due to the descriptive phenomenological method, there are limitations in data interpretation. Other researcher may identify different aspects than I have since no technology was used to identify themes in the data. Additionally, this study may look different if interpretive phenomenology or other methods were used to explore the self-directed learning skills of junior high educators in 2020.

Recommendations

Future research about self-directed learning and the experience of school shut down in 2020 could include high school teachers, or teachers from the same or other areas of the United States. This would be interesting because much of the literature in chapter 2 included international studies about the experiences of high school educators in 2020. Through the recruitment process, I also discovered that some potential participants were not truthful about the area where they worked or what grade they worked in so that they could participate in the study. These participants were identified though further questioning about participants meeting inclusion criteria, and independent fact checking. Future researchers may need to develop ways to ensure their participants truly meet inclusion criteria. It may also benefit the academic community to study personal records

made by junior high teachers in 2020 as none of the participants used that information in this study for a more accurate self-analysis and reflection on their 2020 experiences.

Since autonomy is a topic of interest in adult learners, it certainly warrants being explored more for educators generally. Many questions arose for me in my reflections as I gathered data, for example: do teachers adopt the expectations of their school, district, etc. which is one of the reasons why they do not set their own personal learning goals? Do they feel stuck or trapped because of their position and federally mandated course curriculum? Also, how is their time management?

Other studies about 2020 might include qualitative inquiry into junior high students and their own self-directed learning development during 2020. Additionally, it appeared that the role of parents was very important for educational success in 2020 and more research could be done on how parents were able or not able to support their children in continuing their education in 2020.

Implications

As this study demonstrated, while junior high teachers during 2020 did have sufficient SDL skills to overcome the challenges presented to education due to the worldwide pandemic, there is still a need to develop more cognitive proficiency (Merriam, 2004). The skills described are not all-inclusive of every aspect of self-directed learning which indicates a lower quality of skills as well as a detriment of skills being taught to future generations.

Positive Social Change Impact

Junior high teachers and other educators can benefit from a well-rounded or holistic approach to learning and teaching in line with evidence-based research and teaching practices. This will allow them to effectively model and teach these skills to future generations. Further, this has the potential to improve the quality of personal and professional development for individual teachers, and have a positive impact on the development of self-directed learning skills in their students.

Parents were viewed as a necessary support for both teachers and students during the pandemic, and it is assumed that this is true outside of global emergency states. Parents can become more involved in the learning process to support the success of their students through collaboration with teachers and administration.

Administrative level educators now have access to data about the effectiveness or not of technology in the classroom. It is recommended that they continue to evaluate the benefits and risks of continuing to use technology in the classroom as illness is not limited to pandemic levels. This evaluation and reflection will help administrators update learning goals, methods, and curriculum for future generations. While technology policies might see an update post-COVID, it is clear for teachers in 2020 that online teaching was not considered a priority for best practice in continuing education.

Implications for Adult Learning Development

Adult learners are unique and still need development. As Knowles, et. al. (2015) demonstrated, the practice of adult learning in the United States is not yet developmentally appropriate. Additionally, knowing how junior high teachers engage in

the adult learning process is important to inform future training necessary for both online and face-to-face instruction for continuing education. It is important for the teachers themselves not to be neglected in their personal learning development. As the participants stated, many of them were focused on the wellbeing (physical and mental) of their students. This does not directly consider the personal wellbeing, especially when it comes to learning development, of educators. Educators have a vital role in our society which should not be neglected. Knowing what areas of adult learning need to be developed can help them know more clearly the types of continuing education they need so that they can effectively create developmentally appropriate self-directed learning environments. For a specific example, no junior high teacher discussed their personal or professional goals for the school year or for getting through the pandemic. This further prevented them from being able to evaluate their personal progress, and created a situation where it was impossible to truly evaluate if their efforts to learn and apply online learning were effective and supported the self-directed learning development for themselves and their students. A need for trainings on the importance of goal setting and personal evaluation may be indicated.

Implications for Discipline

Adult learners who worked as junior high teachers during 2020 were able to sufficiently take control of their learning, and change how they taught and engaged with their students. Some of the skills of self-regulated learning include strategies to regulate and organize materials and emotions, seeking help and feedback, exploring deeper learning, and managing their learning environment; organizations, flexibility, and

persistence are also listed as traits of a self-regulated learner (Cleary & Kitsantas, 2017). The junior high teachers interviewed for this study were able to use the appropriate skills to succeed in transitioning to online learning for a short time.

Research has shown us that blended classrooms (a mix of online and in person) are ideal for meeting the social, emotional, and cognitive needs of a learner. While more research needs to be done on students, research about educators is still needed. Many of them were able to learn, not only from official trainings held by their schools, but also by the individual help they received from their more expert peers, the support they had from their families, the support they had from the parents of their students, and their own determination to serve their students and continue to support their students' educational needs to the best of their abilities. Many stated that having their social needs met was easier to get in person, even while they valued what they learned about online learning and their ability to use it to continue to help their students develop cognitively. Learning development continues to be more than curriculum which needs to be continually explored in future research.

Conclusion

It has been challenging to understand if junior high teachers have the self-directed learning skills necessary to meet adult learning criteria due to the complexity of the variety of experiences that were shared by the participants. At the same time, even knowing a self-report of learning strengths can help adult learners understand the need and seek out training that plays to their strengths and which types of learning need to be strengthened. Specifically, the junior high teachers in this study did well to focus on

fostering a self-directed learning environment during 2020 as their focus was on their students' learning development. However, the lack of discussion about their own learning goals and being able to evaluate their progress toward those goals is an area for further exploration and, as this learning aspect improves, has the potential to improve their ability to further develop self-directed learning skills in their students.

This study is significant in that it fills a gap in understanding educator's lived experiences during the COVID-19 pandemic and their growth and development personally and professionally. One thing that I found enlightening is the focus that these junior high educators had on solving problems, and doing their best to resolve knowledge gaps so that they could continue to serve their students. This was important as this focus led to these teachers not being able to prioritize their personal goals for academic success. Supporting the successful development of self-directedness in learning allows for a greater capacity for appropriate cognitive development in educators and their students. This research may expand awareness in the fields of education and psychology and contribute to more meaningful training and support for educator professional development and adapting to changes in the field of education.

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Appendix A: Interview Guide

The purpose of this study is to explore and describe the lived experiences of junior high school educators' self-directed learning experiences as they adapted to online teaching due to the COVID-19 pandemic. The interview questions will focus on the self-directed learning experiences of junior high educators from March 2020 to September 2020.

Interview Questions

1. How many years of teaching you had completed by 2020:
2. Please tell me about what it was like when you learned about school shutdowns due to COVID and that you would be transitioning to distance learning?
3. Can you give an example for how you started preparing for online instruction?
 - a) What topics did you study most and why?
4. Can you tell me more about how you supported your own preparations for the 2020/2021 school year?
5. What was it like to be in charge of creating an online classroom environment?
6. As you reflect on this experience what was transition from face-to-face teaching to online teaching like?
7. What was the experience of online teaching like when you began the 2020/2021 school year?
8. Is there anything else you would like to share with me before we finish this interview?
9. Do you have any questions for me as we finish our time together?

Appendix B: Visual Self-report Learning Constellations





