Combining Life History and Life-Course Approaches in Researching Lifelong Learning: Some Methodological Observations from the ‘Learning Lives’ Project

Gert Biesta, University of Exeter, Phil Hodkinson, University of Leeds, Ivor Goodson, University of Brighton

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Address for correspondence:
Prof Gert Biesta
CEDC/Centre for Educational Development and Co-operation
University of Exeter, School of Education and Lifelong Learning
Heavitree Road
Exeter EX1 2LU
g.biesta@exeter.ac.uk
www.learninglives.org

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Introduction

*Learning Lives* is a longitudinal study which aims to deepen understanding of the meaning and significance of formal and informal learning in the lives of adults, and aims to identify ways in which the learning of adults can be supported and enhanced. In this project, a collaboration between the Universities of Exeter, Brighton, Leeds and Stirling, we are particularly interested in the relationships between learning, mobility and migration, learning, work and unemployment, learning in the family and the community, and the learning of older learners. What makes the project relatively unique is not only its length (a data-collection period of almost three years) and size (about 750 in-depth interviews with 150 adults age 25 and older, plus a longitudinal questionnaire study with 1200 participants), but also the fact that it combines two distinct research approaches, *life history research* and *life course research*, and that within the latter approach, it utilises a combination of *interpretative longitudinal research* and *quantitative survey research*.

Besides the complex logistics of such a project, the combination of different research approaches raises particular methodological challenges, both for data-collection and for data-analysis and interpretation. In this paper we want to present our current thinking about the methodological challenges that stem from the combination of life-history research and interpretative life-course research. The paper consists of three steps. We first discuss our rationale for combining life history and life course research. Next, we give a short characterisation of life-history research and interpretative life-course research. Against this background we then discuss some key-issues raised by combining the two approaches, focusing both on difficulties and tensions and on the ways in which this particular combination has the potential to generate unique insights into the learning biographies of adults.

Researching Learning, Identity and Agency in the Life-Course

The main focus of *Learning Lives* is on the interrelationships between learning, identity and agency. On the one hand we seek to understand how identity (including
one’s identity as a learner) and agency (the ability to exert control over one’s life) impact upon learning dispositions, practices and achievements. On the other hand we seek to understand how different forms and practices of learning and different learning achievements impact upon individual identities (including learner identities), on individuals’ senses of agency, and on their actual capacity to exert control over their lives. In order to do so, we examine the meaning, significance and impact of a range of formal, informal, tacit and incidental learning experiences from the perspectives of adults learners. More importantly, we do so against the background of their unfolding lives. We aim to understand, in other words, the transformations in learning dispositions, practices and achievements which have been triggered by changes in the life-course. The unit of analysis in our project is therefore the learning biography (see Dominicé 2000).

For the purposes of the project we treat learning as one of the possible ways in which individuals respond to events in their lives, often in order to gain control over parts of their lives (see Ranson et al., 1996; Antikainen et al, 1996; Alheit 1994; Biesta 2004a). Such responses might take a number of quite different forms, ranging from adaptive to more active, creative or generative learning. To understand learning as a response implies that it is seen as contextually situated (the learner interacting with and participating in the social and cultural milieu) and as having a history (both the individual’s life history and the history of the practices and institutions in and through which learning takes place). The events to which learning is a response may be structured transitions or they may be changes of a more incidental nature, including critical incidents such as redeployment or illness. Many such events stimulate encounters with new formal and informal learning opportunities. They can also result in forms of tacit learning of which individuals sometimes only become aware (long) after the event. Learning also occurs, however, in relation to the routines of everyday life, where ‘turning points’ (Strauss 1962) are not immediately discernible.

Given the purposes of our research, it is clear that both time and context are central to what we aim to achieve (see Dewey 1938). We focus on context, because we hold that learning is about more than cognitive processes happening inside the mind. Learning is inextricably related to doing and being, which is why we need to approach what and how people learn through an understanding of the contexts in which and, more importantly, the practices through which they learn (see Hodkinson, Biesta & James 2004). Learning also always involves the reworking of earlier experiences, while in many cases people engage in learning in order to achieve or bring about future change. This is why learning also needs to be understood in its temporal dimension. In our project, the temporal point of view is essential for two further reasons: firstly because of our interest in the interrelationships between learning and life (the learning biography), and secondly because the contexts in and through which people learn are themselves not static but subject to change and transformation (for example in the way in which available opportunities for learning change over time; see, e.g., Antikainen et al., 1996; Gorard & Rees 2002). This, in turn, means that contexts matter at two levels: the immediate contexts in and through which adults learn and the changing contexts that form the ‘backdrop’ of their learning biographies.

There are, therefore, three key methodological questions: (1) How can we investigate contexts of learning?, (2) How can we investigate the temporality of learning?, and (3) How can we investigate the temporality of learning contexts? The answer to the
second question brings us to the two main approaches of the Learning Lives project: the life-history approach and the life-course approach. The temporality of learning can either be examined retrospectively or in ‘real time.’ The retrospective understanding of the learning biography is the main aim of life-history research, while the real time ‘tracking’ of the ways in which learning biographies are ‘lived’ is the main object of longitudinal life-course research. Several studies have utilised these approaches for understanding the learning of (young) adults from a temporal point of view. Most of them, however, have either used a retrospective or a real-time approach (examples of the first are Antikainen et al., 1996; Gorard & Rees 2002; examples of the latter are Hodkinson, Sparkes & Hodkinson, 1996; Ball, Maguire & Macrae 2000). What characterises the Learning Lives project, and probably makes it unique, is its combination of (retrospective) life-history research and (real-time) longitudinal life-course research.

The reason for combining the two approaches is not only that it increases the time-span available for investigation (albeit that the retrospective study of the learning biography can only be done through the accounts and recollections of participants). It is also because we believe that the combination of the two approaches allows us to see more and gain a better understanding than if we would only use one of them. To put it simply: life-history research can add depth to the interpretation of the outcomes of longitudinal life-course research, while life-course research can help to unravel the complexities of life-history research. Each, in other words, is a potential source for contextualising and interpreting the findings of the other.

In this paper we will focus on issues that have to do with the combination of life-history research and interpretative longitudinal life-course research. This is not only because both are forms of interpretative research which together make up the interpretative part of our project. There is also a more pragmatic reason, which has to do with the fact that in our project both approaches make use of the same method and the same process of data-collection (the life-history/life-course interview). One of the questions this raises is if, and if so how, one data-collection process can serve two different research approaches. Before we deal with some of the complexities and interesting aspects of combing the two approaches, we will briefly characterise life-history research and interpretative longitudinal life-course research.

**Life-History Research and Interpretative Longitudinal Life-Course Research**

According to Goodson and Sikes (2001, p.1) “life historians examine how individuals talk about and story their experiences and perceptions of the social contexts they inhabit.” This already reveals that life-history research is more than the simple collection of stories about individuals’ lives. Although the collection of such stories is a crucial first step in life-history research, and although such research is fundamentally interested in the ways in which people ‘story’ or narrate their own lives, life-history research aims to understand those stories against the background of wider socio-political and historical contexts and processes. Goodson (1992, p.6), writing about life-history work with teachers, emphasises that

> the crucial focus for life history work is to locate the teacher’s own life story alongside a broader contextual analysis, to tell in Stenhouse’s words
‘a story of action within a theory of context.’ The distinction between the life story and the life history is therefore absolutely basic. The life story is the ‘story we tell about our life’ (...) The life history is the life story located within its historical context.

Although life stories are the starting point for life-history research, such stories are in their nature already removed from the life experience and thus represent a person’s interpretation of his or her own life (see Goodson & Sikes 2001, p.16). This is one reason why life-history research is a form of interpretative research. The transformation of life-story into life history adds a further layer of interpretation, and is the second reason why life-history research is interpretative.

Life-history research is basically retrospective. It focuses on the stories people tell about their ‘lives-so-far.’ This is not to say that life-history research is exclusively interested in the past. Part of the motivation for conducting life-history research is to achieve a better understanding of the past in order to open up possibilities for the future. Life-history research asks questions such as “Who are you? What are you? Why are you? Why do you think, believe, do, make sense of the world and the things that happen to you, as you do? Why have these particular things happen to you? Why has your life taken the course that it has? Where is it likely to go?” (Goodson & Sikes 2001, p.1). The primary unit of analysis for life-history research is the life-story: the narrative – or narratives – one is able to tell about one’s life. The principal form of data-collection is the interview. Life-history researchers also make use of other forms of data-collection, such as writing and group-work (see Dominicé 2000), often followed-up by further interrogation through interviews or writing-tasks.

The crucial stage in life-history research concerns the transformation of life-stories into life histories. This involves the move “to account for historical context” which, as Goodson and Sikes argue, is a “dangerous move, for it offers researchers considerable colonizing power to ‘locate’ the life story with all its inevitable selections, shifts and silences” (Goodson & Sikes 2001, p.17). However, in order to understand a life-story it is adamant “to provide communications that cover the social histories and, indeed, social geographies in which life stories are embedded [because] without contextual commentary on issues of time and space, life stories remain uncoupled from the conditions of their social construction” (ibid.). This is not to suggest that life stories are in themselves completely idiosyncratic and only become shared or public when they are ‘lifted’ to the level of life histories. In the ways in which people tell the story of their life, they already make use of a repertoire of cultural forms, scripts and ideologies. It is therefore “an illusion to think that we capture only the person’s voice when we capture a personal story” (ibid., p.77). Part of the task of transforming life stories into life histories is to make visible the ways in which life stories are a mediation between the personal voice and wider cultural and political imperatives.

All this shows that the life-history approach is a thoroughly contextual method and in this respect already contains an answer to the question of how we can investigate contexts of learning (and living). Such contexts are not simply the environments in which lives are lived. There is at least, as Goodson and Sikes comment, “a crucial

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3 This means that there is a range of ethical issues involved in the conduct of life-history research, particularly around questions of the ownership of stories and the right of interpretation.
interactive relationship between individuals’ lives, their perceptions and experiences, and historical and social contexts and events” (ibid., p.2), which means that the study of context requires a transactional approach (see Dewey & Bentley 1949; Biesta & Burbules 2003). This further means that contextualisation also has to deal with questions about structure and agency, questions about opportunities for action in different ‘fields’ (Bourdieu 1977) or ‘social milieus’ (Vester 1997; Barz 2000). Since life history research is a thoroughly historical approach as well, an approach interested in process, development, transformation and change, it can also shed light on questions about the temporality of learning contexts (and life contexts) themselves, for example through an exploration of generational shifts and patterns (see, e.g., Antikainen et al., 1996).

Interpretative longitudinal life-course research shares many of its characteristics with life history research. Both are forms of interpretative research, both use interviewing as their prime mode of data-collection, both focus on the stories people tell about (aspects of) their lives, both have to deal with questions about the interpretation of stories and issues of context, structure and agency and the ethical issues involved in exploring people’s lives, and both are aimed to understand the temporality of learning, the fact that learning takes time and changes over time. The main difference between the two approaches lies in the fact that life history research is primarily retrospective while interpretative longitudinal life-course research is focused on ‘real time’, i.e., on the (ongoing) present. Whereas the main purpose of the life-history approach is to look back and build up a retrospective understanding of a ‘learning live,’ life-course research aims to capture what we call the ‘present-in-process.’ There is a further difference between the two approaches, in that life history research usually covers a longer time span than life course research, though this is not a matter of principle but a practical difference that mainly has to do with the cost and complexity of long-term interpretative longitudinal research.

Interpretative longitudinal life-course research can either be based on repeated interviews with single individuals or with groups or networks of individuals, or it can track (small) case study groups (such has a community learning project or a cohort of adult learners). Because the approach is interpretative, this form of research can provide an in depth understanding of complex interrelationships, it can give a fuller picture than can be obtained through questionnaires, it can help people to explore the tacit, and it can explore the interface between structure and agency in detail. Because this form of research is longitudinal, it can provide a fuller picture than single interviews, it can help to distinguish between the transient and the stable, it adds a longitudinal dimension to studies of processes such as learning itself, career choice, life changes, etcetera. It can track changing perceptions and dispositions and is generally suited to explore periods of transition and change as well as periods of stability and continuity. Unlike longitudinal life-course research that makes use of repeated questionnaires, interpretative life-course research is expensive if either the sample is large or the timescale long. This means that in practice this form of research has to work with smaller samples and over a relatively short period of time, also to keep the task of systematic data-analysis manageable.4 As a result, interpretative

4 It has to be emphasised that Learning Lives is an exception, in that it has a relatively long period of data collection and a relatively large group of participants. Still, from a statistical point of view, the sample is small and the cost of the project already goes well beyond what is normally available for this kind of research. We are aware, in other words, that Learning Lives is also unique for these reasons.
longitudinal life-course research is less good at identifying macro-patterns of change and transformation. It is, in other words, less good at understanding the temporality of learning contexts.

For all these reasons we believe that interpretative longitudinal life-course research should maximise the strengths of the approach, rather than to be bogged down too much by problems it cannot solve anyway. This is, for example, why the sample for interpretative longitudinal life-course research should be purposive, rather than statistically representative, and should focus on variety, with inclusion of both ‘normal’ and ‘unusual’ cases (a distinction which can only be made after at least one round of interviewing).

Two final observations. Both approaches are based on the stories that people tell about their lives, either their lives ‘up-to-now’ or their ‘lives-in-process.’ This immediately raises questions about the reliability of the accounts people give of their lives. While part of the solution may lie in additional data-collection and documentation, it is important to acknowledge that the very way in which people are able to story or narrate their lives is itself an important source of information for research. The fact that participants may tell stories that are blatantly false says something about the way in which they are able to make sense and learn from their lives as well. What is important, therefore, is not only the content of the stories people tell, but also the way in which they are structured and narrated. Some stories will be coherent and smooth; others will be messy and inconsistent, and if we should worry about this at all, we should probably be more worried about the former presentations than about the latter. We also shouldn’t forget that the narration of one’s life is only one way to represent one’s life and make sense of it. Overreliance on stories and the ability to tell stories may introduce a bias in the research towards those who are comfortable with narrative modes of representation (which often, though not always, are based upon a linear conception of time, rather than a circular view). All research that is based on stories needs to be aware of this and should, ideally, explore other ways of representing and make-meaning of one’s life (such as photo-elicitation methods, a ‘life in pictures,’ drawing or drama).

The interest of the Learning Lives project in identity and agency is also important in relation to understanding what life stories are. While there may be a tendency to think of life stories as descriptions of the life-course (retrospectively or real time), we can also think of identity as a story we can tell about our lives, a story about ourselves living our lives. Identity is, in other words, not just an analytical category that is applied from the ‘outside,’ so to say. The story of one’s lives is one way to narrate one’s identity, to articulate one’s sense of self. Similarly, the story of agency may not only be important for understanding the learning biography, but may well be an important aspect of how a learning life is lived. It is conceivable that it makes a huge difference for our current actions and decisions whether we think of our life ‘up-to-now’ as a life in which we have been able to make a difference, in which we have been able to ‘act’ (see Biesta 2004b) and be an agent of our lives, or whether we narrate our life as something that has happened to us, without much opportunities for influence of direction. Irrespective of whether such stories are true, the interpretations they reveal are likely to have real effects.
Combining Life-History and Interpretative Life-Course Research

It may seem that life history and life-course research can easily be combined. One approach deals with the past and the other with the ongoing presence, so that it might be argued that together they can seamlessly cover the whole life span or at least major parts of it. There are, however, several reasons why the combination of the two approaches is not as straightforward as it may seem. In this section we will focus first on the way in which the present and the past interact (or ‘interpenetrate’) in the combination of the two approaches. This reveals that there is more ‘present’ in life-history research and more ‘past’ in life-course research than what might be expected at first sight. Acknowledging this is particularly important for data-analysis. Secondly, we discuss the implications of combining the two approaches for data-collection, since it is here that – at least in the present stage of the project – most of the problems of combining the two approaches become visible.

The Present and the Past

Life-history research relies on the ways in which adults are able to reconstruct their past through the narration of their life story. Such stories are not an objective account of the facts of one’s life. Life stories are “lives interpreted and made textual” and should therefore be seen as “a partial, selective commentary on lived experience” (Goodson & Sikes 2001, p.16). Life-history research does not study lives themselves but rather “texts of lives” (Freeman 1998, p.7, quoted in Goodson & Sikes 2001, p.16). Given that the life story is the current interpretation of one’s past, the way in which a life is storied and narrated will crucially depend on the present. The ‘now’ is, in other words, always present in one’s story of the past. This is not to say that each different ‘now’ will produce a completely different life story. But people do adjust their interpretation and evaluation of their past in the light of new experiences. Current success, for example, may lead to a quite different account of one’s past than current failure. It is for this reason that life-history research needs to have an understanding of the situation from which the past is reconstructed and narrated. While good life-history research will take the importance of the presence into account, life course research with its emphasis on understanding the ongoing present can add significantly to the understanding of the position from which the life story is being told.

It is not just the present situation which influences one's understanding of the past. The way in which people understand and articulate their present situation is important as well. It is, in other words, not just the ‘now’ that is always present in one’s story of the past; it is also one’s story of the ‘now’ that impacts on one’s story of the past. This is where interpretative life course research can add even more to a life history approach, because of its emphasis on understanding the ongoing present. Interpretative life course research cannot claim to be more objective than life history research, because both have to deal with “lives interpreted and made textual.” But through its detailed understanding of the stories people tell about their ongoing lives, it can contribute to a better grasp of how such stories and current ways of understanding impact on how people make sense of and story their past.

Just as the present and our understanding of the present influence our stories and interpretations of the past, the past also impacts on the present. Although we do not want to espouse determinism and are aware that life is characterised both by
continuity and discontinuity, past events do both enable and restrict our opportunities to act in the present. In this respect we can say that the past is present in the ‘now.’ But again it is not only the way in which the past enables and restricts what is possible in the present that is important. The past also influences our understanding of the present and our ability to articulate and narrate the present, just as our stories of our past and our ability to make sense of our past, influence the present and the stories we tell of it. This is where life-history research can add significantly to the real-time understanding generated by life-course research, in that it can help to understand the past and the ways in which people’s understanding of the past impact on the present.

For all these reasons we cannot simply think of the combination of life history and interpretative life-course research as a process in which one approach deals with the past and the other with the ongoing present. Since both approaches are forms of interpretative research that have the interpretations adults give of their lives as their object of study, past and present do not exist objectively and separately but constantly ‘interpenetrate’ each other. The present and our stories of the present influence our stories of the past, the past influences the present and our stories of the present, just as our stories of the past influence the present and our stories of the present.

One further complicating factor has to do with the impact of the research process itself on the ways in which lives are narrated and interpreted. Engaging in life history and life-course interviews is likely to result in a more active and reflexive relationship with one’s past and current life. This may impact on the way in which participants understand, interpret and narrate their lives, in that participation in the research process is likely to create a heightened awareness of one’s life. It may also impact on the lives themselves. While such impact may be beneficial – some life-history work with adults is precisely aimed at using the approach to influence the lives of participants in a positive way (see Dominicé 2000) – we shouldn’t deny the fact that telling the story of one’s past and present life can be a traumatic experience.

Data-Collection: The Life-Story Interview

As we mentioned above, one of the key-questions in terms of data-collection is if it is possible to use one and the same data-collection process for the two different approaches. Although both approaches aim to collect life-stories – and for this reason we refer to the interview in the Learning Lives project as the life-story interview – there are some obvious differences. Life-history interviews are retrospective, they look back and try to build up an understanding of the life ‘up-to-now.’ Life-course interviews focus on the present and aim to capture the life ‘in-process.’ Life-history interviews are generally more open and ‘relaxed’ and basically focus around one question or invitation: “Tell me about your life.” Life-course interviews require more structure and focus, since they aim to track specific processes over time. Although life-course interviews can be more or less open-ended, depending on the purposes of the research, they always have to keep track of changes and transformations from one interview to the next, which means that even in quite open-ended life-course research the first interview will already set at least part of the agenda for the interviews to follow. Thirdly, while life-history interviews are generally circular in that a series of interviews is meant to ‘dig deeper’ and build up a more detailed and comprehensive understanding of the life-story, life-course interviews are predominantly linear in that the purpose of repeated interviews is to document change and continuity over a period of time. Finally, life-history research only requires a limited number of interviews
(although in principle always more than one), while life-course research needs a longer series of interviews (at least three, and as many as is necessary to cover the period of data collection).

This is not to say that both approaches to interviewing are completely different and incompatible. Although life-course interviews focus on the present, they need to encourage participants to look backwards and forwards as well. The life-course interview not only aims to understand and document the current situation, but needs to be able to locate the first and subsequent interviews in the ongoing life of the participant. In this respect a life-history interview can provide an excellent starting point for a series of life-course interviews (although most life-course research would prefer to begin with an exploration of the present situation). Similarly, a life-history interview aims to document and understand the past, but it needs to do so – as we have argued – with a clear understanding of the present from which the past is storied and interpreted. This is where the life-course interview can help to clarify the participant’s current situation. A series of life-course interviews can potentially do this in an even more sophisticated manner, since it can relate ongoing events and understandings in the life in-process to the ways in which, in subsequent life-history interviews participants make sense of their life up-to-now.

We believe that the main strength of combining the two approaches lies precisely in the way in which each can contextualise the other in the way described here. The difficulty is to do this in one and the same interview and to design data-collection in such a way that both life history and life-course data are generated and collected. This, so we wish to emphasise, will always involve compromise and bears more resemblance to a balancing act where at one point in time one approach will be more dominant and at another point in time the other. In terms of design we have addressed these issues first and foremost by deciding to conduct one ‘pure’ life-history interview with all participants at the start of the project. A second interview, shortly to following the first one and also with all participants, is meant for further probing and clarification of the life history. For some of our participants, the ones who will be included in our full or short life history sub-sample, subsequent interviews (a maximum of between 3 and 8) will allow for deeper exploration of the life-story so as to build up a life history. For those participants in our ‘life-course’ sub-sample the second interview will begin to introduce questions that allow for a connection to subsequent real-time tracking of their learning biographies. While the actual ‘dynamics’ of interviewing may well show much overlap, there will thus be a difference in emphasis between life-story interviews that focus primarily on building up a life-history and those that focus primarily on real-time life-course tracking. Our interviewers, however, are aware of the complexities of the overall project and will, of course, utilise opportunities to explore relevant life history and life-course aspects in their interviews as and when they occur.

**Conclusions**

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5 It is not inconceivable that a critical incident, picked up at some point in a series of life-course interviews, will result in a complete revaluation of one’s past and possibly even in a different life-story. Although we also shouldn’t underestimate the impact of incremental change in the ways in which people understand and make sense of their lives.
The main challenge of the Learning Lives project lies in the combination of life history and life-course research within the context of a relative large-scale longitudinal study. In this paper we have focused on issues arising from the combination of life history and interpretative longitudinal life-course research. Although there are many similarities between the two approaches which reveal that they are not incompatible per se, and although we have highlighted the ways in which the combination of the two approaches will result in a more encompassing and more detailed understanding of the learning biographies of adults, we have also shown that there are difficulties in combining the two approaches, particularly at the level of data-collection. From our discussion it has become clear that the combination of life-history and life-course research is precisely that: it is a combination of two approaches, and not an integration of the two approaches in a new, seamless methodology for researching lifelong learning. The combination of the two approaches requires compromises from both sides. We do believe, however, that such compromises are possible and overall result in a more interesting and sophisticated approach to understanding adults’ learning biographies than what would have been possible by using only one of them. What we haven’t explored in much detail in this paper yet, are the implications for data-analysis, although we have indicated how past and present interact and interpenetrate in making sense of life-stories through life history and life-course research. In a year from now we should be in a better position to say more about our experiences with data-collection and the emerging analysis of the data collected through the life-story interviews.

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