

Self-Directed Learning, Lifelong Learning, and Transformative Learning in the Society  
for Creative Anachronism

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## Abstract

This study examines the connection between leisure group participation and learning activities undertaken by participants in the Society for Creative Anachronism (SCA), a medieval recreationist group. The thesis of this connection was developed through the researcher's observations during SCA participation. The intent of this study is to understand adult learning from the self-directed learning, lifelong learning, and transformative learning components derived from participant's SCA experiences. This qualitative study was conducted by interviewing eight active SCA participants, two in each participation theme of historical research, artistic representation, performance, and martial skills. Informants' responses demonstrated an integration of their leisure activity with learning. The contextualization of learning as both a primary activity and a necessary support to participation, places learning at the heart of participants' SCA related activities. The positive descriptions of learning activities, descriptive terms of ownership, and situating learning as an enjoyable activity engaged for the pleasure of the experience, provides adult educators with a fascinating glimpse of willing and engaged adult learners pursuing lifelong learning outside of the traditional educational structure. Two themes emerged during the interviews. First, bonding with others provided the motivation to continue their activities. Secondly, a feeling of commitment and belonging defined their enjoyment and satisfaction with SCA participation. The clear implications are that adult educators can create effective learning communities by developing educational structures that engage adult learners with meaningful social interaction.

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## CHAPTER ONE: INTRODUCTION

This study examines the connection between leisure group participation and learning activities undertaken by participants in the Society for Creative Anachronism (SCA) to enable participation, enhance enjoyment of their activities, or to extend their enjoyment of their experience beyond the time and involvement of actual participation. This leisure group, the Society for Creative Anachronism (SCA), is a self-contained medieval recreationist society, from which informants were asked about their involvement in order to answer the following research questions:

1. How does participation in the SCA motivate individuals to engage in self-directed learning, lifelong learning, and transformative learning activities?
2. Do participants have learning experiences beyond the enjoyment of leisure when they engage in activities as part of their SCA involvement?
3. How is the SCA constructed to facilitate learning activities?
4. Are there self-directed learning, lifelong learning, and transformative learning activities, engaged in by participants in the SCA, that are different from experiences derived from formal learning processes?

In this research, informants' views on their own learning activities, motivations, and perceptions of how other participants engage in similar SCA related learning were studied. Questions focused on informants' self-directed learning, lifelong learning, and transformative learning activities and how the construction of the SCA may contribute to it being a learning community that motivates different forms of learning. Specifically, this study addresses the following main questions:

1. How does involvement in the SCA relate to engagement in self-directed learning?
2. How does involvement in the SCA relate to engagement in lifelong learning?
3. How does involvement in the SCA relate to engagement in transformative learning?

### Context

Self-directed learning, lifelong learning, and transformative learning are important and oft used terms in adult education. Within this study, each term is considered to be a distinct activity and differentiated from the others in how they are experienced or pursued by informants. The construction of these terms within the literature of educational research has attached established definitions and meanings that aid in the development of understanding these processes and delineate the boundaries by which each term is distinguished.

Candy's (1991) constructivist approach describes self-directed learning as either a learning process or a personal development goal that develops independent and critical thought. In this study self-directed learning is considered to be a participant chosen course of action to acquire esoteric, arcane, or lost knowledge that is not available through formal learning opportunities. Self-directed learning is represented by informants' descriptions of their initiative, motivation, and persistence in pursuing personal development through learning activities.

Lifelong learning is often conceptualized as a vocational plan of academic upgrading that almost invariably refers to formalized courses within a process of schooling (Wain, 1987). Those who pursue a lifelong process of learning, outside of the formal educational structure, often do so without motivation for the traditional reward of a certificate, diploma, or degree; whereas, certification is an obvious motivator that is often connected with employment or a business goal. This type of formal learning is also delineated in time and depth and by the implied rewards available with completion. Lifelong learning, in this study, is considered to define an ongoing course of study that informants engage in to foster and develop their identity within, and contribution to, SCA society. In this study, lifelong learning is represented by informants' descriptions of striving for community belonging through the development and application of SCA related knowledge and situates informants in a lifelong activity that ties individual knowledge to societal cohesion.

Mezirow's (1991) description of perspective transformation is an evocative and useful term for describing the growth experienced in SCA learning activities. In this study, informants' descriptions of the dichotomous comparison of the SCA to the mundane world, revealed through SCA participation, is considered to indicate transformative learning. Similarly, informants' descriptions of how engaging in SCA activities have altered their perceptions of mundane life and individuals are considered to indicate transformative learning. Reflections by informants on their SCA experiences that increase maturity, as well as altered personal and worldviews that encourage the

embracing of change, are also considered to identify transformative learning.

Understanding the construction and culture of a group that functions as both a leisure society and a learning community that motivates participants to engage in and develop self-directed learning, lifelong learning, and transformative learning pursuits, may provide educators valuable insight into how to encourage nontraditional adult learning in a broader societal manner. The SCA is an organization that serves its participants as more than just a leisure society that provides a recreational activity and outlet, but as a learning environment that offers a unique and flexible learning structure within a supportive social milieu. This structure serves the needs of participants beyond traditional learning environments and does not conceptualize learning into the linear progressive system that attaches terminus points and external imposed evaluations.

This study seeks to describe this phenomenon and to explain the unique environment of the SCA as being the successful integration of a learning environment and a leisure group and to provide a context for understanding how self-directed learning, lifelong learning, and transformative learning is motivated, supported, and developed outside of formal educational structures to serve the need of adult learners.

To summarize the context of the learning activities considered, self-directed learning is viewed as the selected method, either voluntarily or through the lack of other opportunities, of acquiring knowledge and most frequently takes place in the form of learning projects. Lifelong learning is considered as engaging in serial learning activities that develop community belonging and social cohesion through the pursuit and



application of SCA related knowledge to participation. Transformative learning is considered as a willingness to consider alternatives through the reconstruction of the perceived self, and the place occupied by the individual in the mundane world, through a perspective transformation facilitated by SCA involvement.

### The Society for Creative Anachronism (SCA)

The SCA began as a May Day party centred on a medieval style tournament in Berkeley, California in 1966. The inspiration for this tournament was “The Last Tournament” held in 1839 Scotland by the Earl of Eglanton in the hope of reviving the values of the middle ages. The Berkeley tournament was a greater success and developed into ongoing events and the eventual creation of the SCA. The date of the tournament is held to be the founding date of the SCA and is the starting point of the SCA’s calendar year known as Anno Societatis (Paxson, 1992).

The SCA was incorporated under California state law in 1968 with the description of being an “international organization dedicated to researching and re-creating the arts and skills of pre-17th-century Europe” (The Society for Creative Anachronism, Inc., 2008). The rules that form the laws of the SCA, known as the Corpora, are contained within the corporate governance documents. These laws are applicable to all SCA governance decisions, except for those internationally affiliated SCA organizations in Australia and Finland.

Reminiscent of old maps, areas throughout the world in which SCA participants reside is referred to as the Known World. The Known World is divided into a number of

political entities, referred to as Kingdoms, each of which is ruled by a sovereign couple. This division is a stylized medieval administrative allocation of participants by geographic area designed to include all participants in logical proximate groupings to facilitate interaction. Kingdoms are further divided into smaller administrative areas, known as Baronies or Principalities, which support Kingdom activities, but provide more localized involvement. Within Baronies and Principalities are relatively small groups which act as administrative foci for geographically proximate members and are known by medieval terminology that reflects the group's size, such as Canton or Shire. These local groups facilitate and encourage a close association between members and provide the administrative structure and hierarchy through which local events are planned, organized, and presented. The overall structure mimics European feudal structure, in a general manner, and provides a clear tree of authority.

Groups are interactively connected through reporting requirements, common name and device registries, and cooperative participation in interterritorial competitions and events. Local groups also draw upon the larger population to support the hosting of large events. These broadly drawing events, such as the Crown Tournament required to select new royalty, the Coronation of new royalty, and intra and inter-kingdom wars, such as the Trillium Wars in Ontario and the Pennsic Wars in Pennsylvania, allow for more ambitious activities than any one local group could support with its own population. Similarly, individuals often maintain a network of relationships outside of their local group based on a spectrum of motivations including friendship, apprenticeship, military

association, and social groups known as households, guilds, or colleges. The interactive and interdependent nature of the SCA both mirrors medieval society and is an important element in developing the cohesive and cooperative nature of the SCA.

Sovereigns, normally known as King and Queen, are selected semiannually during a Crown Tournament in which all who wish to assume the crown compete for the privilege. The tournament is a series of individual stylized, nonlethal, but, nevertheless, martial contests in safely constructed armour using approved blunt weapons. The format of each tournament is dependent on the number of contenders, but follows a typical ladder or round-robin format common to many sports. Each contender must have a potential partner sovereign, usually a spouse, companion, or friend who will ascend to the throne upon the contender's victory. The noncombative member of the couple bestows the honour of fighting for his or her favour upon the combatant and takes the throne as an equal. Upon winning the Crown Tournament, the victor and his or her consort are elevated to the position of Royal Heirs for 6 months before ascension to the throne. During their time as Royal Heirs, the couple become familiar with administrative procedures and prepare for their reign. Sovereigns rule for 6 months in either a winter reign or a summer reign, to minimize the time and financial demands upon the ruling couple, to allow for a greater number to participate in ruling, and to afford a greater number of Crown Tournaments, Coronations, and other special events related to the selection and ascension of new royalty.

Regional officers, such as Barons and Baronesses, are elected by the populace in

their territory and serve for a period of 5 years. Other officers, occupying positions such as Exchequer and Chatelaine, who perform modern interpretations of the historical duties of these positions, are either elected or appointed, based on local tradition and circumstance. All positions, procedures, and requirements are governed by SCA regulations known as the Corpora, a set of rules established in modern corporate governance law, but phrased in medieval terminology and amended occasionally by elected board members, several of whom represent each of the Kingdoms of the Known World.

Paid membership in the SCA is encouraged and rewarded by lower entry fees at events and is required to compete for or hold royal office, SCA Corporate board membership, as well as lesser offices. Membership is also required to vote for local officers. However, all may participate in SCA events as long as they make an attempt at wearing historical garb of a period prior to AD 1600. The looseness of participation requirements makes enumeration of the Known World populace difficult and the only reliable numbers are based on paid membership, which the SCA estimates at 30,000 world-wide (The Society for Creative Anachronism, Inc., 2008). Local groups contain both paid members and casual participants and may enumerate as active participants a number of individuals who have overlapping allegiance to more than one group due to proximity, friendships, or particular interests.

Participants are expected to establish for themselves an alternate persona who may have existed between AD 600 and AD 1600 and to clothe and equip themselves

accordingly. Participants determine their own level of involvement and degree of historical accuracy based on desire, commitment, skill, or financial ability. All participants are considered to be persons of note and wealth and addressed by whatever title they have achieved or have been awarded. Those without titles, or whose titles are not known, are addressed as “my lord” or “my lady,” as appropriate, as a mark of courtesy and belonging. Courtesy and chivalry are two of the positive aspects chosen from mundane history to be part of the SCA and form the basis of positive and inclusive social interaction. The form of social interaction found at SCA events is the defining point of separation from the mundane world and is carried on within the enclosed society with little or no reference to the extrasocietal positions of individuals. Similarly, though a departure from the historical middle ages, is that the role of women is not defined in an historical manner and women may and do fight against men for positions of royalty and participate in general combat.

Activities engaged in by participants for their own enjoyment and to provide enjoyment to others are varied and are classified as being either martial or arts and sciences. Combat of the type used in crown tournaments is referred to as heavy combat and requires much equipment and training to ensure safety. Heavy combat is the type of fighting that is engaged by combative sides during inter and intra-kingdom warfare, with larger battles involving several thousand participants. Other martial activities are fencing, archery, and thrown weapons. Safety is a major concern in these activities, but only fencing is interactive.

The arts and sciences achieve a high level of participation and have a particular award of recognition, known as the Order of the Laurel, which is held to be equivalent of martial related honours, such as a knighthood, and are referred to as a peerage. The arts and sciences are varied and are not easily categorized, but include expected activities such as music, dancing, and handcrafts (e.g., blacksmithing, weaving, bead making, and costuming). There is great emphasis placed on participants' proficiency in developed skills, as well as the academic research conducted to support historical accuracy of participants' efforts. SCA participants often engage in several types of activities both martial and of the arts and sciences.

A frequent feature of SCA activities is scheduled educational opportunities in the form of classes or workshops. There are classes scheduled throughout the 2 weeks of the Pennsic wars, which is the largest of the inter-kingdom events. Smaller events present similar learning opportunities as part of daily activities. There are also events in which learning is the sole focus and are presented as Collegiums centred on medieval skills and historical knowledge. One of the longest running, entitled *Forward into the Past*, an annual event held in Kitchener, Ontario, is now in its 19<sup>th</sup> year. *Forward into the Past* draws academics and enthusiasts from throughout the province to learn through lectures, seminars, and hands-on workshops.

The description of the SCA as a leisure group does not provide sufficient information to understand the SCA's place in the life of its members. SCA participation is measured in years and is often the focal point of a participant's social life. The SCA

enables an alternate social reality for participants who make a significant effort to separate a part of their lives from the mundane world. Mundane is a term used by SCA participants to describe the regular world of work, school, and daily responsibilities as well as that world's populace, including themselves when not involved in SCA activities. The SCA is a created, self-contained society that exists in time carved out of the mundane world and which cooperatively seeks to recreate the middle ages as the members believe they should have been (The Known World Handbook, 1992).

#### The SCA as a Research Focus

The nature of the closed society of the SCA, which does not rely on demonstration events (e.g., recreating historical battles for public audiences or to celebrate historical occasions) to provide meaning and justification for participation, is what separates the SCA from historical recreationist groups. The SCA is an inward facing society in which history is not recreated, but a different reality is created in current time. Participants are both living a different reality and experiencing the created reality of others. Leisure groups which recreate historical battles or establish authentic period encampments or communities for public education and entertainment rely on that interaction with the public for meaning (Mateer, 2006). Meaning in the SCA is inward focused and exists within the culture and community created by the interaction of participants through which participants seek their own fulfillment, while facilitating others' meaning creation, by providing the alternate society necessary to displace the mundane world.

From an educational perspective, in the simulation game that is the SCA, participation acts as a curriculum of learning based on role-play. Participants learn cognitive, manual, and martial skills. They develop an alternate set of social skills based on emersion in a society alien to their mundane existence. They receive evaluation based on highly codified responses to the appropriateness of their engagement. Uniquely, the SCA experience is an ongoing narrative to which all contribute; with no terminus points and with an ever-changing cast of characters. Involvement is a learning experience in a simulation game of the participants' own creation and adapts to the desires of the current players.

There may be benefits for educators interested in inspiring lifelong learning in adults by examining the motivations that drive nonemployment, nonbusiness related learning, especially in the type of long term, in-depth learning, which engages hobbyists and amateur practitioners. Leisure pursuits create ideal and easily studied groups for researchers providing small, cohesive, and communally constructed organizations (Fine & Holyfield, 1996). Leisure pursuits are often structured as competitive or cooperative events and, therefore, require interaction between participants to engage in the events and tend to facilitate the forming of groups, clubs, or associations (Featherstone, 1972). Even among participants in solo-based activities, such as amateur astronomy, there are organizations that offer cooperative support to their members (Stebbins, 1982a). The SCA, being a periodically existing alternate society, without the support of a sponsoring corporate or governmental body, requires interaction and cooperation among its members



to function. The small group structure of the SCA appears to offer the sociological research opportunity that Fine and Harrington (2000) see as an “archetypal example of an organization in which interactional processes can be observed in situ (p. 312)” from which generalizations to larger societal groups may be made.

As an internal observer, the SCA appears to offer an ideal example of differently constructed institutions that exist to serve the needs of their unique population. The SCA has been established as an alternate and self-contained society with political, judicial, and social structures that can only function through interaction and cooperation among its members. The result is an inclusive society that recognizes wide and diverse interests and activities connected to the middle ages (Cramer, 2005). The SCA, self-described as a learning organization, includes learning opportunities in most large events and has, what are effectively, established educational programs within the society’s apprenticeship and mentoring activities (The Society for Creative Anachronism, 2008).

Seemingly, the learning and social needs of participants could be met within the extensive formal learning opportunities and the access to leisure time and activities available throughout the western world. However, the voluntary withdrawal from mundane society by SCA participants, although periodic, to create an alternate society suggests that participants locate within the SCA experiences unavailable in their daily lives. Parker’s (1971) framework of satisfaction versus dissatisfaction in work provides an interesting lens through which an explanation may be constructed to answer what desired aspects of life are not being met within, what SCA members would deem the

mundane world, and whether their participation provides a therapeutic experience to counter the very society that enables participation.

In the alternate societal structure of the SCA, and the resulting alternate values demonstrated by participants, a study of the SCA's unique learning activities becomes viable. Though participants are not uninfluenced by mundane considerations of the real world applicability of their acquired knowledge, the availability of that knowledge is not necessarily reliant on the educational structures present in the wider society. Also, that such an alternate society exists could point to a lack of opportunity in the wider society for participants to engage in activities that they value.

Of particular interest to adult educators is the widespread involvement in learning that is undertaken in pursuit of SCA activities and of the learning opportunities available within the SCA through mentoring, collegiums, and group projects. The value placed on the demonstration of learning within the SCA is apparent in the opportunities for the presentation of projects and in the reward structure for excellence. Formal demonstrations of skill in crafts and knowledge of medieval techniques and endeavours often take place in the form of Arts and Sciences exhibits and contests open to the SCA populace as well as in quasi-academic collegiums.

#### Researcher's Perspective

As a member and active participant in the SCA, my personal learning experiences and observations of hobby and leisure groups, particularly the SCA, led me to develop research questions of how leisure activities motivate learning, especially self-directed

learning, lifelong learning, and transformative learning. Believing that the environment of the societal construct of leisure groups is responsible for attitudes toward learning, I began to look for research that describes and explains the connection between leisure communities and learning, particularly about how learning is motivated.

Many of the activities I have engaged in or observed as an SCA participant are unique to the SCA. Heavy combat appears to have no parallel in the mundane world and bears only passing resemblance to the lethal combat of the middle ages. SCA combat styles and safety requirements have developed since the earliest days of the society and reflect increased concern and awareness of participant safety and increased knowledge of armouring materials and techniques. Applied knowledge of armouring and weapon making is an art learned within the SCA for which there is no external source of knowledge available beyond the handcraft skills used within the process, such as metalworking and leatherworking. Since individual fighters make most of their equipment and do so to personal preferences, and in regard to their own fighting techniques and abilities, they must inform themselves of the methods required to make specific armours and weapons and to seek out information through whatever sources are available. The personal and eclectic nature of this endeavour requires self-directedness, both in motivation and perseverance.

Similarly, other activities pursued within the SCA, such as reproducing textiles, garb, or embroidery, is dependent upon much self-study by participants in order to achieve accuracy and authenticity. In certain instances, the SCA affords the opportunity

to engage in experimental archaeology through presenting situations not otherwise available to test theories, and to judge historical accounts that would otherwise have to be taken at face value, such as observing the noise and confusion of battles involving a thousand or more combatants, or the practicality of archers operating in close order. The self-directedness of participants' projects becomes apparent through the individuality of the established goals and the methods through which they are pursued.

In my observation, SCA participants conceptualize learning as projects of varying length and depth. Some projects continue for years, or a lifetime, and can spawn other projects and interests. These ongoing learning efforts support participants' involvement and provide status, satisfaction, and, often, material objects and, in turn, motivation to continue to engage in new projects and to explore unfamiliar activities.

Locating sources that demonstrate a direct link between learning and leisure activities is difficult. There is, however, sufficient research of the broader sociological implication of leisure involvement suggesting that factors exist that create the desire to know more about particular topics because of leisure participation, or that those involved are drawn to specific leisure activities because of an existing interest. In turn, those activities provide an opportunity to belong to a community of others possessing or seeking similar knowledge.

In the altered world of the SCA, learning may also act as a ritualistic form of enculturation through which participants learn the core knowledge of societal constructs that is usually learned throughout childhood in the mundane world. As a member of the

SCA, I have engaged in learning activities that allow participants to become aware of the sense and meaning of the rules of social interaction that situates value structures within the context of the constructed SCA society. Thus, interaction within the SCA society, where there may be no family or friendship connections, may be facilitated, maintained, and enhanced and a feeling of community developed through an increased sense of belonging, mentorship, and the lifelong pursuits in this engaging community.

I have also observed experiences that would represent transformative learning. SCA participants often speak of the “dream” metaphor which describes the illusion of living in the middle ages experienced in fleeting moments at SCA events. The ongoing quest to refine the “dream” of a different reality is woven into the experiences and effort of the individual. From the selection of a different name to be used in the SCA to donning clothing that is beyond cultural, business, or ethnic connections, participants change themselves into others. Actions are undertaken and roles assumed that are beyond the individual’s reality in the mundane world and all are performed in a setting that is designed to remove as many modern references as possible. Events are choreographed to take on an almost theatrical appearance, but with minimal scripting and an unforeseen outcome. It is in the moments when the individual is absorbed in the created moment that Mezirow’s (1991) perception transformation may take place and allow for a different understanding of the self. In *The Known World Handbook* (1992, p. 35) Ide, writing of the pursuit of authenticity as a motivation for her SCA participation, describes a moment of becoming the other:

During the feast, when the glow of the candles softens the hard edges of reality, during court, when the ceremonial language and beautiful garb make everything seem special, I can become, for a moment, the person I am pretending to be, the person the mundane world won't let me be.

### Implications for Practice and Research

This study will have relevance and application when considering other similar hobbies and avocations such as radio enthusiasts, genealogists, amateur astronomers, hobbyist mechanics, and historical recreationists, among others. Understanding of the cultural development of a created alternate society in satisfying the needs of its population and its ability to encourage individual self-expression, self-actualization, and self-image development, will provide valuable insight into the development of effective and humane learning communities. The findings of the study, and subsequent studies, may enable educators to assist students in developing their own recreational and leisure interests as motivators to stimulate self-directed learning, in developing an interest and attitude that encourages lifelong learning, and in being open to experiences that enable transformative learning.

This research project is designed to contribute to our understanding of the self-directed learning, lifelong learning, and transformative learning experiences as described in the motivations for a sample of SCA participants and will be of particular relevance to adult educators. This study has focused on eight adult learners within the SCA. The types of learning described and the context of ownership and meaning expressed suggests

that this study might guide adult educators in creating learning experiences of greater meaning for their adult learners. The environment of adult education and the needs and expectations of adult learners might then draw strong connections with the self-directed learning, lifelong learning, and transformative learning described by informants.

## CHAPTER TWO: LITERATURE REVIEW

This literature review has been constructed to follow three interconnected educational themes: (a) Self-directed learning, (b) lifelong learning, and (c) transformative learning. Each of these themes is viewed as a component of the larger topic of learning within leisure and, though there are many overlapping issues and discussions, they will provide the context for the discussion of how leisure community participation benefits the individual learner.

The overlay of this three-part thematic educational framework looks at what is best described as postcompulsory learning (Jones & Simon, 2001). However, the eclectic and exotic nature of the subject matter makes much postsecondary learning supportive rather than directly applicable and is not considered within the framework, though such education is assumed to be available and accessible by a large number of participants. Instead, the instrumental basis of traditional learning is the foundation of comparison to which self-directed learning, lifelong learning, and transformative learning are being contrasted.

This study considers four main themes around which learning is constructed and with particular relevance to the SCA. These four themes are: (a) historical research, (b) artistic representation, (c) performance, and (d) martial skills. The literature was examined for connections to these four themes in order to establish a context by which informants' involvement could be examined and analyzed.

Historical research lays the foundation for participants' involvement in the SCA. It is the one activity in which all informants would be expected to have initial and ongoing participation. Historical research is required for participants to understand the



expected parameters upon which the SCA is constructed and is necessary as a design tool in creating their SCA persona and in creating or acquiring appropriate garb. All SCA activities, other than martial arts and administrative tasks, contain a historical research component.

Artistic representation describes activities connected to artifact creation. In association with a participant's historical research, garb is created or acquired which presents a desired image of social rank, personality, and authenticity. Knowledge and use of period techniques, materials, and tools is balanced with mundane considerations of ability, time, and finances to create an artifact that satisfies the needs of the producer as well as acting as contribution to the attempt to create an authentic medieval experience for other participants at events.

Performance occurs as two distinct activities. First, all SCA participants perform in the sense that they contribute to the created social milieu by portraying medieval behaviour within the confines of an acceptable modern interpretation. This takes the form of remaining in character as well as periodically contributing to events by becoming actors at required times and assuming a defined role when participating in spectacles, ceremonies, and rituals. Secondly, some SCA participants deliver performances as entertainment for other participants. This activity is a minority role and requires different skills and has different expectations of ability.

Martial skills encompass all martial activities and include fencing, archery, and thrown weapons, but has a particular subset referred to as fighters who engage in heavy

combat; it is within this subset that martial skills are considered.

### Literature Review Process

I conducted my search for relevant literature within a simple, but systematic framework. Beginning with foundational reading of well known educational writers, such as Brookfield, Mezirow, and Cranton, I developed a framework of self-directed learning, lifelong learning, and transformative learning situated within formal educational structures.

Many educational authors make assumptions about learners' abilities and motivations as well as the function of the types of learning that, in general, serve the needs of society through teacher delivered institutional curricula. To reach beyond literature written by and for educators, I reviewed the works of authors who examined leisure pursuits, particularly Stebbins (1982a, 1982b, 1992a, 1992b, 1997a 1997b, 2005a, 2005b) and Parker (1971). Generally these authors place leisure as an individual pursuit driven by motivations that are separated from the requirements of life and supportive of a perception of the quality of life, rather than education which is often supportive of employment and civic responsibility and awareness.

Searching for SCA related literature returned few academic publications, of which most were sociological or ethnographic studies. The most useful written information about the SCA comes in the form of the society's *The Known World Handbook* (1992), which mostly consists of articles that previously appeared in an SCA quarterly magazine entitled *Tournaments Illuminated*. Unfortunately, I have not been able to access many

issues of this magazine which consists of articles written by SCA participants who provide information and advice to readers and act, to an observer, as informants explaining the activities and culture of the SCA

Searches of academic databases which combined various search terms, such as leisure, self-directed, lifelong, transformative, learning, SCA, among others, in different combinations, returned few relevant articles. Most useful to understanding the construction of SCA as a leisure society that serves its members have been articles about the sociological understanding of leisure groups and their members. Though somewhat tangential to the subjects of both learning and the SCA, I believe that valid inferences may be drawn from examinations of better understood leisure groups and situations and that these inferences will form the basis of a framework with which to examine learning within the SCA.

### Self-Directed Learning

A difficulty in investigating the type of learning that is beyond the confines of traditional education is in the terminology used. Learning that goes on outside of the formal education system is often described as self-directed, nonformal, or informal, though there is no consensus on assigning meanings to these terms. Self-directed learning is variously described as a skill set of a student that is beneficial in a formal setting through to the most extreme description as autodidacticism. The meanings used in literature focusing on self-directed learning are dependent upon both the perspective of the author and the field to which these perspectives are being applied.

Brookfield (1993) writes in an effort to reframe self-directed learning as political expression that moves the practice of adult education from the humanist to the critical perspective. Within the critical perspective, self-directed learning becomes a method of resistance and a challenge to the repressive powers and inclination of the state.

Brookfield points to a difference in the construction of a critical perspective that is based on American versus European experiences. Within the American experience, in which individuality is paramount, repression is to be guarded against, but not feared by virtue of past triumphs and because of the development of the United States on the premise of liberty and justice for all. European perspectives are informed by decades of turbulence, repression, and fear of future conflicts. According to Brookfield, the experiences of the two cultures cause a different interpretation of the self and the individual's place within society. This difference explains the development in the United States of self-directed learning as a humanistic construct in which personal development is the goal of participants.

Brookfield (1993), however, places the belief in fostering individual ownership of learning in the United States in a context of being contrary to the centralized controlling nature of federal policies of core curricula and the required adherence to beliefs in boundaries formed by concepts of patriotism, morals, and subversion. These boundaries, he argues, provide a form of self-censorship that a critical perspective of adult education would address. Brookfield asks us to consider that

If we place the self-conscious, self-aware exertion of control over learning at the

heart of what it means to be self-directed, we raise a host of questions about how control can be exercised authentically in a culture which is itself highly controlling (p. 234).

Interesting is the application of this perspective to the development of the SCA which originated in California and has its greatest population in the United States. Brookfield's assertions raise the question of whether the SCA originated in the United States because of the freedom felt by the individual to seek self-expression through the development of eclectic and esoteric knowledge, or because SCA activities involve perceived nonadult, and, therefore, potentially subversive activities, such as play and pretending, which require insulation from the mundane world. Using Brookfield's evaluative lens of individual control, these SCA activities can be viewed as learning activities providing participant directed structure to what might otherwise be considered as merely recreational pursuits.

Bolhuis (2003) advocates treating self-directed learning as a skill that can be imparted by teachers through an emphasis on the teaching process. This approach views self-directed learning as having value beyond both formal education and vocation. Bolhuis believes that being self-directed as a learner enables the process of lifelong learning in ways more important than traditionally viewed and vital in fostering adaptable, critical, and democratic attitudes. Nevertheless, in this context, self-directed learning is dependent upon the formal education system enabling the skill. This context implies that there should be prescribed characteristics, more suited to the attitude of a

programmed approach than one internally constructed, or found externally in an alternate learning opportunity, to achieve the goals and values promoted by Bolhuis.

Greveson and Spencer (2005), writing from a vocational perspective, refer to how the existing belief structure of medical education regards self-directedness in learning as an inherent quality of successful doctors. They describe and challenge this assumption as dismissive of the need to foster such skills and motivations. The authors encourage the development, during the educational process, of the belief among students of the value of self-directed learning. As with Bolhuis (2003), Greveson and Spencer view self-directed learning as a skill set to be imparted by the formal education structure and no consideration is given to the possibility that motivation to self-direction might be found outside of structured education.

Attitudes to self-directed learning may influence the value placed on such learning and even the perception of whether valuable learning exists beyond formal structures. Hewitt-Taylor (2001) reports on the findings of a study of self-directed learning in the medical field. The study focuses on students' and teachers' views of the meaning of self-directed learning and its value and role within the education of nurses. Overwhelmingly, the study emphasizes the role of self-directed learning within a traditional educational process. Knowledge gained was only measured within the scope of the course and was seen as an adjunct to the standard learning procedures. As with Greveson and Spencer (2005), self-directed learning was seen as indicative of certain personality traits and level of development. Not addressed was the value of self-directed

learning beyond the narrow construction of the study, nor the views of participants of the learning of others who may not have been represented by this group of similarly educated individuals. Also not examined within this study was whether the medical community, or similarly any other professional field, forms a learning society by virtue of its specialized training and shared experiences within an environment unique to that field. A learning society within, and defined by, an area of specialized knowledge is a concept of which greater knowledge would offer more in-depth understanding of groups such as the SCA.

Knowles (1980; as cited in Merriam and Caffarella, 1999) describes self-directedness as a psychological need of mature adults, a belief that situates self-directedness as an ultimate linear value correlated with maturity. Knowles' belief is echoed by Guglielmino's (1977; as cited in Merriam and Caffarella, 1999) definition of self-directed learning readiness as an attribute related to, and indicative of, having achieved a level of psychological development and describes the requisite characteristics in positively constructed terms such as initiative, independence, and persistence.

Candy (1991; as cited in MacKeracher, 2004) also describes the ideal self-directed learner through the demonstration of positively described characteristics. Whether this list is indicative of a self-directed learner or a model for success within existing structures is not clear. Mackeracker questions Candy's conclusions by asking whether "self-direction in learning is a consequence of success in learning, rather than a required, pre-existing competency?" (p. 47). Unasked is whether these attributes are more indicative of those who have attained success within our institutionally measured system.

Reagan (2003) describes a study designed to examine what motivates students to engage in self-directed learning. The article is related through the perceptions of two groups, students and tutors, in order to examine differing perspectives. The use of the term self-directed, however, is misleading in this study, as Reagan admits. She concedes that the term is too connected to coursework to truly indicate self-directedness and prefers the term self-managed learning. Of particular note is that she finds the most significant motivator to be a good lecture, further supporting the finding of being self-managed within a traditional educational structure.

Tough (1971) explored the phenomenon of self-directed learning by adults through research conducted by Tough and others in 1970. The focus is on self-directed learning projects which Tough describes as a highly deliberate effort to learn and retain knowledge, skills, or information for at least 2 days after the effort. The range of learning activities is broad and none are dismissed by use of threshold criteria of value. Tough discovered that some projects can last for years, others for a matter of hours, with some learning projects running as high as 2,000 hours per year with an average project lasting 100. Adults were found to average eight learning projects a year with the higher range extending to 15 or more.

Tough's (1971) phrasing is humanistic and analyzes the motivation of participants as variously constructed self-improvement, that reflect the values and beliefs held by the learner. Although mainly chosen, planned, and executed by the individual learner, Tough found that 70% of adult learning projects are planned by the learner and that programmed



instruction, group efforts, and consultation with experts is also accessed. Tough concludes that classroom teachers can help students develop the skills, characteristics, and the confidence required to pursue self-directed learning through projects outside of formal education.

Tough (1971) does not speak of motivation to engage in self-directed learning, but he does suggest that this learning method is chosen to fulfill the specific needs of the individual. The personal nature of projects chosen draws an obvious parallel with the self-directed learning projects undertaken by SCA participants. My observations of SCA participants' projects, varying in length, depth, and intensity, in which participants access an assortment of available resources, demonstrate the validity of applying Tough's findings to a specific group.

Tough is also a member of the Research Network on New Approaches to Lifelong Learning (NALL), a community of scholars and organizations led by David Livingstone (2001) at the Ontario Institute for Studies in Education (OISE). The group's interests lay in better integrating informal learning with more formal situations through overcoming the obstacles of social barriers. NALL has a series of ongoing projects that, among other things, identify and document the methods, depth, and participation in informal learning. Their findings are published on their website, which appears to be the only current publication of their project's findings.

Because the purpose of NALL is action to overcome barriers, the project focus is on vocational issues, political concerns, and emancipatory action and does not concern

itself with leisure pursuits. One of NALL's project groups, which does not appear to have yet published on-line, is studying informal learning cultures that may provide a better understanding of successful promotion, and possibly positive valuing, of informal learning activities.

Most useful is Nall's published data on the definitions, occurrence, and practice of informal learning (Livingstone, 2001). For purposes of these surveys, Livingstone describes informal learning as "anything that people do to gain knowledge, skill or understanding from learning about health or their hobbies, unpaid or paid work, or anything else that interests them outside of organized courses" (p. 11). Livingstone's definition is purposely broad to include all forms of informal learning of which self-directed learning is a subcategory. His definition goes beyond formal institutional or employment based situations and allows for more discussion of learning outside of academic or vocational motivations. Livingstone's research has demonstrated a large involvement in informal learning across professions and societal position. However, Livingstone does admit the difficulty in obtaining meaningful responses to surveys that ask about informal learning, pointing out that the tacit nature and the broad application of the activity does not facilitate easy measurement.

As may be expected with NALL's goal of overcoming social barriers to learning, there is the contextualizing of self-directed learning as an act of resistance. The interpretation of obstacles as political or social inequality is the basis for critical theory perspectives on education, which is not necessarily of value in understanding SCA

learning activities. However, I would draw a parallel, in view of Brookfield's (1993) concept of perceived subversion as a motivator for self-direction, between SCA connected learning and the obstacles assumed within the critical theory paradigm.

### Lifelong Learning

Jones and Simon (2001) make the point of identifying postcompulsory education as the foundation and meaning of lifelong learning and this postcompulsory basis would seem to be a useful definition for the purpose of this study. In contextualizing lifelong learning as postcompulsory education, consideration of the field of adult education may be expected to add to the discussion.

The majority of lifelong learning would appear to be vocationally oriented (Jones & Simon, 2001). However, this orientation may have more to do with the constraints placed upon how learning is defined and participants enumerated. Livingstone (2001) and Tough (1971) both found that much learning goes on beyond what would normally be considered school-based education and have analogized this phenomenon as an iceberg.

In the Editor's Note that begins Kenneth Wain's book *The Philosophy of Education*, published in 1987, the concept of lifelong education is described as a recent development. In view of Livingstone's (2001) and Tough's (1971) works, this recent development appears to apply to the acceptance and participation by the formal educational community of an activity that is already extant in adults' daily lives. The entry of governments and formal education institutions into lifelong learning places the value of learning into quantifiable, expert based studies that, to Wain, "keep education

apart from life” (p. 135).

Wain (1987) criticizes liberal philosophers for rejecting informal and nonformal education and restricting consideration of education to formal settings. He also criticizes lifelong education theorists, without naming them, as opposing deschooling from a position of self-interest. This perspective is a critique of what is perhaps a natural and expected interaction of a bureaucratic education system and its sponsoring governmental administration, whose involvement must be of broad-based quantifiable and justifiable application. However, he does speak of the need for an education program, even if this is self-selected. Wain speaks of recontextualizing learning away from schooling and encourages the employment of touchstone theory, which he describes as being of comparative rather than relative based reason. He sees formal western liberal education methods as contrary to fostering a concept of lifelong education due of its reliance on a collective organization which he describes as inauthentic.

Though the SCA operates as a collective organization, learning facilitated through SCA involvement fulfills Wain’s (1987) necessity of lifelong learning being a voluntary and personal activity because of its leisure basis. The integration of SCA learning with a participant’s own motivations and to further the development of his or her created persona removes learning from the institutional control of methods and goals and situates the learner as the focus of the process. The absence of a linear definition of learning success, as is required within formal schooling, places learning as an ongoing activity engaged in to fulfill the needs of the learner and reconceptualizes the process away from

age categorized schooling.

Wain's (1987) ideal is to develop a learning society that is not restricted to age or privilege, "nor a gift handed out to him (the individual) by his guardians" (p. 161). This society is described as one "designed to be supportive of individual lifelong education" (p.203). Within his description of the traits of this society, Wain establishes a framework that can be applied to studying the effectiveness of leisure activity groups, such as the SCA, as learning societies. He cites Sucholodolski's (1976) belief that situates lifelong education in the social circumstance that provides motives for societal development. Societal success is measured by the amount participation that Wain sees in Dewey's (1930) belief that "men live in a community in virtue of the things they have in common; and communication is the way in which they come to possess things in common" (p. 207). In these shared beliefs and values, individuals find meaning, a meaning that might be transparent and assumed within daily society, but is apparent and purposeful in voluntary leisure group participation (Fine & Holyfield. 1996). SCA participation is a cooperative creation of meaning, relying upon a common understanding of the dream analogy, which requires the development of a community to facilitate the collective goal.

Interesting for its connection to the SCA, which seeks authenticity in pre-industrial crafts and modes of activity, is found in Suchodolski's (1976; as cited in Wain, 1987) suggestion, that the ideal learning society disowns production society and the classic attitude of the consumer society whose goal is self-realization. Though there is reliance on a material culture within the SCA (Sparkis, 1992), consumer activity does not

appear to be valued as highly as individual accomplishment in the production of goods. However, the SCA is only a temporary rejection of mundane society and culture and participants' consumer needs and desires may be satisfied within mundane society.

Stebbins' (1992) seminal work on serious leisure describes and connects various pursuits that would fit into the category of leisure or recreation, but not, as Stebbins points out, are they necessarily leisurely. An accurate or universal description of these leisure pursuits is difficult, but Stebbins does at various points refer to them as avocations, which would seem an appropriate descriptor for my study group. Of particular interest is his characterization of participants' pursuit of their avocation as a career. This perspective seems an apt characterization, but the phrasing and the context of his analysis is framed by forecasts of economic and technological changes that would result in a radical reduction in work hours and the need to find other meaningful activities as a replacement. In this regard, career may be a useful transitional term used to add credence and justification for such a great expense of effort and time in an era when leisure was more thought of as relaxation.

Stebbins (1982b) pursues his analogous and positive description of the phenomenon of serious leisure by associating eight benefits unique to these leisure activities, namely: "self-actualization, recreation or renewal of self, feelings of accomplishment, enhancement of self-image, self-expression, social interaction, and belongingness" (p. 257). The close connection of these benefits to my observations of reasons for SCA participation suggests that these benefits serve as useful categories

through which to analyze SCA participation and motivation.

Stebbins' (1982b) positive view of serious leisure demands "the development of skills and knowledge, the accumulation of experience, and the expending of effort" (p. 267). To support this view, he quotes Cicero who describes leisure as "all those virtuous activities by which a man grows morally, intellectually, and spiritually. It is that which makes life worth living" (p. 267). Stebbins' work on serious leisure was written with a belief in the expanding of free time connected with the reduction of work brought on by technological innovation. However, with the opposite of an increased amount of time spent connected to work and commuting in North America, Cicero's conclusion may be a useful explanation for why so much effort is put into a leisure career.

Stebbins has also written numerous other articles about various aspects of leisure. In his study of Amateur and Professional Astronomers (1982a), his characterization of a leisure career can be seen as a suitable descriptor. In this study, amateur astronomers have found a role in a symbiotic relationship with professionals in which they act as an educational and recruiting group to the public and, in return, gain access to data and equipment.

Stebbins' articles about other classifications of leisure, Casual leisure: a conceptual statement (1997), and Project-based leisure: theoretical neglect of a common use of free time (2005b), further develop his separations and definitions of leisure and make clear the distinction of the type of serious leisure that can be classified as careers or avocations. What is also clear is how the language used to describe various leisure

activities is imbued with value and judgment; though Stebbins (1982b) does not examine the assigned descriptions other than for clarity of classification. From these classifications Stebbins (1982b) argues that participants are affected by language and select or deselect activities based upon desired social standing and perception.

The language selected by Stebbins (1982b) places leisure pursuits into a parallel world of acceptable adult activities. The terms serious leisure and leisure career, for example, appear to be chosen as a means of legitimizing leisure activities by moving them away from activities normalized to childhood that the use of the term play would suggest. SCA activities are often described as play by participants, but beyond describing engaging in sports and games, this metaphor is absent from adult leisure. Though play is well studied as a viable delivery method for prescribed curriculum (Flewelling, 2005, Grugeon, 2005, Leach, 2005), it remains as a childhood referenced learning activity.

The problem of defining leisure is an obstacle to understanding both its value and function. Beatty and Torbert (2003) confront the dichotomous terms of work and leisure in an effort to better understand the meaning of each and to reconstruct consideration into complementary concepts, beginning with the accepted definitions which lead to conceptualizing leisure as time not working and, therefore, without real value. This viewpoint is based, as Stebbins (1982b) might agree, on a Protestant work ethic that places work at the pinnacle of virtue and leisure as a supporting function, but this view contrasts with Parker's (1971) suggestion that work and leisure are synonymous. Beatty and Torbert describe various types of leisure based on setting, level of activity, and



production, but come closest to a workable definition when they refer to the voluntary abandonment of leisure time by those most motivated to continue working (e.g. specifically, Bill Gates, Warren Buffett, and Richard Branson), but also other professionals driven to spend most of their time working. There is an assumption that those individuals cited are not working for needed remuneration but for other types of fulfillment. This definition would seem to place motivation in the selection of activities, leisure or career, as the fulfillment of personal development

Beatty and Torbert (2003) suggest a cultivating of leisure that intertwines both time and attitude. The dichotomous consideration of work and leisure is a zero-sum game; as one increases, the other must, of necessity, decrease. Being written from a management studies perspective, not surprisingly, they suggest several time effective, reflective activities, also described as leisure, that will refresh and support more focused participation in both work and other leisure activities. Also suggested is incorporating the spirit of play in more daily activities as a method of integrating an aspect of leisure into work. Beatty and Torbert see such integration as rather a reintegration of something lost to industrialization, as the development of a broader societal reconstruction that seeks to provide greater, or to replace missing aspects of, fulfillment within daily life. Within the SCA, I have observed that activities are undertaken outside of participating at events that serve to extend participants' engagement in the current middle ages through shifting perception of one's mundane surroundings. Food is a major focus of SCA participation both in preparation, composition, and consumption and can provide a medieval

experience to a participant in the most mundane surroundings as suggested in the humorous advice in the article *Eating Medievally in the Mundane World* (Schneider, 1992).

### Transformative Learning

Transformative learning is often conceptualized as a realization of social inequity and instability which inspires the enlightened learner to change his or her perception of assumptions and core beliefs (Mezirow, 1991). However, my consideration of transformative learning, as located within participants' SCA experience, is placed within the context of personal growth and reconceptualization and is not necessarily connected to addressing broader social issues. Instead, transformative learning may provide the learner with a different, or even alternate, situating of their own self-concept within the broader mundane society as distinct from the created world of the SCA.

Mezirow's (1991) concept of transformational learning situates learners within a paradigm of socially constructed assumptions and beliefs from which, through critical reflection, they will be liberated to challenge and revise their meaning structures. Mezirow's framework allows for two responses to a challenge to a learner's meaning structure of either rejection of the challenge or an alteration of existing perspective. Mezirow's binary approach conflicts with his critique of western rationalist tradition by assuming that learners cannot hold as valid conflicting meanings and that intellectual growth is premised on the acceptance that knowledge is relative and perceptions are valid only within a set of self-supporting, socially constructed beliefs. For transformation to

occur, the learner must experience a shift in his or her meaning structure, for which Mezirow relies on instructors to facilitate, by challenging the core belief structures of learners, as well as their perceptions of others' meaning structures (Mezirow, 1991, 1996, 1997).

The development of autonomous thinking figures prominently in Mezirow's (1997) framework of transformative learning. In describing the process of transformative learning, Mezirow draws on Friere and Habermas to support his assertion that meaning is constructed intersubjectively and, therefore, within an educational framework, communication between instructor and learner is the necessary catalyst to transformative learning (1997). In postcompulsory education, this learner-educator relationship might not exist in the traditional role structure, either because of the nature of the subject matter or because the learning is not part of a requirement for certification (Dirkx; as cited in Dirkx, Mezirow, & Cranton, 2006). In a broader construction of transformative learning within adult education there still exists the opportunity for communication between individuals through which Mezirow's (1997) framework can be applied, without the necessarily hierarchical structure of traditional education. Dirkx observes that the individual can choose the nature of his or her interaction within learning situations and, thus, engage in transformational learning of particular meaning to the learner.

The understanding of one's own self-concept is defined by Mezirow (1997) as one of the three aspects of meaning perspectives. Dirkx (1997) describes his belief that the individual learner's self-concept is at the heart of understanding transformative

learning since the process of learning is a negotiation between the self and other, defined by Dirkx as anything, anyone, or any group separate from the self (p. 83), and situated within social constructions in a dynamic interaction. Dirkx (2001) uses the word “soul” to express his belief that self-concept and self-knowledge is understood through image and symbol and exists beyond a purely analytic examination. The word soul, we are warned by Dirkx, may be considered as an inappropriate descriptor and dismissed, by what Habermas (1971) may describe as a “technocratic consciousness,” as not in keeping within our scientific based postmodern society.

Habermas (1984) posits a circular explanation of communication that connects language and society in a dance of influence in which language forms societal beliefs, structures, and institutions, which, in turn, affect the formation and use of language in that society. At the heart of this theory is the concept that meaning structures are assimilated by individuals uncritically because the means of understanding is intertwined with both the experienced reality of the individual and his or her means of explaining or communicating that reality.

To examine and explain knowledge Habermas (1984) divides knowledge into three types: instrumental, practical, and emancipatory. This division forms the foundation for the hierarchical assessment of knowledge by advocates for transformative learning. Within this structure emancipatory knowledge is conceived of as transformative and requires the learner to reframe his or her perceptions in order to assimilate new knowledge or interpretations that conflict with uncritically held beliefs. Similarly, it may

be considered that SCA based knowledge of the middle ages provides a foundation for understanding modern assumptions inherent in language use, the role of institutions, and social interaction. Understanding the fundamental belief structure from which modern western society has grown provides the tools with which to understand our own personal and institutional biases and preferences.

However, that a hierarchy of knowledge types is imposed is evident in Cranton's (1994, 2002), and Cranton and Roy (2003), and Mezirow's (1991) belief that transformative learning ought to be the ultimate goal of both educators and learners. Cranton (2002) elevates transformative learning in language that suggests almost religious revelation, to describe an incident in which a student casts off his "confusion and resentment" and "announced that he saw, accepted, and clearly understood the shades of grey existing in knowledge about teaching. He understood that knowledge about teaching is communicative in nature and socially constructed" (pp. 63-64). Cranton described the moment as joyous. Rather than challenging the structure of higher learning, Cranton seeks to affect attitudes that would not require a change to the basic hierarchical establishment, although she professes the need to challenge the basic assumptions inherent in educational structure. Her strident belief in the value and power of transformative learning, by both teachers and students, verges on sermonic fervor and assumes the need for individuals to alter their fundamental belief structures as an indicator of true learning.

If personal awareness and reconceptualization of the self is the by-product of an

amended social connection due to the effects of transformation, the degree of fulfillment experienced by the participant may dictate the extent of the transformation. To Parker (1971) the fulfillment provided by leisure activities is difficult to measure for an observer and, as Jones (2000) describes, fulfillment may be thought to be outweighed by the apparent costs, however defined. Jones uses examples of a football fan whose team continues to lose and the persistent but unsuccessful amateur performer, among others, to show that by objective assessment the leisure activity is unprofitable. Jones agrees with Stebbins' (1992) profit hypothesis that participants continue their leisure engagement because they receive greater rewards for participating than they expend. However, Jones sees the social identification that the individual acquires, or he or she perceives to acquire, as being of greater value to the individual than Stebbins' eight benefits.

For Jones (2000), the value of the individual's assumed role defines his or her identity as positive and fulfilling and that role includes membership in a social group. Demonstrating that social groups include what may be primarily solitary pursuits, as did Stebbins (1982a) with amateur astronomers, Jones asserts that the individual's self-image is defined by group association. Interesting for this study is Jones' belief that "membership of a social group, and being seen by others to be a member of a group, is an important mediator of an individual's cognitive, affective, and behavioural processes" (p. 284).

The setting of leisure activities may be expected to have an effect upon the selection and type of interaction by participants. Jones (2000) points to the arousal factor

that fans experience at football games as a motivator for participation. Similarly, Lengkeek (2001) equates the value of unfamiliar surroundings to the tourist as providing a tension to consciousness that spurs the imagination and creates the sense of enchantedness to travelling. This concept of enchantedness is very similar to the dream metaphor of the SCA as a motivation to leave the mundane and experience a different reality.

Lengkeek (2001) relies upon and reformulates Cohen's (1992; as cited in Lengkeek, 2001) modes to explain the serious leisure connection of the tourist experience. Most interesting is the treatment of metaphor in creating a different reality, however temporary, that serves to stimulate imagination and alter perspective. The transformative association of an altered reality is a common literary theme that allows the individual to grow, both in spirit and in knowledge, and stimulates a desire to pursue greater understanding of one's self and surroundings. The experience modes to which Lengkeek refers place value not in the activity itself, but in the perceptions generated by the participant.

Simulations, such as role-play, re-enactments, and the SCA, provide a form of temporary, safe altered reality for participants. Meltzoff and Lenssen (2000) see simulations as providing an opportunity to develop an understanding of how an individual's culture informs the "attitudes, beliefs, and behaviours of self and others" (p. 30). They term this cultural competence and believe that simulations develop empathy and understanding through providing transformative perspectives.

Cramer (2005) quotes Jestrovic's (2002) description of the theatrical effect of transformation wherein "one deliberately transforms I into other, turning the familiar, supposedly intrinsic self into his/her own stranger" (p. 86). Cramer's work is his doctoral thesis about performance in SCA, which he sees as a communal stage in which participants embrace the dream to create their own reality of a reworked ideal middle ages to "create communities and selves in which the medieval and modern intersect in a very postmodern way" (p. 79). These SCA participant-created personas and communities allow and encourage the development of the individual in knowledge, skills, and self-image that are outside of his or her normal sphere of experience and without the restrictions, placed or assumed, that govern activities in a mundane world.

The SCA publication, *The Known World Handbook* (1992) may be seen as both a source document and a travel guide to the SCA. The handbook describes how to participate in various activities, how to obtain further information, and includes brief explanations and warnings about interactions such as cultural conventions and societal legal observations. Of general interest is the effort placed in developing a period environment through knowledge of historical artifacts and cultures, as well as encouraging the acquisition of knowledge more in-depth than that which is briefly presented. However, as with Langkeek (2001), the pursuit of refining the perception of the altered reality of society events, referred to as the dream, figures prominently. The dream pursuit demands an understanding of various aspects of medieval culture, technology, and attitudes that encourage the formulation of self-directed projects tailored



to the needs of the individual. In turn, these projects blend and inspire other projects in a lifelong process of learning. Whether the perception transformation is the goal or an experience that encourages participants to pursue further growth, or whether it performs both functions is unclear.

In this research, self-directed learning, lifelong learning, and transformative learning are considered for a sample of participants in the SCA. Self-directed learning is viewed as the selected method, either voluntarily or through lack of other opportunities, of acquiring knowledge and most frequently takes place in the form of projects. Lifelong learning is considered a process of ongoing learning in which SCA participants engage in serial learning projects, some as a continuing course of study of one subject and others intended to explore new areas of knowledge, in furtherance of their enjoyment of their SCA participation. Transformative learning is being considered as a willingness to consider alternatives through reconstruction of the perceived self and the place occupied by the individual in the SCA or mundane world.

Self-directed learning remains hidden, for the most part, owing to the nature of the activity (Wain, 1987). There are calls for community support for self-directed learning (Collins, 2006; Milagros & Cadona-Carlos, 2007), a support that is available within the SCA (Cramer, 2005; *The Known World Handbook*, 1992). Fenwick (2006) describes the benefits that would result, both to the individual and to the community, from continuous collective learning activities within an organization with traits similar to the SCA. This view is echoed by Sydor's (2005) description of the social development

that has occurred in what she terms as ritualized communities, which is a term that aptly describes the SCA. SCA participation offers self-directed learners a forum, a stylized presentation method, and evaluation of their work by other subject matter experts without the demand of academic credentials.

The phenomenon of the creation of the altered world that is the SCA and the depth of involvement of participants, including the planning and effort that is a part of developing a leisure career within the society, suggests that SCA participation provides a form of interaction and expression that is not otherwise available within general society. This group may be more noticeable in its eclectic and exotic pursuits and activities than other leisure groups and organizations, resulting in the SCA's insularity from general society. Such insularity may imply a rejection of a society that does not offer the opportunities for self-expression that participants require, or it may be that such activities demand a forum insulated from mundane life to allow sufficient freedom to engage in their chosen reality. The environment of a different reality in which participants consciously become others suggests a deliberate effort to engage in activities outside of normal societal roles and may afford individuals the opportunity to experience a perspective transformation.

## CHAPTER THREE: METHODOLOGY AND PROCEDURES

The goal of this research is to develop a better understanding of how involvement in the SCA motivates participants to engage in self-directed learning, lifelong learning, and transformative learning. My assumption is that leisure pursuits offer the structure that facilitates the learning needs of participants in a manner that is different from traditional forms of education.

### Purpose of the Study

The study is intended to determine how self-directed learning, lifelong learning, and transformative learning are experienced in the SCA and considers the unique cultural setting of the SCA and the Society's role in providing participants with an environment that is not only supportive but encouraging of citizenship. Whether participation is itself a learning experience is not the subject of the study. Rather, degrees of learning are explored within the unique cultural milieu of the SCA. The motivational origins derived from participation in the SCA are considered to determine the role of the societal construct in developing a learning environment. This study considers self-directed learning, lifelong learning, and transformative learning to be components of the learning engaged in to support, or derived from, participation in historical research, artistic representation, performance, and martial skills.

### Research Questions

This study seeks to answer the following main questions:

1. How does involvement in the SCA relate to engagement in self-directed learning?

2. How does involvement in the SCA relate to engagement in lifelong learning?
3. How does involvement in the SCA relate to engagement in transformative learning?

### Methodology

The study examines the connections between participation and learning activities undertaken by members in the SCA, to enable the participation, enhance enjoyment of their activities, or to extend their enjoyment of their experience beyond the time and involvement of actual participation. Informants were asked about their involvement in order to answer the following research questions:

1. How does participation in the SCA motivate individual participants to engage in self-directed learning, lifelong learning, and transformative learning activities?
2. Do participants have learning experiences beyond the enjoyment of leisure when they engage in activities as part of their SCA involvement?
3. How is the SCA constructed to facilitate learning activities?
4. Are the self-directed learning, lifelong learning, and transformative learning activities, engaged in by participants in the SCA, different from experiences derived from formal learning processes?

This study is designed as a phenomenological, descriptive, applied, qualitative, interview research study that focuses on informants' self-directed learning, lifelong learning, and transformative learning derived from, or inspired by, involvement in SCA

activities. This study considers four main themes around which learning is constructed and with particular relevance to the SCA. These four themes are: (a) historical research, (b) artistic representation, (c) performance, and (d) martial skills.

The four participatory themes were selected as descriptive of a useful categorization of all participants' SCA involvement. In order to achieve a representative sample of SCA participants, informants were selected based on their participation in one of the participatory themes. Each, however, was likely to have experience in more than one of these themes and may possess insight into whether there are similarities or differences in study, research, or practice. Differences in perspective or experience based on gender were addressed by the selection of 1 male and 1 female informant for each participatory theme.

Three collaborators were engaged to select the informants to be interviewed for this research. Each of the collaborators has been extensively involved in the SCA for a considerable time, has recognized status, and is acquainted with a wide range of SCA participants. Each collaborator was presented with an interview guide (see Appendix B) and asked to name one male and one female as an ideal representative for each of the four participatory learning themes of historical research, artistic representation, performance, and martial skills. Collaborators were also asked to select alternate nominees. Descriptions of each category were provided as was the research proposal. Collaborators developed their lists independent of each other and without knowledge of the identity or number of other collaborators. The other role of the collaborators was to assess and

critique research assumptions, suggest alternate approaches, and to provide input into the nature of questions to be asked.

Informants were selected from collaborators' lists by the interviewer and chosen first, by being unanimously nominated, and secondly, by being nominated by two of the three collaborators. Informants were contacted by email at addresses listed in online SCA resources and provided with a Letter of Invitation (see Appendix C). Telephone interviews were scheduled through negotiation at times convenient to informants.

I have been guided by Johnson's (1997) strategies for promoting qualitative research validity in developing the methodology for this research, such as low inference descriptors in the form of verbatim reporting, participant feedback, peer review, pattern matching, and researcher as detective technique. From my position as an integrated investigator, I drew upon participation in and my knowledge of the SCA to provide an equivalent to Johnson's extended fieldwork strategy. Data have been analyzed and presented, whenever possible, as low interference descriptors, through verbatim transcriptions to describe informants' narratives. Informants were solicited for feedback to maximize understanding and to allow for deeper development of response based on reflection. Similarly, critical reflection was an ongoing and conscious component of data collection and analysis in order to minimize researcher bias.

The alternate societal structure and the nature of SCA participation make comparisons to conventional social interaction and educational norms problematic. According to Denzin (1989) research would benefit from an interpretation based on

participant accounts and narratives. Understanding the unusual and unconventional SCA world and its place in participants' personal development requires the assistance of an interpretive researcher who, as Eisner (1991) suggests, in qualitative research is the instrument of understanding of "a situation that would otherwise be enigmatic or confusing" (p.58).

The selection of a qualitative methodology was chosen to allow informants to share their perspectives on the phenomenon of SCA learning. Through interview questions that probe for an understanding of informants' perception of their own and of others' SCA learning activities, informants described motivations for learning as well as the importance of that learning in their own lives. Informants were encouraged to expand upon responses in order to guide the interviews into unforeseen explorations of the SCA learning experience. The openness of the process to interpretations of SCA learning experiences that are beyond the assumptions of the researcher is in recognition of the complexity of participants' involvement, the diversity of individual participants, and the unstudied SCA learning environment.

The goal of this research is to develop an initial understanding of learning in a leisure society and how that compares to formal educational experiences. Informants were asked to explain how SCA based learning fulfills their requirements as a learner, who defines goals, objectives, and success, as compared to formal education, wherein professional educators develop and deliver curriculum and evaluate success. Why SCA participants engage in in-depth voluntary learning, in contrast to the difficulty of

similarly engaging students in formal education, may provide valuable insights overlooked within the traditional education paradigm. Understanding the nature of an interest in learning that is truly life-long, and that is not pursued for career advancement or monetary gain, may help educators to design structures that encourage and enable similar learning activities for individuals without an affiliation to a group such as the SCA.

The use of open-ended questions about informants' passionate involvement in learning projects allowed for a fuller explanation of the depth of involvement, informants' motivations for engaging in self-directed learning and lifelong learning, and whether informants' SCA learning has been experienced as transformative learning. Similarly, it is expected that creating an opportunity for informants to define leisure activities, through the lens of SCA participation, creates new interpretations of leisure through a more generalized approach to questioning that does not rely on a tightly worded quantitative survey format.

A quantitative methodology as an initial investigation would be premature and hindered by a lack of knowledge of the phenomenon of leisure group learning, particularly of SCA-based learning activities. A quantitative methodology requires a foundation of knowledge on which to base a line of questions from which a clearer picture may be established and a hypothesis tested. An initial quantitative methodology would be based on a speculative assessment of participant learning within the SCA and without the guidance that a qualitative methodology, through a phenomenological study,



would provide.

Selection and types of participation within each of the four themes, as well as deselection, were explored to determine the influence of perceived appropriateness to gender, role construction, age, and physical abilities. Evidence was sought of the presence of a life-cycle of learning types that may indicate a uniqueness of SCA learning experiences as compared to mundane learning expectations that are based on more formal situations and segregated by age. It was assumed that self-directed, lifelong, and transformative learning are not equally present within each of the four themes. The accessibility to historical research by informants based on formal educational experiences was assumed to enable a higher degree of self-directedness in learning. Similarly, martial skills, being absent from educational and societal experiences, were assumed to be less accessible to self-directed learning.

#### Limitations

There may be a tendency to overreport the motivational effect of the SCA by participants who wish to portray their involvement in the best possible light. There may be a reluctance to disclose situations of transformative learning if those situations may be perceived by participants as reflecting negatively on their current or previously held beliefs.

As an internal observer, I may hold biases that might influence my questions, interaction, and conclusions, though this has been mitigated through oversight of research process, and through the application for research with human subjects as required by the

Ethics Review Board (see Appendix A).

The SCA is a worldwide organization; however, the study will be concentrated on informants in the geographic area of Southern Ontario. The geographic proximity of participants might suggest a greater homogeneity of experiences, perceptions, and backgrounds than may be available with a more dispersed selection.

#### Data Collection and Analysis

The interview questions and structure were designed to determine to what extent and how participation in the SCA motivates learning and what sort of learning is achieved. Other motivations were analyzed to determine through responses a connection between informants' learning and their vocational situation. The effect of the SCA upon informants' motivations, as well as their sense of purpose, belonging, self-expression, and self-image, was explored as an ongoing narrative within the interviews. A larger picture of how the SCA social structure provides a motivation to learning was developed through individual informants' description of the narrative of their life as affected by involvement in the SCA, and, particularly, SCA-based learning activities. Similarly, evidence of transformative learning was sought through descriptions of the effect that SCA-based learning has had on informants' lives and perspectives. Questions were phrased to clarify how SCA learning experiences, whether designed learning activities or a function of SCA participation, have altered informants' perspectives and were presented at the time of a relevant response.

Brock University's Research Ethics Board was provided with the rationale for the

study as well as the method of informant selection, recruitment, and interviewing. Two informants, 1 male and 1 female, were selected in each of the four learning themes of historical research, artistic representation, performance, and martial skills, for interviews based upon their participation and achievement. One interview was conducted with each informant via telephone, digitally recorded, and transcribed by the interviewer.

Informants were provided with a copy of the transcript and a synopsis of the interviewer's impressions, on which they were asked to comment. Two informants returned comments one of whom corrected a misinterpretation by the researcher.

A systematic analysis of the interviews was conducted by the interviewer with the intent to identify the selected themes. Each interview was first annotated by the interviewer to identify the target themes, emerging patterns, and subtext. A synopsis of this interviewer interpretation was provided to each informant for comment and correction. Two informants provided corrections and clarifications to these interpretations. One set of printed interviews was coded for the three themes of self-directed learning, lifelong learning, and transformative learning. A second set of printed interviews was then coded for the four thematic categories of participation in historical research, artistic representation, performance, and martial skills.

Matrix charts, first comparing the learning themes to the interview questions, and second comparing participation themes to the interview questions, were then created as a visual aid in identifying similarities and differences in responses between informants, thematic participation category, and informant gender, as well as providing a visual

display of the richness of responses. Throughout this step, notes were made of words and phrases considered to have significant meaning in understanding informants' responses. These identified words and phrases were marked on the relevant printed interviews and emerging themes were identified.

The purpose of this study is to determine how self-directed learning, lifelong learning, and transformative learning are experienced in the SCA. This study considers self-directed learning, lifelong learning, and transformative learning to be components of the learning engaged in to support, or derived from, participation in historical research, artistic representation, performance, and martial skills within the SCA.

This study is designed as a phenomenological, descriptive, applied, qualitative, interview research study that will focus on participants' self-directed learning, lifelong learning, and transformative learning derived from, or inspired by, involvement in SCA activities.

## CHAPTER FOUR: PRESENTATION OF FINDINGS

The demographical information of informants interviewed for the study is described below. To preserve the anonymity of the informants they will be referred to by a coding that indicates the participation theme represented and their gender, as follows:

HRM: Historical research, male.

This informant is a professional, holding a doctorate in science, with almost 20 years of extensive SCA involvement who actively pursues various learning projects both within and without the SCA. He is approximately 40 years of age.

HRF: Historical research, female.

Holding a doctorate in history, this informant has almost 20 years of extensive SCA involvement. She is a professional working outside of academia. She has received two peerages, is an active mentor to others, actively pursues learning projects, and contributes written articles to SCA publications. She is approximately 40 years of age.

ARM: Artistic representation, male.

This informant is a degreed professional who has been extensively involved in most activities within the SCA for 20 years. He has received a peerage for his contributions to the SCA, acts as a mentor to others, and actively pursues independent research projects. He is approximately 40 years of age.

ARF: Artistic representation, female.

With over 30 years of extensive and intensive SCA involvement, this informant has acted in most roles within the society and in all types of activities. She has received two peerages, actively mentors others, conducts her own learning projects and contributes

written articles to SCA publications. This professional holds a doctorate in social sciences and is approximately 50 years of age.

PM: Performance, male.

This informant is a degreed professional who has been extensively involved in most activities within the SCA for 20 years. He has received a peerage for his contributions to the SCA, which includes performing at events, and acts as a mentor to others. He is approximately 40 years of age.

PF: Performance, female.

This informant is a degreed professional who has been extensively involved in performance activities within the SCA for almost 20 years. She has received a peerage for her contributions to the SCA, which includes performing at events, and acts as a mentor to others. She is approximately 35 years of age.

MSM: Martial skills, male.

This informant is a degreed SCA participant with 20 years of extensive and intensive SCA involvement. He has been knighted for his abilities and his involvement in training others. He is approximately 40 years of age.

MSF: Martial skills, female.

This informant is a degreed professional who has been extensively involved in most activities within the SCA for about 20 years. She has received a peerage for her contributions to the SCA, acts as a mentor to others, and actively pursues independent research projects. She is approximately 40 years of age.

### Research Questions

Informants were asked a series of questions designed to answer the four research questions. Selected responses have been included to frame the process and to provide a context for presenting findings. When asked, “How does participation in the SCA motivate individual participants to engage in self-directed learning, lifelong learning, and transformative learning activities?” participants responded: “It becomes a reason for shooting, a reason for making things, sort of an outlet for creativity.” (HRM)

There are some awfully obscure interests I have acquired within the SCA and there’s almost nowhere else in the world that I would turn around and find other people who are not only, vaguely interested in historical Scandinavian dance, but actively, droolingly want me to teach them how to do it. That’s a pretty unique crowd of people. (ARF)

“It’s such a broad scope of things that you can do within the organization. Pretty much anything goes, really. I mean there is the sports aspect, there’s the research, historical research, the opportunity for participating in service, really.” (MSF)

When asked, “Do participants have learning experiences beyond the enjoyment of leisure when they engage in activities as part of their SCA involvement?” participants responded:

I’ve had a couple of mine present at academic conferences. ... You know, when you see people like that who have the talent for that going and taking that initiative and doing that kind of research, regardless of what kind of piece of

paper they have to their name, and it's good research, and, you know, it just thrills me. (HRF)

"We like playing Lords and Ladies like people like playing cowboys and Indians. It's a good time, but, that said there is a serious educational side to club that we enjoy too."

(PM)

So, to go back to the dusty tomes and the actual things that were relevant to the very serious chroniclers in the 12<sup>th</sup> century isn't going to appeal to most people living 800 years later. The fact that we have the scope and the humour to be able to adapt those things so that they are still fun and interesting to people living in the 21<sup>st</sup> century is the reason that the SCA is the biggest historical recreationist or historical reenactment group in the world. (PF)

When asked, "Is the SCA is constructed to facilitate learning activities?" participants responded:

Most specifically I see the SCA as an opportunity for social interaction. That's my primary interest. It's a group of like minded interesting people and I find there's lots of folks all over the world that share common interests, many of them are educationally based and many them aren't. (PM)

"If they stick around long enough they'll be exposed to these things and start to generate hobbies in addition to just the fighting, even if it's just learning how to make chain mail so their armour looks better." (ARM)

I'm a Laurel and a Pelican, which means a lot of what you do when you take on



that responsibility is you become a mentor. And I've really enjoyed that aspect of it. I have people who are my students and I encourage them to take in responsibilities. All of the ones I have for the arts side are people who like to research. (HRF)

Participants were asked, "Are the self-directed learning, lifelong learning, and transformative learning activities, engaged in by participants in the SCA, different from experiences derived from formal learning processes?" and responded: "I probably would not get that within academia, because, although it's changing a little bit, there is much more interest now in what I would call practical studies of medieval culture." (HRF)

There are an awful lot of academics who have very firm ideas ... but who very obviously ... have never tried to put their theories into practice, 'cause they're flat out wrong. ... And once you've constructed a gown the way somebody's whose only looked at it in an archaeological museum has, and it just doesn't work, then you know that that theory is wrong and you've got to continue that research. (PF)

"You can do what you want to get into. You can find the people, if necessary to talk to about it. Or you can just reinvent the wheel for yourself, if you wish." (HRM)

### Learning Themes

In this study, SCA-based learning has been divided into three distinct themes, self-directed learning, lifelong learning, and transformative learning. These themes have meaning to educators, but were rarely referred to by informants as categories that defined their experiences.

### *Self-directed Learning*

All informants used strong terms of ownership to describe their learning effort. "So, to me, the function and the production was important. I didn't need the decoration" (HRM). "You're doing it because of the love of it." (HRF). "I was trying to narrow down a persona for myself and I decided that I wanted to be a Saxon from Norman England" (ARM). The personalization of informants' learning activities situated the learner at the centre of the learning effort, both in terms of initiation and motivation.

Informants expressed their preference for their SCA-based learning over formal learning because of the freedom of the learner to make decisions, such as choosing a course of action, choosing the depth of involvement, and being free of imposed standards.

It's a funny thing, but I tend to be a generalist with a few areas where I get very specific. I like a bigger view of people's lives. I'm not interested in just one thing... I like the details to be there to support it, but I'm much more a person who's interested in the overall look, rather than a nit-picky thing about a particular thing you do within the SCA. (HRF)

"...if they need to do research they'll go to the library do the research and start on it themselves" (ARM).

In some ways it's the fact that it's still open for you to do what you want, how you want, when you want, from the point of view of looking at projects that not everything has to be documentable...you can be doing things for the sheer fun of it. (HRM)

The value of SCA-based learning, described as conducted by amateurs or hobbyists, was compared favourably to more formal learning activities and instances of acceptance and recognition of the value of this learning by academics was noted by several informants.

There are an awful lot of academics who have very firm ideas, in my experience, on how certain elements in medieval life were lived, but who very obviously, from a reenactment standpoint, have never tried to put their theories into practice, because they're flat out wrong.... and once you've constructed a gown the way somebody who has only looked at it in an archaeological museum has, and it just doesn't work, then you know that that theory is wrong and you've got to continue that research.. (it is a) challenge to the information that's out there. (PF)

I took up (my craft) within the SCA, because of that I am now part of a group of (crafters) across the world. Last spring I was a guest speaker at spinners and weavers conference... it was an exhibit of Ontario artisans. (ARM)

"I've had a couple of (my SCA students) present at academic conferences... they're doing high level research...regardless of what kind of piece of paper they have to their name, it's good research and it just thrills me" (HRF).

Informants described accessing multiple sources of information during their learning processes, including written documents, subject matter experts, examination of period artifacts, and non-traditional resources such as experimental archaeology. "I'm always interested in finding references to clothing in various Latin documents and finding

out what they said and how that compares to what I see in statues or illuminated manuscripts, or actual archaeological finds” (HRF).

How do you find that research, unless you find you can find a group of people where you can drop onto the internet of the local forum of the SCA Housewives Guild, or whatever you want to call it and say, ‘I’ve been looking for... how did they swaddle their children,’ I mean it’s not going to be in the grand Kings of England, but certainly that research is out there and people like this are looking for it. (PF)

“I’ve planned trips to Scotland in order to see places my persona would have been and gone and studied deeply at various universities and museums around the world to find artifacts that I would have been familiar with” (PM).

Experimental archaeology, as a resource, was referred to by most informants, either directly or by describing the process. “I have a great fascination for what we refer to, not just in the SCA, but we use the term a lot, experimental archaeology” (ARF).

“What I find interesting is using the period techniques and, of course, I have to experiment with those at home” (MAF). “It was getting to it and working out, well why did they do it this way? What purpose did this bit serve?” (HRM).

Access to resources, whether subject matter experts, opportunities for experimental archaeology, specific and esoteric classes, and mentoring opportunities was frequently cited as both a motivator and a benefit to participation. “So whenever I am interested in expanding the horizons and doing something new, there’s always people to

talk to about it” (HRF).

we had all these people sitting around with all this knowledge...getting them together in one place created a real synergy and suddenly I found out about more things that I didn't know about and then started making relationship interests educationally or academically... you can really see the growth patterns. (PM)

There are some wonderfully obscure interests I have acquired within the SCA and there's almost nowhere else in the world that I would turn around and find other people who are not only vaguely interested in historical Scandinavian dance, but actively, droolingly want to teach me how to do it. (ARF)

Learning activities were mostly described as being engaged in support of activities, wherein the learning sought and achieved was utilized to determine a course of action, provide context to an activity, or to ensure authenticity of artifacts or behaviour.

So it's looking at not just authenticity, filling the gap of how we do this. What matters is getting to a very in-depth understanding of the process in order to understand the finds, in order to understand the culture, in order to understand just how to work. (HRM)

The thing about the arts and sciences is that it's something that you do in your house, or in your basement, or in your shop and then you take your results to the event, as opposed to fighting, where you practice at home and then do your results at the event. (MAF)

We all sort of spent 6 or 8 months before we ever went to our first SCA event,

trying to figure out how to get together our personas and what we all had to do in the building of our costume trying to be very, I would say, accurate about it. (PM)

There was no differentiation of learning from artifact production or activity participation; instead, this process was conceptualized as contained projects that could also be linked to other projects or a part of a linear progression of knowledge and involvement.

It is basically a hobby that breeds hobbies...I can't find really good buttons for my outfit, let's see, how would I make some buttons?... alright you can do cast buttons; you can get into pewter work; you can do knotted buttons... there are more ways in which observations you make will lead you into other hobbies.

(ARM)

Anything related to music and/or words. So I write, I compose, I perform, I research historical music and through that I got into historical dance, and Norse dance... Yep, I got into the strangest things through trying to backdate things.

(ARF)

Then you start thinking - OK who do I know in the SCA who does research into food and drink. OK. And then, going from there, and they might know somebody who knows something and it's going to people first and the people will eventually point you toward sources, but you're talking to people who have done the things, rather than just looking them up in a book. (HRF)

The progression of knowledge acquisition was described as moving from the

general to the specific and developing in a course chosen by participants based on personal inclination, exposure to opportunities, or as part of a theme within the medieval milieu connected to persona development or related skill set development.

I think that most people start off with a general knowledge and they glom onto something and they get very specific from there. Most people start big and get smaller. You don't get people who come in who are already fascinated by, say, medieval medical devices and then gradually learn about the rest of the middle ages. It's the other way around. (HRF)

The persona I built for myself was more to exemplify what I was already doing, so I had got into the SCA through archery, that's why English was the background I picked, the English longbowman. I was doing research into leather work and weaving and stuff like that. That's why I wanted to come from an educated background. (ARM)

My initial persona idea was the whole Braveheart thing... So I immediately set my persona and therefore some of my initial research in the SCA in that period of time.... So the vast majority of my actual research that I can lay at the foot of my involvement in the SCA, has been based on legends and folktales... but I don't confine it to that particular historical era. I'm interested in the legends right from the fifth century right up to the end of the SCA period. (PF)

The structure of the SCA as a learning environment was mentioned frequently by all informants. With no physical structure or prescribed course of learning, informants

contextualized the learning environment in terms of opportunity.

So it provides not the structure to do it, it provides the freedom to do it, it provides the venue. So a place a time and others who might be interested for you to develop what you like to do. (HRM);

“I think that it helps a lot of people to explore skill sets that they wouldn’t otherwise have ha a chance to” (MAF). “So, whenever I am interested in expanding the horizons and doing something new, there’s always someone to go and talk to about it” (HRF).

Although SCA participants might seek out mentors to advise and guide their learning, informants described undertaking new projects as natural progressions of their current interests or new interests that resulted from exposure to activities, information, or newly discovered questions. Informants’ descriptions were phrased in terms of initiative and persistence.

I’m making things for next year, planning things...I rarely set a deadline for when I want to do something. ...So you go through a long cycle of learning things which you don’t apply yet, buying things which you don’t know how to use yet, and you finally put it all together and try to make something. (HRM)

So there’s a certain amount of personal training that you have to do...at practice where I’ll do one on one fighting with others. Some of them above my skill level and some of them below.... And then if I have issues, you know, I’m struggling with a particular shot, or I’m not having much success learning polearm, or something, then when I’m at an event and I see someone who can answer the



question, I'll say I'm having trouble with this, would you help me? (MAF)

Well there are a number of people who are very, very strong researchers who are able to put all that into practice in the context of the SCA and so it ends up being that those people are a walking talking resource of say Roumanian culture in the 14<sup>th</sup> century... and those people their research is just as, well, it is more detailed and more broad even than some of the things that I look at. But they are so specifically tied to that historical persona, I think what drives them in their research is their desire to become what that person, what their persona could have been. What they would have known, how they would have dressed, what they would have eaten, the people and the social interactions they would have had, they are trying to make that the most authentic game that they can play. (PF)

### *Lifelong Learning*

Most informants described the ongoing nature of their learning as moving from activity to activity, or interest to interest, and described, positively, the connection of this progression to the exposure they received to different opportunities within the SCA.

The longer I've been in the club the interested I've been in the serious history side of it... The educational side grew on me. As I got better at things I started to enjoy them more because there was a certain amount of satisfaction and expertise... I've learned things about my interest areas that I didn't know because it gave me an outlet for discourse on the subject. (PM)

I picked a period that isn't particularly known for costuming. I picked it mostly

because of the history. In my subsequent studies I have ended up studying the 12<sup>th</sup> century as well as the 13<sup>th</sup> century, partially because I like the clothing. (HRF); I've recently tried my hand at some things I had never tried before. I made my first pewter cast recently, tried my hand at a little bit of lamp-work and made a half-dozen beads. I have been addicted for years. I want to get the equipment. I want to play. I want to learn how to do it and not singe my arm hairs. (ARF)

Frequently cited as a motivator and a facilitating influence in their pursuit of new learning opportunities was the availability and accessibility of subject matter experts and the mentorship structure of the SCA. Most informants have been awarded peerages for their accomplishments and several commented on the expectation of peers to act as a mentor or teacher to other participants and to act as a resource for others' learning experiences. All informants described themselves as mentors involved in teaching other participants actively through personal and/or classroom instruction and all describe this role as one assumed by their own inclination and/or bestowed upon them through their status and role as a peer.

I'm a Laurel and a Pelican, which means a lot of what you do when you take on that responsibility is you become a mentor, and I've really enjoyed that aspect of it. I have people who are my students and I encourage them to take on responsibilities. All of the ones I have on the arts side are people who like to do research. (HRF)

"I'll try and introduce them to maybe research that they haven't looked at before, a new

perspective on an idea” (ARF).

“I can say... with a fair bit of honesty that I have been one of the key trainers of a lot of the top fighters in the kingdom” (MAM).

Traditional lifelong learning terminology of upgrading, skill maintenance, qualification, and certification, was absent. Informants, however, did use terms, such as career, to describe their own and others’ construction of their SCA experience. “I definitely put some aspects of my SCA career ahead of my real career for quite a while” (MAM). “It may be that in someone’s 15 year career or time in the SCA, they contribute one little discovery, and it might be a discovery that is important enough for the academic world to take notice” (PF).

Oh yes. Come on, I have never, not been an officer. Since the second time I joined I have had an officer role of some kind. I’m a Society officer now. At one point I was probably doing 40 plus events a year. I’m certainly... you know I travel thousands of miles to go to events in other kingdoms, yeah, absolutely, I’m a lifer. There’s no doubt about it. (PM)

Such descriptions of the length of informants’ involvement, highlighted by the depth and breadth of their activities, were frequently provided in positive terms of pride, accomplishment, and effort.

You know, I’ve held offices from the local all the way to the kingdom level and I think that, if you’re not very fringe, at some level, you know, you do that, in whatever office. You know, tied into what you love doing, whether that’s arts and

sciences or seneschal or whatever. I don't think that my experience is that dissimilar. I think that just the number of years in means that I have a slightly different take on it. (ARF)

I started out running newsletters, and I started out at the lowest level in my local group because I liked writing and doing things like that and gradually over a period of, what, about 12 years I wound up all the way through editing the SCA's international magazine and, also, being, just after that, supervising all the people who do all the kingdom newsletters. (HRF)

### *Transformative Learning*

All informants reported instances of perspective transformation occurring because of SCA participation related to SCA social interaction, experience, or observation.

I mean, (my persona) is definitely like a role that I would play. I even think that way when I'm performing to be honest, that it is sort of a different character and that's what this guy does rather than thinking of it as me as much....So, it's affected my personal life in quite a dramatic way, I would say. (PM)

The fact that I fit in and there's so many people there who I fit in with. Whose interests and personalities matched with me and there are people there who represented who I wanted to be, how I perceived myself down the road. (ARM)

"If I hadn't discovered the SCA, or if the SCA didn't exist, where could I express and enjoy that part of myself in modern society?" (PF).

The most common contextualization of these experiences relied on contrasting

SCA behaviour with mundane behaviour and centred around the theme of expectation and acceptance. These themes were generally given positive descriptions, but also ranged from terms of neutral acceptance to the introduction of negative behaviours. “Polyamory and paganism, there’s many, many sets of subcultures that are anywhere between tolerated and embraced depending on where in the SCA you are” (ARF).

We’re all completely offended if someone is robbed or attacked...it couldn’t be on of us, an outsider had to have been involved... Whether or not it’s true, there’s the belief that we’re a special group of individuals who are honourable and not prone to things of that nature. (ARM)

Because it’s all inclusive open nature accepts a lot, but at the same time does not put an onus on getting it right, getting it done well. So you can end up with some really bad garb, some really bad ideas, some really flaky personas. So you end up thinking, not in my SCA, not in my middle ages. (HRM)

Gender roles within the SCA received frequent comment and comparison with the mundane world. The context of comparison described the SCA environment as more accepting engagement in nontraditional activities by both men and women, although with more emphasis on the opportunities for women to escape mundane imposed restrictions. There was acknowledgement that mundane gender expectations exist in the SCA, but informants mitigated the level of imposed restrictions experienced within the SCA. Historical gender roles were acknowledged as being present as underlying expectations, but not expected to be enforced within the current middle ages.

A woman, if she were a talented enough combatant could be a ruler. There is no reason for her not to be. A man can be the dance master of his local group. No one looks down on you for being a tablet weaver, if you're a man... with all of the basically housewife skills, I mean all of the spinning, carding and all of those things which in the medieval society would have been exclusively the prevue of females. (PF)

If anything we allow a certain amount of bending of traditional gender roles. The first time I saw a great big strapping, tattooed, kilted Canadian Forces Regular Member, bald, sitting in a corner doing embroidery, my brain almost shorted out. (ARF)

"We have no gender expectation or age expectations of what you of can or cannot do. So as far as that goes, yes, we don't tend to critique as much as the average individual" (ARM).

While no informant subscribed to the dream metaphor as a facilitator for shifting perspective, all acknowledged that other participants did pursue the dream and described those individuals in terms of exercising personal choice in defining their own SCA experience. The acceptance and expectation of individual choice in choosing the construction of participants' SCA experience was described as providing a richness to others' experiences. "Yeah some people are really big on dreams, and especially the ones who get that magical feeling. It does happen you can get that disconnect from reality" (ARM).

There is no one monolithic the dream. There are dozens of dreams. And for some people the SCA is a cool glorified sport. For others it's a place where they can be artistic pedants and for others it's like a cool dress up party and for others they get to focus in on one or two hobbies that they're passionate about. And so I think the SCA works best when a large number of those, the lower case, the dreams, are all running in sequence and they braid instead of running in parallel. (ARF)

I think it's an aspect of it for some people and partly for me, but I don't think it's required for everybody. Dreaming is something you intrinsically do on your own, right? Everyone's dream is different, so I hesitate to try to define the dream.

(MAM)

All informants described contextualizing SCA experiences through the use of a created persona as a gateway to understanding the perspective of medieval individuals. The use of a created persona situated the experience as a valuable learning technique and an important developmental tool in advancing an individual's desire to both learn and to provide a greater contribution to the group.

But they are so specifically tied to that historical persona, I think what drives them in their research is their desire to become what that person, what their persona could have been. What they would have known, how they would have dressed, what they would have eaten, the people and the social interactions they would have had, they are trying to make that the most authentic game that they can play. (PF)

Yeah. It's a focus for study. I'm always interested in finding out - if I was alive in the middle ages and I were (my persona), what would my life be like. What would I wear, what would I eat, where would I live, what would my daily life be like.

(HRF)

If you are doing your academic pursuit into the culture as opposed to doing it into crafts, then you're much more likely to develop it as part of your persona, your research becomes part of you. As you strive to bring out more authenticity into how you perceive yourself, because we don't like looking at flaws, even if they are flaws in perception. (ARM)

The attempt to create a medieval atmosphere was frequently described in diminishing terms such as weird, freaks, and funny clothes. Such terms were used as descriptors of the physical separation of the SCA from the mundane world and as a method of facilitating a different environment from which alternate understanding could be drawn.

I mean, we are the people who don't feel embarrassed at all to dress up in funny costumes and go and do things that seem weird to other society, because those are things that we all our lives have enjoyed doing and it's nice to have an outlet for that in the adult world. So, for those people I think that that combined with a personality trait for wanting to make it the most authentic that they can - it gives them, the persona that they take the opportunity to play that game. (PF)

Whenever I was in persona, in the old days, I didn't look too much at (myself)



and whether (I) was successful or not successful. Very much in the moment, so if I'm wearing the funny clothes, then I'm, you know, (my persona) and then you get into the blue jeans and tee shirt afterwards and I'm just (me), and that was... So, you know, when I was in the funny clothes being (my persona), I didn't think a lot about Oh damn, tomorrow I have to write this paper, or something. It is somewhat stand alone realities, in some ways, I guess. (ARF)

I joined the SCA, not because I was doing a doctorate in history, but because I like to dress up and wear costumes. In a way, that's very similar to most people. They come in because there's something about it that catches their imagination. For me it was a combination of the history plus the clothing and the creative side. (HRF)

### Participation Themes

Four themes of participation: (a) historical research, (b) artistic representation, (c) performance, and (d) martial skills, were identified for their importance in the SCA experience.

#### *Historical Research*

Descriptions of informants' historical research were the most frequently referenced participation theme and phrased as a matter of course activity. "I do the research and then I write up my findings" (ARF). "do your own research and then address the problem" (PF). "I was doing research into leather work and weaving and stuff like that" (ARM). All informants reported conducting historical research for various reasons;

however, the most frequently described reason for conducting historical research was the creation of their SCA persona and creation or acquisition of their garb. “We spent a lot of time and energy researching the history of our personas and where they would be from and how they would interconnect and all the things that would likely be part of their world” (PM).

So I immediately set my persona and therefore some of my initial research in the SCA in that period of time. I did a couple of projects on it in university, and that sort of thing and it really guided me into that era, that Edward the 1<sup>st</sup> kind of era, just simply because of the name that I had chosen for other reasons. (PF)

I chose the name... it's based on an amalgam of two historical figures that I found interesting. One of them was...(name removed) the Seneschal of Lincoln castle when the French invaded England in 1217. She organized the defences, so she was this lady who was out there telling soldiers what to do, which was kind of cool. And the other one was a jurist, (name removed), one of the first codifiers of Medieval English common law. So I picked two figures that were kind of interesting for the 13<sup>th</sup> century... I've always been interested in law, I've always been interested in women , so it seemed like a good combination. (HRF)

Multiple types and levels of historical research were described as being undertaken by informants and other participants. The selection of the type of research engaged and the depth of inquiry undertaken reflected the personal desires and goals of individuals.

Then you start thinking - OK who do I know in the SCA who does research into food and drink. OK. And then, going from there, and they might know somebody who knows something and it's going to people first and the people will eventually point you toward sources. (HRF)

Well first of all it depends on what the academic pursuit is. If you are doing your academic pursuit into the culture as opposed to doing it into crafts, then you're much more likely to develop it as part of your persona, your research becomes part of you. As you strive to bring out more authenticity into how you perceive yourself, because we don't like looking at flaws, even if they are flaws in perception. (ARM)

In some ways it's the fact that it's still open for you to do what you want, how you want, where you want, when you want, from the point of view of looking at different projects that it's not everything has to be documentable on show to a high degree. You can be doing things for the sheer fun of it. I do a lot of shooting.

It is not necessary to have totally period stuff when you are shooting. (HRM)

### *Artistic Representation*

Most informants described the practice of creating artifacts that fit a function and had a convincing period appearance. Informants placed the importance of this activity in the research conducted and in the effort expended in creation of artifacts. The value of artifacts, including garb, was placed in enabling participation in the SCA and the creation of a medieval period environment.

So, to me, the function and the production was important. It was getting to it and working out, well why did they do it this way? ... It's applying the 30 foot rule... if it's that far away it looks right. (HRM);

"[My persona] was in the historical record from about 920. No, I don't follow it much. A little bit of costuming, but a lot of what I have is what we call SCA generic" (MAF).

You can make costumes for ice-skaters, you can make costumes for Halloween.

The SCA gives you an opening to make costumes where they are not just things that have a zipper up the back and you wear them for a week, once a week, or 18 shows or something. (ARF)

One informant described much latitude in the acceptance of attempts to recreate artifacts to fit within the broad period covered. "One of the tenets of the SCA really is you can put in as much as you want as long so you satisfy the minimum basics of an attempt at pre 17<sup>th</sup> century garb" (HRM). Similarly, individual interpretation, based on personality or constructed persona was described as a motivator in artifact production. "They will pick a persona that fits the mood that they're in. So they might have garb from different eras, different countries" (ARM). "In my subsequent studies I have ended up studying the 12<sup>th</sup> century as well as the 13<sup>th</sup> century, and partially because I like the clothing" (HRF).

Before we ever went to our first SCA event, trying to figure how to get together our personas and what we all had to do in building our costume and trying to be very, I would say relatively accurate about all of it. (PM)

Adherence to period form and construction techniques was referred to as preferable and described as the goal of all informants, but acknowledged as not always attainable. Although greater value was given to authentic artifacts and techniques, a pragmatic viewpoint was described by all informants as necessary in order to maximize their enjoyment of participating in view of mundane, financial, and time constraints.

I was one of the first people to make period or semi-period footwear in Ealdormere. I've stopped doing it because there are a couple of people who produce stuff in India and it's now cheaper to do it that way because it takes me about a week of labour to make a pair of boots. You can never make your money back. (MAM)

So what I did was I bought some equipment and I've been making glass beads at school on my Bunsen burner. Now that's something where it's definitely separate at the moment. Now I've given the beads I've made to SCA people, but what I'm doing isn't period anymore. (ARM)

So it ends up with, in that respect, a social... a social component of it within... and then shooting creatively within what is a reasonably period style competition. The targets themselves are not made of period things and there's a whole mass of stuff we have to overlook, but you can try to encourage people to do it in a more period style, but it's still fun, it's still worth doing. (HRM)

One informant described the over-emphasis on decoration in arts and sciences competitions.

For a lot of the SCA stuff, for want of a better word, the process is not as important as the product. I know that, for the longest time, when I was making things for the SCA I kept on being told that you need to do more decoration, because if you entering it into a competition for comment then there's points for what you used, points for what you made and for what you've written about it, and points for how pretty it looks. Yeah. This is certainly the way a lot of the judges used to look at it and it was the case that I'd lose points because I didn't decorate. Well, I didn't need to decorate it, because it was functional. (HRM)

Two informants described their involvement with heraldry as consultants for other participants, although no informant referred to heraldry creation or in connection to a persona.

I've been a stealth herald. I'm not an active member of the College and I'm not like the herald of a group and I haven't been for a couple of decades. But I still, periodically advise on somebody's name or coat of arms or something like that. (ARF)

"And I am Herald now. I kind of have started doing heraldry on the side about ten years ago, because I was interested in medieval ceremonial, mostly" (HRF).

### *Performance*

The most frequent reference to performance appeared in informants' descriptions of SCA participation as assuming a role within a setting different than their mundane life.

I mean (my persona) is definitely like a role that I would play. I even think of it

that way when I'm performing to be honest, that it is sort of a different character and that's what this guy does rather than thinking of it as me as much. (PM)

[My persona] the SCA persona, and I think that in the psychological meaning rather than the SCA terminology, the psychological persona of (my persona) was talented and effervescent and successful. She became a Laurel, she became a Baroness, big titles. (ARF);

Most women, in my experience, that I've met, a lot of the appeal of the SCA is that they get to be feminine. They get to dress up in beautiful, very feminine clothes and be graceful and not have to be tough and strong and defending her opinions in the boardroom. They are able to be ladylike. (PF)

Despite the use of a third person description of assumed personas, most informants denied their participation as assuming a role or persona with a personality that was different from their own.

I am not as interested in taking on a role at an SCA event, I am more interested in contributing to an SCA event as myself by providing entertaining and cultural passing on of knowledge within the society of Ealdormere rather than say Scottish or French society. (PF)

"Do I behave differently as [my persona] than I do as [myself], no" (MAF).

For myself, my persona was never separate. My persona was just me in a funny costume... I've never bothered trying to define which was mundane, which was me. It's just me...to be perfectly honest with you for some people it's a valid line,

but for other people its artificial. It really depends on the individual. (ARM)

One informant described SCA events as opportunities to explore behaviours through role playing that contrasted with mundane experiences.

I mean there's not an awful lot of scope for daring do and romance in normal life, so getting a chance to step out of that into a club where those things are actually engaged in, on a regular basis... you can bow to the next person, you can lightly flirt with someone and have it taken well, you can engage in sports where chivalry and good grace is honoured, not just appreciated, but actually honoured in front of your peers. That is absolutely something that I think is missing in most people's lives in the modern day. (PF)

Another informant described the limitations of playing a true role because of mundane constraints being imposed on SCA behaviour.

It's difficult for it to be truly an alter ego. It's difficult to truly work within a different persona. Because some aspects of a different persona are necessarily the ones that are neither politically correct or desirable. So that if I were to play out a 14<sup>th</sup> century persona well, there would be large amounts of Xenophobia in there...

I find it hard to act in a persona, accurate, when a lot of the aspects of a persona have been removed from you. You can't be overtly religious within the SCA.

(HRM)

All informants commented on the significance of particular events, particularly feasts, bardic circles, and ceremonies as opportunities to perform, or instances of shared



performance. The contextualizing of these activities within events as separate opportunities to perform defines these activities as scenes within an event that exist through mutual understanding of the place and function of performance. These scenes allow for a focused activity that has an expected pro-forma in which participants can find a role in which they feel comfortable performing, or can attend as observers.

I think it's either court or bardic circles that draw people together. But the thing that makes the sports part and the artisan part hang together; yeah, I would say, to a large extent is the feast and then court afterwards. (HRF)

It's more about the desire to have the social event of the song rather than the content of the song... taken by audience and by the performer as 'we want to do this social thing' which is share music in a social setting. It ceases to be important what you do as long as it isn't blatantly intrusive into the medieval mood that it breaks everyone out of their sense of romance and fantasy. (PF)

I'm a performer and an organizer. I've autocrated dozens of event and that's not really a persona related activity, but it's certainly one of the things I like to think of myself as. As somebody who's done an awful lot of create of stuff to try to create more opportunities for other folks to enjoy the group. (PM)

Descriptions of performance as an offering by an individual or group was made by the 2 informants selected for their roles in performance.

"I would say that on a direct level I suppose I am a musician and on an indirect level I think of myself as someone who creates atmosphere for the group. In a variety of ways"

(PM). "As a musician and particularly as a song writing musician, I have been able to use my talents to capture and amplify, for other people, the best parts of the society" (PF).

In both cases these informants contextualized this type of performance as an SCA role that they had assumed.

I've always wanted to be a bard, originally, in the SCA and so for me my kind of using it as an alter ego to perform has been useful I suppose. It gave me a focus for my writing and the poetry I was doing and all that sort of stuff, so yeah I guess it's sort of a role, but I don't know that I think of it specifically as an alter ego. It's just sort of a different aspect of me I let come forward at that point. (PM)

[My persona] is known, I think, throughout the Society more as a bard of the society, than, you know a particular person in a particular time frame... and that's really the world that I live in when I am playing within the SCA. (PF)

### *Martial Skills*

All informants who commented on martial skills described accessibility, regardless of size, fitness, age, or gender, in positive terms. The contextualizing of fighting as accessible was phrased as an encouragement to participation by members.

Well, barring physical handicaps of course. You have to be able to walk, although there are guys who have authorized in wheelchairs. There is a guy who got knighted after losing a leg, no leg below the knee. There are examples of people who have come back from, or have been able to participate, sometimes at a high level, despite catastrophic injury. For the most part, the limitations are purely

personal. (MAM)

You know, if you come out and you make an honest effort and you don't complain. We're not big in whiners. And you'll have a certain degree of respect for that. Now, skill on the field gives you a level of respect above that. So there's two aspects here, your attitude and your physical skill levels. (MAF)

I'm going to see if my body at almost 52 will actually take it... if a 51 year old woman taking up fighting for the first time can't inspire the troops, I don't bloody know what will... yeah, it doesn't mean you'll be great at it, but as long as you're having fun, who else cares? (ARF)

Both informants selected for martial skill achievement described the development of skill and physical ability as the goal of training and mentorship, but also described participation in martial activities in positive terms of enjoyment and belonging. "I do a lot of travelling to a lot of foreign wars in other kingdoms. I actually have a fairly wide network of other fighters throughout North America. I have travelled a bit and fought all over the place" (MAM).

I get a certain feeling of accomplishment and a job well done. If I fight well in a tournament, if I make something new, or if I can teach it to somebody else. Every now and again, certainly in the fighting, I'll get some newby who is having trouble learning something, and I'll say try it like this and a little light comes on and they say 'Oh I understand, thank you so much' And that is worth so much to me. (MAF)

The inclusion of participants of all skill levels was referred to as a positive aspect of this activity and with the encouragement to participate mentioned above, described a desire to develop a sense of belonging through shared experiences.

So it's physically difficult for you to participate when there's such a huge size difference. But we have no intention of going to weight classes, or gender classes, or size classes, like some other sports do, or as, actually, most sports do. We take a certain degree of pride in that everybody participates on an equal field, but we also acknowledge that it's not all that equal a field. (MAF)

"I think the flip side of that demographic, the pencil necked, D&D players and the overweight ones show and say, hey, here's something I can learn and it's just like my character" (MAM).

Martial skills encompass all martial activities and include fencing, archery, and thrown weapons, but has a particular subset referred to as fighters who engage in heavy combat. It is within this subset that the martial skill informants commented on training and mentorship. Non-heavy combat martial skills were not addressed by any informant in terms of SCA training, mentoring, or teaching.

I, essentially, restarted that fighting group from scratch on more than one occasion in bringing in new fighters, getting new people authorized. I can vainly say, or say in all vanity, but with a fair bit of honesty that I have one of the key trainers of a lot of the top fighters in the kingdom. (MAM)

"What I find is that women are, they're not discouraged to participate. I mean the guys

will train them, for the most part. And if they don't, it's my job to make sure that they do" (MAF).

### Emerging Themes

The analysis of the data identified social interaction and the sheltered society of the SCA as two additional and important themes of participants' SCA experience.

#### *Social Interaction*

All informants described their greatest motivator to participate in positive terms related to social interaction, such as friendship, camaraderie, and family. "I've met a whole group of people that I wouldn't have met otherwise, and they, in themselves, have enriched my life in many ways" (MAF). "Like a lot of people who have been in the SCA for a long time, the majority of my friends now are SCA people... just because of that kind of commitment of time" (MAM). "I would say that I've made friends, that's my primary benefit" (PM). The family metaphor was referred to explicitly by 3 informants and used as both a descriptor of an experience of personal interaction and more generally as a descriptor of the SCA community.

I got an email from [an SCA friend] the other day that basically said 'I miss my family', that she sent around to a bunch of us that she hadn't seen for a while.

There is very much that, when you go to events it's a comfort thing. I have a really strong group of people who are very important to me. (ARM)

"Yeah, and that fact that I am in the SCA is almost a carte blanche, people just open their homes to us, because we are part of this family, this community, so there is that trust

there” (PF).

Oh yeah. I’ve gone to conferences in England as an academic, where I’ve added a few days to my trip and stayed in the home of SCA people. You know, people I’d never met. You have kind of like an insta-family, practically anywhere in the world. (ARF)

Positive behavioural descriptors, such as trust, honour, and chivalry, were used by all informants in describing expected and experienced SCA interactions and transgressions were described in terms of disapprobation. Behaviours selected for description were often compared with negative mundane behaviours and experiences.

If you are not a good person, or if you don’t, fundamentally behave according to the agreed upon virtues, which tend to be based on medieval virtues, roughly. You don’t find it as welcoming a place and most people usually leave, and that does happen. (PF)

There are people who definitely suck up to the Crown. There will always be suck ups. But a lot of those people, once they get the recognition, if there’s no where higher for them to go, they drop out. It’s very obvious, and it’s like, oh good they’re gone. (ARM)

What I do is, if they are completely full of hooey, I’ll be very polite and say something like: Actually, you know, I looked into that a while ago and the information I found was more like da-da da-da da-da. (ARF)

The existence of the SCA as a created society was often commented upon using

terms indicating ownership, choice, and a sense of community. All informants described entry requirements into the SCA as a threshold commitment of self-selection.

But you've all bought into it, so that gives you a brotherhood that you wouldn't otherwise have, it gives you a bond that you wouldn't otherwise have. We have all shown up at an event wearing a costume that would have gotten us laughed out of our workplaces. We have all chosen to do that gives us a bond, more than anything else I think. I think if we didn't have the whole garb element to the SCA play I don't think it would this close a community, but we've all bought into this visual, a very real concession. We all do it, and so the people who wouldn't be willing to do that are not part of the group. So there is a trust in that you've gone through something you've been vetted in order to be part of the group, in some sort of way. Not by a higher authority, but by your willingness to cooperate and be good people. (PF)

We had spent a lot of time and energy researching the history of our personas and where they would be from and how they would interconnect and all the things that would be likely to be part of their world and to be honest we were all role playing game folks and so we were just thinking that this was part of how you did this game... I guess of what it's done for me over the years is that I had a real interest, initially and always sort of stayed with, this idea that it was a place for me to kind of call home. (PM)

Part of it's the interaction with people who are doing more with their lives than

just going to work, coming home, sitting in front of the TV, playing a video game, or whatever. The People I find in the SCA are people who tend to be... people who value the fact that having a creative mind is a good thing and doing something that's not just very conventional is just a good thing... who like to learn, they like to try new things. They tend to be creative people... with so many different interests that broaden your own mind and you keep coming back for yourself, because there are other nifty people to talk to. (HRF)

One informant referred to the process as a buy-in and similar to a hazing ritual, others similarly described collectively wearing funny clothes as a bonding element.

We all go through, not a hazing ritual, I mean the reason fraternities do hazing is so that you've gone through something, you've all bought into an activity that would seem inappropriate in the wider context. But you've all bought into it, so that gives you a brotherhood that you wouldn't otherwise have, it gives you a bond that you wouldn't otherwise have. (PF)

### *Sheltered Society*

All informants described the SCA as offering a shelter or protection for their activities and interactions from mundane expectations and values.

It's nice to be within a comfortable group where you can fall back on another side of your personality and not have it be taken advantage of, or feel that you're giving up respect, just because you want to indulge in being feminine... It's a way to express that in an environment where you're not going to be taken advantage



of. (PF)

My whole world is about escapism to some degree. I produce theatre for a living and my hobbies are all escapist oriented, role playing games and the SCA, the occasional LARP and weird long, strange European vacations. So I have a tendency to think of myself professionally that way. I suppose it's a refuge, but its one of a number of them I suppose. (PM)

I warned him something that I experienced after my first really big event. I said, just keep in mind when you go back home at the end of this. You're going to have a little culture shock, and that's OK...so perhaps short tempered or intolerant with what you're going to find is dumb people, or non-honourable people. And just remember that this is a very special little corner of the universe you're in right now. And it's going to just underline how miserable the real boring, mundane world can be at times. (ARF)

The most commonly referred to activity requiring shelter was in costuming. "I can run around in funny clothes and nobody says boo" (MAF). "It allows... comfortable sort of comraderie, that you wouldn't get if you were doing it in say a demo format, where the public is there and you constantly have to explain why you're wearing weird clothes" (PF). "I joined the SCA, not because I was doing a doctorate in history, but because I like to dress up and wear costumes" (HRF).

The protection of ideals associated with the medieval period, referred to as the current middle ages, was also described as requiring protection from mundane realities.

One informant described the SCA as providing a protective and accepting environment for behaviours seen as subversive within the mundane world, such as sexual orientation and practice.

It's really a pretty safe enclave compared to the mundane world. And I've had a number of my gay and lesbian friends say that to me... The BDSM communities within the SCA that, so, don't exist in the outside world. You know you need to be very networked. And polyamory and paganism, there's many, many sets of subcultures that are anywhere between tolerated and embraced depending in where in the SCA you are. (ARF)

Six informants described the positive effect of the shelter of the SCA in affording a greater self-image to participants, though some described those individuals as not necessarily benefiting in their mundane life from their SCA based success.

I've seen people come into the organization who are, for example, very shy, and they come out and they learn a skill, for example, and they get good at that, and then they get recognition and some feedback and positive feedback and they become a little less shy. (MAF)

"I think the flip side of that demographic, the pencil necked, D&D players and the overweight ones show and say, hey, here's something I can learn and it's just like my character" (MAM).

They wore jeans and tee shirts like the rest of us. But they had found this group of people that they could interact with as a king and queen, as a nobleman, as a ... as

any of the personas of the people that they had and it obviously had meaning for them. It wasn't just we're weren't laughing this off as a big lark. This actually had meaning, for them and all the people they were interacting with. (PF)

## CHAPTER FIVE: SUMMARY, DISCUSSIONS, AND IMPLICATIONS

This study has been undertaken to better understand the relationship between SCA participation and self-directed, lifelong, and transformative learning. The willingness to learn and the enthusiasm displayed by SCA participants in learning and sharing their learning is intriguing for educators who face obstacles in motivating learning and in developing an attitude and environment of lifelong learning.

This phenomenological, descriptive, applied, qualitative, interview-based research study focuses on participants' self-directed learning, lifelong learning, and transformative learning derived from, or inspired by, involvement in SCA activities. The four focused participation themes of (a) historical research, (b) artistic representation, (c) performance, and (d) martial skills provide a context through which to study learning activities and suggested a pool of informants to interview about their experiences. To this end, three long-time, well-informed, and well-connected SCA participants were recruited as collaborators. Each collaborator suggested male and female informants as representatives in each of these four categories. Informants, selected from these lists by the interviewer, were either unanimously nominated, or nominated by two of the three collaborators. Recorded telephone interviews were conducted at the convenience of the informants and transcribed by the interviewer. Informants were given a transcription of the interview as well as a synopsis of the interviewer's impressions, on which they were asked to comment.

The data were thematically analyzed by the interviewer; first, coding for the three learning themes of self-directed learning, lifelong learning, and transformative learning, and, secondly, for the four participatory themes of historical research, artistic

representation, performance, and martial skills. The emerging themes of social interaction and sheltered society were identified and explored.

### Discussion

The thematic analysis of learning themes revealed an awareness of learning in informants' construction of their SCA-based projects and in the construction of informants' SCA participation around learning based activities. Not all activities participated in by informants had a conscious learning component, nor was learning the primary focus of SCA participation or enjoyment, which was described by all informants as being social interaction.

The conceptualization of learning reported by informants as projects, whether self-contained, or as part of a greater program, might be expected of activities that are designed to create artifacts or to allow participation in an activity, such as fighting or performing a song. However, the expectation, by informants, of engaging in designed learning as part of their participation in a hobby blurs the line between learning and leisure, which are more often conceptualized as distinct activities. This construction of leisure activities, referred to by most informants as a career, is similar to Stebbins' (1992) description of serious leisure in which participants consider their chosen activities as a career. In this construction, learning is blended with leisure as both a facilitating factor and a foundation for future activities.

Informants described their SCA learning activities in terms of enjoyment and ownership indicating an involvement that situates themselves at the centre of their

learning. The descriptors used by informants of the attraction of their involvement in SCA activities indicate that the self-directed nature of their projects, which was contrasted to formal learning in which learners follow an external curriculum, is a major factor in motivating ongoing learning activities. Informants spoke of involvement in activities as progressing along a linear process of learning which, in effect, described the creation of their own curriculum, including initiating the project, planning, designing, acting, and evaluating. No informant connected this process to a learned formula of curriculum design, but described the process as following a logical route to an ultimate goal, usually artifact production, performance, or behavioural patterning. In all cases informants described the initial step in the process as acquiring background or contextual knowledge. Similar to Tough's (1971) findings of adult self-directed learning projects, various methods of acquiring knowledge were described as accessed, including consulting with subject matter experts, printed sources, participating in on-line forums, taking classes, experimental archaeology, and examining historical artifacts.

This process, or rather a series of simultaneous, parallel ongoing processes, was described as not being reliant on external direction or reward. Rewards were described, and often dismissed, by informants as not being a motivating factor to their participation. While most did speak of others' pursuit of rewards as recognition, all but one informant had already received the highest award for arts and sciences. Most informants described involvement in the evaluation and reward process of judging arts and sciences competitions and characterized their evaluations as helping entrants with constructive

criticism to achieve greater authenticity. In describing learning activities, knowledge, and projects, informants spoke of their and others' participation in terms of sharing, rather than competition or recognition.

The process of learning undertaken by SCA participants was often described in terms of creating knowledge, usually in areas ignored by academics. The language used was indicative of alternate learning processes, the freedom to explore different sources of information, and the creation of alternate methods of acquiring knowledge. Acquired knowledge was claimed to be comparable to that achieved in academia and, in some cases, it was described as superior. It is apparent that participation in these processes and the perception of their value and validity gives meaning to informants' SCA experience.

The freedom to pursue learning projects of participants' choosing and in their preferred manner was stated as a major motivator to continued SCA involvement by informants. The expectation and eager anticipation expressed by informants of undertaking new projects, or continuing and developing projects already underway, speaks to the construction of the SCA as a vehicle for informants' lifelong learning. Informants described moving from project to project over a period of years and of the interweaving of different, simultaneous projects. All referred to the development of future activities through plans for travel, taking classes, acquiring skills and supplies, and conducting general background reading.

The perception of other participants engaging in and collaborating on similar plans and projects creates a picture of a group of like-minded participants whose

involvement is expected to include learning as a means of contributing to the society. Sucholodoski's (1976; as cited in Wain 1987)) situating of lifelong learning within societal development and Dewey's (1930; as cited in Wain, 1987) belief that "men live in a community in virtue of the things they have in common" (p. 207), may explain the place of learning in SCA participation as a process that provides what Fine and Holyfield (1996) describe as meaning sought in leisure group participation and belonging.

The threshold learning activity, expected of all participants, is the creation of a historical persona and the attempt at creating or acquiring garb of the historical period covered by the SCA. After this initial effort at historical research and costuming, participants are free to engage in whatever activities they prefer. The level of learning involvement of participants described by informants indicates that most become involved in the SCA as a vehicle through which to explore their own particular historical interests. Some informants described participants who dropped out of the SCA because they did not have an interest in continuing to engage in learning activities.

Most informants described long-term SCA participation using the metaphor of a career. Indeed, the level of involvement described by informants was of great depth, occupying much of their free time and lasting over a period of many years and, like Stebbins' (1992) description, these leisure careers are anything but leisurely. All informants described extensive travel to attend SCA events, participation in a great number of activities, significant expenditures, and extensive service to the SCA community. All informants described their SCA involvement as continuing throughout



their adult life and none forecast withdrawing from the SCA, though the level of involvement was described as varying over time and being affected by mundane intrusions.

The development of an historical persona was an ongoing theme and a point of reference for all informants. Although no participants described their persona as distinct from their own self, most informants saw their persona as a gateway to participation that facilitated the placing of oneself in a different reality in order to develop an understanding of meaning beyond their own experience. As described by Jestrovic (2002; as cited in Cramer, 2005), through the assumption of a theatrical role “one deliberately transforms I into other, turning the familiar, supposedly intrinsic self into his/her own stranger” (p. 86). Most informants dismissed the dream metaphor as valid or as a reason to participate in SCA activities and events, but all referred to their persona as a vehicle for developing a greater understanding of an individual’s experience in the middle ages. The use of the persona by informants as a vehicle through which to develop perspectives on life in the middle ages was an ongoing theme and appears to afford participants a constant point of reference for all SCA learning activities. Those informants who described changing personas also spoke of the creation of new outlooks on their SCA participation and historical perspective beyond changing their garb and equipment.

Informants related that the created structure of the SCA allows participants to explore aspects of the self unavailable to them within the mundane world, such as gender roles and positions of authority, and to explore behaviours, such as honour and chivalry,

described as lacking in modern life. Informants described having their lives and perspectives affected through their SCA experience, pointing to experiencing viewpoints or situations that conflicted with their own assumptions and knowledge. Frequent references were made by all informants to describe assuming the license to act in a manner not appropriate within the mundane world, but acceptable and oft expected within the created world of the SCA. The effect of these alternate forms of interaction or expression was described by all but one informant as a factor in developing the concept of themselves and perceived as also experienced by other participants. This effect certainly fits with Dirkx's (1997) belief in the negotiation between the self and the other as a requirement of transformative learning and allows for the critical analysis of meaning structures through challenging the mundane assumptions that Habermas (1984) describes as restricting the ability to understand our reality.

The created nature of SCA society was a frequent point of reference for informants in describing their involvement. Of particular interest was the communal development of a narrative through participant interaction. Descriptions of negative interactions were described as intrusions of mundane attitudes and sensibilities that distracted from and limited the creation of an idealized current middle ages. All informants acknowledged the preference for and conscious construction of SCA society as one built on the positive aspects of the middle ages (e.g. honour and chivalry) indicating both knowledge of historical realities and the intent of creating a place of social interaction that is inclusive, welcoming, and nurturing. That all informants

described their SCA activities as taking place in a sheltered setting suggests that they perceive the construction of their interaction and activities as incompatible with mundane realities. The SCA provides the shelter from expected norms and authority that Brookfield (1993) feels limits self-directed learning, whether such transgressions are adult play, costuming, or challenging educational hierarchies, the assumption of a persona provides similar insulation from an individual's construction of self and allows freer expression through a reality beyond his or her mundane experiences. Informants overwhelmingly described their SCA learning involvement as being free from the normal restraints imposed within their mundane reality.

Creating a participatory narrative to give shared meaning to SCA experiences was afforded a high value by informants. The ongoing narrative appeared in interviews as third party descriptions of preferred behaviour through the display of common values, created ceremonies, and looked-for occasions that would describe, for those who subscribe to it, the dream metaphor. A focus of the performance theme representatives was on the retelling of this narrative back to participants as a reflective screen that adds meaning and validity to their experiences. Similar to children's fables, these retold stories serve to inform participants of the cultural norms of the SCA and develop their cultural competence in a manner described by Meltzoff and Lenssen (2000). This reflection was described as affording participants the ability to see the component parts played by all in the construction of the narrative and to reinforce the positive aspects of social interaction.

Social interaction was, overwhelmingly, cited by informants as their greatest

attraction to participating in the SCA activities and formed the context in which learning was discussed. Social interaction was described by informants as acting as a learning tool for societal norms and expectations and for some participants as an opportunity to learn social skills they could use within the mundane world. Informants spoke in terms of trust and expectations of behaviour as factors that set SCA society apart from mundane interactions. The positive nature of SCA social interaction extends beyond events, with several informants reporting travelling abroad and staying with SCA participants whom they had never met. Another informant counted unmet SCA participants as friends through their on-line correspondence. The expectation of behaviour was discussed as a requirement of acceptable SCA participation, the transgressors of which were described by most informants in negative terms and resultant societal disapprobation given as the reason for some individuals dropping out of the SCA.

The metaphor of family to describe SCA social groups was widely used by informants to describe both their circle of friends as well as the greater populace. The construction of friendship groups as nominal family units may be related to the sheltered, created aspect of the SCA that removes it from the mundane world to afford a greater sense of an alternate society. Similarly, SCA subassociations speak to relationships at various levels through the use of terms, such as household, guild, and college, invoking medieval social and community groups.

The family metaphor also provides insight into the reasons that participants devote such effort to their SCA careers. In all cases, informants described their learning

activities as both a benefit to themselves and to others. In some instances, informants' activities were conducted solely for the purpose of facilitating others' opportunities and activities.

The four research questions posed in Chapter One are intended to answer how the SCA acts as a structure or community that encourages and enables the learning undertaken by participants. Each of the four research questions is presented below and considered from the analyzed data.

*How does participation in the SCA motivate individual participants to engage in self-directed learning, lifelong learning, and transformative learning activities?*

All informants indicated a lifelong interest in the middle ages, as well as interests in one or more activities found in the SCA. Other participants were also described as sharing in similar interests and this commonality was described as a factor in defining SCA participants. The initial self-selection, that populates the SCA with like-minded participants with common interests, is the unifying factor in developing SCA social cohesion. Common interests and common outlooks form the basis of a coherent society in which individuals can feel free to engage their eclectic interests with the expectation of support and approval.

The social bond that was described as central to informants' reasons for participation appears to instill in participants a sense of obligation and expectation to contribute to the SCA through development of the self as an informed and active participant. Similarly, there is an expectation of support and encouragement from others, as well as expectation

of support structures for use of individuals when planning their projects.

Cramer (2005) posits that the created personas and created community place the individual outside of his or her own experience and beyond the restrictions of the mundane world and thereby encourage self-development connected with the SCA. I would refocus that consideration on the created SCA world and the individual's place within it to see that the individual develops the desire to contribute to an increased level of authenticity and to facilitate the creation of a society and environment that fulfils the needs of the collective vision of the current middle ages. This environment is encouraging of the production of artifacts, modelling of behaviours, and delivering performances with the knowledge that these contributions enhance the collective, created narrative. It is into this narrative that individuals seek their perspective. The created society is not a recreation of the medieval world, but a re-created idealized society that affords the participant with an experience similar to Lengkeek's (2001) description of the tourist experience through which the different perceptions generated by a different reality facilitate a greater understanding of one's self.

*Do participants have learning experiences beyond the enjoyment of leisure when they engage in activities as part of their SCA involvement?*

Conceptualizing leisure and learning as separate activities places learning into a dichotomous life view that assigns value relative to the perceived functional and productive attributes of activities. Stebbins' (1992) construction of serious leisure includes benefits equally applicable to leisure and learning "self-actualization, recreation

or renewal of self, feelings of accomplishment, enhancement of self-image, self-expression, social interaction, and belongingness” (p. 257). Informants did not separate learning from their SCA-based leisure activities, but spoke of the overall construction of their experiences as an integrated activity of which social interaction was the central focus point and learning was both a supporting activity as well as a by-product of participation.

Informants spoke with enthusiasm about the synergistic effect of multiple learning activities intersecting during SCA events, collegiums, and social gatherings. The individual learning projects, of both informants and other SCA participants, were described as being integral to their enjoyment in participating in activities and in creating artifacts. Informants’ construction of their learning projects followed a pathway that could be viewed as curriculum design that had, as the outcome, an identified amount of learning, as well as the production of an artifact, a performance, or participation in an activity.

*How is the SCA is constructed to facilitate learning activities?*

Informants described a limited structure for facilitating learning activities within the SCA based, mainly, around the expectation of mentoring roles for those elevated to peerages, though others, too, were described as taking on that role. Informants spoke of the sense of obligation to act as a mentor, but also of their desire to share their knowledge with other enthusiasts at all levels of expertise.

Most informants described participating in arts and sciences exhibitions either as

entrants or as judges and related these events as opportunities for demonstrations of accomplishment as well as opportunities for productive and constructive commentary that entrants could use to improve their future efforts. Interestingly, several informants also spoke with disdain of those participants who only participate in such events in order to gain reward or recognition, giving the impression that the SCA normative value of learning activities is based on effort and the desire to learn and to share. The construction of learning efforts as community supportive and developmental activities demonstrates the importance awarded to societal cohesion and the value informants place on their social network.

The self-directed basis of participants' learning projects seems to be at odds with the social construction of the learning environment. All informants spoke of some form of collaboration or consultation with other participants, but expressed claims of ownership over their learning. Informants described an expectation of willingness on the part of others to help those participants who asked for assistance in their learning efforts. Informants also spoke of willingly, and sometimes enthusiastically, helping others beyond their assumed roles as mentors.

References to subject matter experts were positively constructed and ascribed to these individuals a level of status. Similar references by informants of their own subject matter expertise described feelings of contribution, generosity, and status. The status of subject matter experts may help define the profit hypothesis of Stebbins (1992) in relation to SCA participation, in that roles are available to participants who may utilize their



learning activities to achieve recognition and fulfillment outside of any formal awards structure. Jones (2000) asserts that a participant's self-image is defined by group membership. Subject matter experts form a subset social group that gives value to their identity through placing them in a positive role. Each participant may develop his or her own specialist role and that membership in this "social group, and being seen by others to be a member of a group, is an important mediator of an individual's cognitive, affective, and behavioural processes" (Jones, p. 284).

*Are the self-directed learning, lifelong learning, and transformative learning activities, engaged in by participants in the SCA, different from experiences derived from formal learning processes?*

SCA based learning was frequently contrasted with formal learning and, in most instances, favourably so. Informants were convinced of the validity of their learning and commented upon it in positive terms and even elevated the nature of specific types of their learning, often related to experimental archaeology, as superior knowledge with a basis of empirical proof. The freedom to explore a subject from the informant's own perspective was cited as a motivating factor as was conducting learning away from the hierarchical structure of formal learning and the perceived elitist claim to truth by academic experts. This positive construction of the nature of SCA-based acquired knowledge was contrasted with academics' reliance on conjecture or erroneous historical descriptions, particularly in relation to practical aspects of medieval material culture or practices.

Informants related their SCA-based learning experiences in terms of liberation from imposed academic processes and structures. SCA-based learning activities were described as fun and contrasted with the dry learning and subject matter available in postsecondary institutions. Informants described the expectation that their SCA-based learning would be fulfilling, productive, and valued by other participants. Informants expressed excitement when describing the process of learning, the possibilities of new projects, and sharing their learning with others.

Whereas freedom formed the basis of the differentiation between descriptions of formal and SCA based learning, self-expression formed the subtext of informants' measurement of fulfillment that gave greater value to their SCA-based learning than their formal learning. Informants expressed pride and ownership of their SCA-based learning that placed them into a position of recognized knowledge and ability that was tied to their projection of self-image.

#### Implications for Practice

The totality of the experience of SCA learning suggests little place for similar constructions in a structured educational setting. The comparisons made by informants of their SCA learning to formal learning was expressed as dissatisfaction in their formal education experiences and situated their SCA learning as much more rewarding. Understanding the success of SCA-based learning and the reasons for informants' dissatisfaction with formal learning structures may help educators, particularly adult educators, foster a more effective learning environment. Whether SCA participants, and

these informants in particular, are unique learners is not clear. However, there were several themes of preferred learning opportunities and experiences referred to by all informants, for which access was attributed to the structure of the SCA.

Informants emphasized the importance of having the freedom to pursue their own goals in the manner that best suited their interests. This freedom took the form of using creative or alternate methods of research, exploring areas of interest as they arose, even if the original goal of the learning was postponed or abandoned, and the ability to set the pace of learning. By making all of the choices about learning processes and parameters, informants described their learning in strong terms of ownership. Informants were seeking control over their own learning and assumed responsibility for the outcome.

By providing more control to learners in deciding the types of learning and methods of creating knowledge, educators may find a deeper involvement by learners and a greater perspective of ownership of their learning. Similarly, an evaluative process that gauges the learning process as well as the outcome may better provide encouragement to continue individual studies. Informants frequently compared formal education, which they described in terms of restriction and hierarchy, with the control that they, as learners, possessed over their own learning processes. Learner ownership of process and evaluation encouraged exploration and continued studies by informants beyond initially defined goals. The acceptance, within the SCA community, of research methods not commonly used within academia, afforded validity to their often unique learning efforts and value to their acquired and/or created knowledge.

The ongoing active learning reported by all informants and described by them of other participants, suggests that the supportive nature of the SCA is encouraging of lifelong learning. Investing the concept of validity into learners' self-directed studies would move the concept of lifelong learning beyond the confines of pursued certification. The encouragement to continue learning without receiving academic reward may appear counter-intuitive to educators; however, if the purpose of learning is defined by the learner and if the goal of educators is to foster an attitude of lifelong learning, then educators, at some point, must accede control over the process to the learner.

Within the milieu of adult education, exists the opportunity for educators to build upon the characteristics of adult learners, as well as the structure of voluntary education, to apply the framework of successful learning that has been identified within the SCA. The self-selection of adult learners within a program or course identifies the learner as possessing the motivation to succeed. The population of the program or course affords the educator the resource of a society, however temporary, from which to build a learning society. By making use of the identified markers of successful learning reported by SCA informants, educators can structure opportunities in which learners can find meaning that is of relevance to them, and to interact with and observe other learners' experiences to provide a deeper understanding of their own learning experience.

Self-directed learning would be fostered through developing ownership in learning by providing adult learners with meaningful input into the content and evaluation of the learning opportunity. Providing learners with the opportunity to

contribute to the design of instructional and learning methods would recognize the awareness that adult learners possess their own unique learning needs and preferences. Ownership, in these situations, would develop through demonstrating recognition of individual value and contribution. Similarly, encouragement of contributions, and the valuing of contributions to the group, instructor, and other individuals, would place the adult learner in the role of mentor and give added value to individual contributions.

The development of a pursuit of lifelong learning by an adult learner, as suggested by SCA informants, situates the learner in multiple roles. The self-directed learner, the mentor, the planner, and the evaluator are roles that are played by instructors, but also by successful learners who pursue learning as a goal of personal development. The successful integration of the adult learner into a group of peers within a setting of shared learning offers the opportunity for learners to develop connections and grow their abilities through the synergy afforded by cooperative learning efforts. The development of portable skills that may be transferred to other learning situations is a valuable acquisition to the lifelong learner and gives such lessons greater value than merely the acquisition of course content.

Personal growth through transformative learning might not be the goal of adult learners, but opportunities for learners to construct new meanings within learning situations can be facilitated through the structure of the learning environment. Valuing adults' learning and knowledge and encouraging sharing of this knowledge, as well as individual perspectives with fellow learners, honours the individual and recognizes the

value of his or her input. The exploration of alternate solutions based on perspectives that may be based on different values or life experiences would afford individuals the opportunity to reconsider and reformulate beliefs to assimilate or confront alternate meaning structures. The creation of a more organic learning environment, with the goal of creating a learning space where all components of learning are interreliant, can be accomplished by identifying the adult learner as the focus of the learning activity and situating that learning within a group of respected, valued learners.

The societal construct of the SCA appears to have a major influence on the motivations of learners to engage in SCA learning activities. Informants described learning as, variously, a contribution, an enculturation, and an initiation to SCA society, as well as a valued activity. These ties to the created society of the SCA place learning into a different category than just a source of personal development, although it acts in that function as well. This may not be a construct of a learning society in a traditional educational concept, but learning is a large part of the SCA's foundation.

The most direct application of this knowledge may lie in other leisure groups, though that term is inadequate, such as historical re-enactors, historical societies, musical societies, genealogical societies, radio clubs, and astronomy clubs. These groups share the same sort of self-selection process of member attraction as the SCA that gathers a number of participants with the same or similar interests to achieve a critical mass that facilitates a synergistic energy. Participants feed off of each others' enthusiasm, receive recognition from those whose opinions they value, and have a ready forum for presenting

their learning.

It would be unreasonable to expect that the SCA's social structure, which may be the heart of its success in learning, could be recreated in other organizations. However, it would be reasonable to assume that other groups' members could utilize similar approaches to learning and share a similar desire to achieve a level of personal development through their learning. Their individual involvement or organizational culture may further inspire learning for the purpose of developing their organization or avocation. Presenting examples of situations and structures from the successful SCA model to other leisure groups could help those groups develop important learning organizations within the boundaries of the organizational culture.

For educators to construct a learning-society or culture beyond the traditional educational framework would require latitude for social innovation. Within this created structure would be the ability to redefine merit and contribution in order to encourage the interaction and interdependence that would facilitate greater feelings of fraternity and collegiality. The greatest gains toward fostering more self-directedness and a pursuit of lifelong learning might lie in developing a social structure that draws on SCA experience within an existing educational setting.

The currently defined boundaries of formal education do afford opportunities for exploring the effect on learning of certain factors identified by informants as contributing to their learning experience, without attempting to mimic the broad scope of attributes that differentiate SCA society from mundane educational structures. It would be possible

to build upon specific characteristic groupings that exist within the SCA that could be tailored to the needs of the target demographic learning group. The cohort structure of learning groups that maintain membership throughout a program, for example, might develop the societal cohesion that was a prominent point of reference for informants' description of their learning experience. In this construction, the influence of other participants in the program, through created common or shared experiences and an increased reliance on, and trust in, others who are pursuing similar learning, would develop a more cohesive, though artificial, social group.

Since it was in the social cohesion of the SCA that informants contextualized their experiences as positive, productive, and enjoyable, the value of creating and developing community ought to be explored for the potential of developing a beneficial learning environment. As with the cohort example, the development of a shared experience environment is perhaps the simplest method through which to develop societal cohesion. Within current educational structures, an increased reliance on group work, group assignments and projects creates an immediate interreliance on other group members. More complexly, the development of an interreliant, interactive classroom dynamic that encourages individual contribution as an important component to understanding the whole would more closely parallel the SCA structure of interreliance and cooperation. This process would place more reliance on the individual to assume more control of his or her learning goals, as well as initiating learning activities.

Similarly, events and activities outside the classroom can serve a function



independent from or integrated with classroom interreliance. This research points to the value of shared experiences that reinforce group identity. Extant within educational structures are various community creating and reinforcing activities, such as sports, art programs, and clubs, the accessibility of which, and the support they receive, are a matter of choice to educational decision makers who could include these programs within the greater vision for community creation. School uniforms or a dress code might also contribute to the creation of community the use of which is a close parallel with the SCA experience of wearing medieval period garb, as frequently described by informants.

The participation in and value associated with mentorship, described by most informants, suggests that there may be value in introducing or developing a similar structure within a formalized educational structure. Peer mentorship, upper year mentorship, and alumni mentorship all present opportunities for more direct and personalized guidance of study, as well as providing access to subject matter experts; a factor described by informants as a valuable resource. This process further develops the concept of social cohesion, both within the typical age segregated basis of linear education as well as fostering intergenerational connections. Projecting the learning environment beyond the graduation or certification stage creates an expectation of lifelong learning that is accessible and an integrated component in the learning process.

### Implications for Theory

Educational literature examining self-directed learning, for the most part, does so from the perspective of a skill set or measurement of learner maturity. Tough's (1971)

and Livingstone's (2001) treatment of self-directed learning is in the context of learning that falls outside of the bounds of formal learning and so is not compared with the traditional educational paradigm. Indeed, the classification of self-directed learning as informal learning is entirely dismissive of a comparative value with its more formal counterpart. In this study, informants engaged in an ongoing comparison of SCA-based learning activities with formal educational experiences. They assigned high value to their and others' SCA-based learning; however, it was apparent that they felt the need to make this positive comparison in order to overcome either their own or the interviewer's assumed perception of the value typically assigned to the different types of learning.

Overcoming the bias applied to self-directed learning would require the reconceptualization of self-directed learning by educators to allow for an evaluation based on outcome, as well as recognition of the validity of the process in order to create a more inclusive atmosphere that could broaden participation in learning activities. Within the SCA, where there is no stigma attached to self-directed learning, such learning is afforded a high value and learners granted status based upon their accomplishments. Educators might, if we are to follow Habermas (1984), consider reformulating terminologies to afford a higher standing to self-directed learning, as opposed to terminology constructed to suggest a dichotomous comparison, in order to change the perception of this alternate method of learning.

The dichotomous construction of the terms leisure and learning separate in act and value the perception of participants' efforts. Learning still lingers under the temporal-

linear construction that assigns learning to an early part of life and only acknowledges later life learning as a response to unfortunate circumstances. Even Stebbins' (1982a, 1982b, 1992, 1997a, & 1997b) positive descriptions of leisure dichotomize leisure from other productive activities. Stebbins seeks to provide increased status for leisure activities, but does so from the perspective of a life anchored on a vocation to which leisure is a comparative value activity. Although educational rhetoric describes learning with terms, such as joy, satisfaction, and emancipation, it remains tied to the idealized construction of an earlier expectation of career and life progression.

The SCA may provide an example of a learning society, outside of the formal educational industry, that is constructed to encourage and support learning by all who choose to participate. Wain's (1987) ideal of a learning society that is accessible to all who seek it takes lifelong learning out of the hands of gatekeepers and democratizes participation. The monopolization of the term lifelong learning by educational institutions does little to encourage ongoing learning beyond the pursuit of certification. As with self-directed learning, the construction of terminology influences the assignment of value to the process of lifelong learning. Accessibility to lifelong learning, that is afforded value, would be expanded with the broadening of the scope of what are considered valid learning experiences.

Mezirow's (1991) concept of perspective transformation does not rely on a particular outcome for success and does allow for a rejection of the new knowledge. If this process or occurrence is to be judged to have value, it must exist in the challenge

posed by experiencing a perspective that is in conflict with the individual's own constructed meaning structure. Within the SCA, participants consciously seek to transform their perspective through the establishment of an alternate environment in which mundane expectations and references are displaced. The goal is to develop a perspective based on the experiences of an individual in an alternate reality based loosely on an historical model. The construction of educational theory to recognize the value of exposure to other perspectives and not be restricted to measuring success through attaining certain outcomes would clarify the intent of the process and, perhaps, garner a greater acceptance of the processes validity.

#### Implications for Future Research

This study has been hampered by the difficulty of trying to coordinate the schedules of 8 informants, 3 collaborators, and the interviewer. Also tied to this initial phenomenological study was time involved in both the interviews and the resultant transcriptions due to the desire to conduct free flowing interviews that would allow for full expression by informants and probing, sometimes speculatively, by the interviewer in order to develop a rich base of data with which to work. Although interviews were necessary at this stage, future studies may be able to utilize asynchronous communications and surveys or other formulaic formats.

If this study was to be duplicated, an improvement might be to select informants from a wider pool of SCA participants. Although it was not apparent at the time of selection, all but one of the informants had been awarded the highest award most closely

connected with learning. All informants had significant formal education, with 3 holding post-graduate degrees, and, although questions were asked about other participants' experiences, it is unclear whether the selection of these informants was representative of the greater SCA population. A future study might clarify this point and develop a broader perspective on the influences from SCA-based learning by establishing a greater understanding of SCA demographics and values.

Though a greater understanding of SCA-based learning may be accomplished by building on this study and delving deeper into the unique setting and interaction of SCA participants, educators might also find value in research into the application of this knowledge into more traditional educational settings. The design of programs, or even institutions that focus on the needs of various identifiable groups, or, perhaps, specific areas of study, whose or which needs are not sufficiently met by traditional educational structures, may benefit from a greater understanding of the SCA learning dynamic.

Similarly, the effectiveness of program design could be differently and more effectively assessed by use of a lens based on SCA learning success. This study suggests that there are several identified factors that have influenced informants' SCA learning activities. Social cohesion has emerged as providing the greatest described influence to learning engagement; however, individually tailored courses of study, as well as the presence of opportunities for study in many different areas, have been described as motivating factors in informants' descriptions of the reasons for pursuing learning within the SCA milieu. Examination of programs for their ability to satisfy these needs or

desires of participants could suggest alternative program delivery methods, techniques, and structures.

Of pertinence to evaluating the success of any program, is the understanding of the self-selection of participants. This study suggests that the structure of the learning environment as well as the community in which the learning takes place is a determinate of selecting to participate in a program or course of study. Whether the design of programs and institutions is inclusive or exclusive of individuals with certain preferences, needs, or perspectives can be better assessed through a greater understanding of the place that these characteristics have in the decision-making process of program, course, or institution participation. In this study, informants described their self-selection of the SCA as a particular learning environment, whether exclusively, or as an adjunct to formal education. Of interest to educators may be the implications for tailoring programs or institutions to already identified socially cohesive groups within society, such as those described by cultural, ethnic, linguistic, or faith-based affiliations. Similarly, understanding the process of self-selection could suggest the development of programs that serve particular learning styles and preferences, for those specific demographics and, therefore, become more accessible to those who would now deselect programs that do not meet their needs.

This research creates the opportunity to build on this initial phenomenological study and to examine a larger population of the SCA. Questions should develop from this study that will enable the creation of a meaningful quantitative study to examine broader

questions of learner motivation and practice, as well as more particular questions that explore learning outcomes to compare SCA-based learning with formal learning.

This study will provide researchers examining learning beyond the confines of traditional education with guidance in the how learning communities may be structured. The development, through new media, of new social structures and modes of interaction, as well as new and different opportunities for learning, allows, enables, and encourages the individual learner to seek out other individuals and organizations with whom to learn and develop meaning within alternate social environments. Educators would do well to recognize the value to learners within these alternate structures and to construct formal learning that would allow and encourage interaction between these structures to develop and provide meaning, on an individual basis, within the broader goal of developing and serving an educated citizenry. Moving beyond the mass education model of previous centuries and involving the learner in decisions about meaning construction, value, and timelines, can enable the individual to experience learning as a lifelong activity that exists outside of schooling and is within the control and to the benefit of the individual.

### Conclusion

The SCA may form that idealized learning society to which educators point as the goal of a complete educational process. It may, however, point to a unique group of people drawn together by a shared interest in the middle ages. The significance of SCA-based learning is that it is done willingly, eagerly, and over great lengths of time. The involvement in learning goes beyond what could be expected to occur within a leisure

group setting. SCA participants bring a common interest and a highly focused period of study that may go some way to explaining the phenomenon, but informants, even when asked repeated questions about learning activities, always turned the discussion toward the created society.

The family metaphor was frequent cited, as were the developed friendships enabled by SCA participation. Informants tended to phrase their learning efforts and activity participation in the context of their social interaction. Most informants described their social interaction and network as the most valuable aspect of their SCA experience. The conclusion that offers itself is that it is the social ties that SCA participants value and seek and find learning an activity that they can share to further that interaction. The developing culture has recognized learning, whether consciously or intuitively, as a bonding factor and a developing factor that brings new participants into the social milieu and provides a point of reference for continued interaction. The sheltered aspect of SCA society gives participants the freedom they require to release their mundane enculturation and join into a culture through which they can find modes of expression not otherwise realized. In this study, SCA participants were involved in the creation of meaning that can be derived from such self-directed, lifelong, and transformative educational environments.



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## Appendix A

## University Research Ethics Board Clearance Letter



**Brock  
University**

Office of Research Services

Research Ethics Office

St. Catharines, Ontario, Canada L2S 3A1

T: 905-688-5550, Ext. 3035/4876 F: 905-688-0748

[www.brocku.ca](http://www.brocku.ca)

DATE: December 3, 2008

FROM: Michelle McGinn, Chair  
Research Ethics Board (REB) *Michelle K. MC*

TO: Ann Marie Guilmette, Recreation and Leisure Studies  
Dan Damianoff

FILE: 08-068 GUILMETTE/DAMIANOFF  
Masters Thesis/Project

TITLE: Self-Directed Learning, Lifelong Learning, and Transformative Learning in the Society for Creative Anachronism

The Brock University Research Ethics Board has reviewed the above research proposal.

**DECISION: ACCEPTED WITH NOTE**

**Please note:**

- Please remove the reference to anonymity in the consent form. Participation in this project is not anonymous; participation is confidential.

This project has received ethics clearance for the period of **December 3, 2008 to May 30, 2009** subject to full REB ratification at the Research Ethics Board's next scheduled meeting. The clearance period may be extended upon request. ***The study may now proceed.***

Please note that the Research Ethics Board (REB) requires that you adhere to the protocol as last reviewed and cleared by the REB. During the course of research no deviations from, or changes to, the protocol, recruitment, or consent form may be initiated without prior written clearance from the REB. The Board must provide clearance for any modifications before they can be implemented. If you wish to modify your research project, please refer to <http://www.brocku.ca/researchservices/forms> to complete the appropriate form Revision or Modification to an Ongoing Application.

Adverse or unexpected events must be reported to the REB as soon as possible with an indication of how these events affect, in the view of the Principal Investigator, the safety of the participants and the continuation of the protocol.

If research participants are in the care of a health facility, at a school, or other institution or community organization, it is the responsibility of the Principal Investigator to ensure that the ethical guidelines and clearance of those facilities or institutions are obtained and filed with the REB prior to the initiation of any research protocols.

The Tri-Council Policy Statement requires that ongoing research be monitored. A Final Report is required for all projects upon completion of the project. Researchers with projects lasting more than one year are required to submit a Continuing Review Report annually. The Office of Research Services will contact you when this form *Continuing Review/Final Report* is required.

Please quote your REB file number on all future correspondence.

MM/an

## Appendix B

### Participant Interview Guide

#### Interview Guide

#### Interview Guide for SCA participants

##### Preamble:

Hello, thank you for agreeing to participate in my research on your involvement in SCA. This project has been reviewed and received clearance through the Brock University Research Ethics Board (file # 08-068). In the event that you have any questions or concerns about your participation please contact the Research Ethics Office at (905) 688-5550 ext. 3035. Thank you for your time and interest, which are very much appreciated.

Your responses are being recorded, and the interview will last approximately one (1) hour.

1. Please describe your names (pseudonym, or initials only for anonymity and confidentiality purposes), both mundane and selected for participation in the SCA.

Probe for:

- Any similarities or differences between both
- Any similarities or differences to own heritage
- Identifying or connecting with a hero
- Evidence of links to historical research
- Image assumed or projected

2. Please describe how you came to be involved with the SCA.

Probe for:

- Introduction by an SCA member or through own interest
- Length of time of involvement
- Depth of involvement
- Search for unique experience (special skills)
- Dissatisfaction with other opportunities
- Dedication to leisure pursuit
- As an indication of satisfaction
- Therapeutic alternate experience
- Opportunities for learning

3. Please describe your (SCA) persona.

Probe for:

- Traits of persona as compared to individual
- Pursuit of the dream
- Any similarities or differences with your own heritage



- Identifying or connecting with a hero
  - Evidence of links to historical research
  - Image assumed or projected
  - Connection to selected participation in SCA activities
  - Leisure purposes
  - Learning purposes
4. Please describe your involvement and roles in the SCA.  
Probe for:
- Historical research
  - Artistic representation
  - Performance
  - Martial skills
  - Academic interest
  - Depth of involvement through offices/positions held
  - Construction of participant's persona
5. Please describe your motivations for participating in the SCA.  
Probe for:
- Learning types (self-directed, lifelong, transformative)
  - Demonstrating skills
  - Dissatisfaction with other opportunities
  - Social interaction (societal interaction)
  - Seeking acceptance
  - Experiencing the "dream"
6. Please describe any benefits you receive from your involvement in the SCA.  
Probe for:
- Personal growth benefits (competency, capacity, recognition)
  - Therapeutic values (stress relief, engagement, fulfillment, alienation from work)
  - Social networks (friendships, community, romance)
  - Economic gains (direct or indirect)
  - Status enhancement (within outside the SCA)
7. Please describe any of your experiences that are similar to and/or different from other SCA participants.  
Probe for:
- Perception of uniqueness or similarity of experience
  - Comparison of depth of involvement
  - Categorizing involvement
  - Measuring satisfaction

- Identifying factors in satisfaction

Thank you again for your participation in this project.

## Appendix C

### Letter of Invitation

Dear Potential Participant:

I am conducting a research study entitled "Self-Directed Learning, Lifelong Learning, and Transformative Learning in the Society for Creative Anachronism." Please read the project description that follows, and consider participating in an interview.

This study is being conducted by Dan Damianoff under the supervision of Dr. Ann Marie Guilmette through the Department of Graduate and Undergraduate Studies in Education at Brock University. You are being invited to participate in a Masters' thesis project in which I am investigating how involvement in SCA activities is related to self-directed, lifelong, and transformational learning experiences. The researcher's plan is to **conduct telephone interviews with** SCA participants to investigate their opinions and perceptions of the educational benefits of involvement in SCA activities.

The telephone interview (in which you are being invited to participate) will take approximately one hour. Your participation in this study is voluntary and you may refuse to participate without penalty. Please feel free to accept, postpone or decline participation in this study. In addition, should you decide to participate, feel free to refuse to answer any of the questions asked or to withdraw from this study at any time.

All information collected from participation will be interpreted anonymously. Thus, your name (and SCA persona) will not appear in any report, publication or presentation resulting from this study. All data with identifying information will be retained and will be securely stored in a locked location. The researcher will keep all information about you confidential.

There are no foreseeable risks to your well being through participation. However, the information obtained from this research may benefit future adult educators who are interested in motivating and encouraging adult student learning.

This project has been reviewed and received clearance through the Brock University research ethics board (File #08-068 ) and will be completed by May 2009. At your request, a summary of the findings will be provided. In the event that you have any questions or concerns about your participation please contact the Research Ethics Office at (905) 688-5550 ext. 3035.

Thank you for your interest and involvement in this study. If you are interested in participating, **and would be available for a one-hour telephone interview, please contact the researcher electronically** as described below.

Researcher's Name: Dan Damianoff  
[dandamianoff@rogers.com](mailto:dandamianoff@rogers.com)

Faculty Supervisor: Ann Marie Guilmette, Ph.D.  
(905) 688-5550 ext. 3124 or at [aguilmette@brocku.ca](mailto:aguilmette@brocku.ca)