

# THE LEARNING RECORD: WAKING UP AND GROWING UP

Sometimes we are on a path that does not have a map, milestones, or familiar landscape features. It can be difficult to know, in these deep woods, how far we have come, or where we are. We could even be going in circles. Fortunately, there are teachers and spiritual friends who carry the light. Teachers are trusted guides who know the terrain well; spiritual friends accompany us, encourage us, and cheer us, especially when we most need it.

Still, we can feel lost or uncertain about how our practice is unfolding and what is changing in our lives as a result of our journey. In adulthood, much of our learning is like this, whether in spiritual practice, therapy, social activism, travel—unstructured learning that can be difficult to track and evaluate.

For this reason, the Learning Record was developed, first for children in elementary school, and later expanded up to college-level learning and adult learning. I have adapted it to provide a way for adults to capture moments of experience, reflect on them, and take stock of their development from time to time, as a way of recognizing and appreciating this spiritual and psychological journey of waking up and growing up.

The Learning Record does not tell you what to do, it is simply a way to capture information about your own experience and learning as it unfolds in an organized format, and to help you make sense of that information. It can also be a valuable resource in your work with spiritual teachers.

How you use it, and how often, is up to you. You might make observations at any time—following a meditation session or throughout your everyday life. But observations are very brief—a snapshot of a moment, most helpful in showing trends over time or obstacles overcome, so we recommend at least two a week. As with Zazen, continuity of practice is most useful.

The Learning Record is organized in sections so that you can easily find the different aspects of your experience:

**Part A** provides some background at the start about your development up to this point. It also has a section for your aspirations and intentions for this particular experience (class, spiritual practice, therapy, and so on). It is completed at the very beginning.

**Observations** are very brief snapshots of your immediate experience, generally captured within 24 hours so that they are fresh. Just a sentence or two are all you need here; we provide a kind of framework as a guide, which highlights some aspects of experience, but feel free to follow your own observations.

**Samples of Work** are longer reflections, or anything related to your learning process: poems, art, photos, lists, stories, and so on. You might describe a particular difficulty or obstacle you face in your practice, or questions that arise in the midst of it. Feel free to include anything that you have created that provides a view of your learning.

**Part B** provides a place to take stock of your learning so far, and so we usually suggest that you periodically review your original starting point and aspirations from Part A, your observations and

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samples of work, and reflect on your experience. You will find it helpful, probably to use the dimensions of learning found at the end of the Learning Record as a support for this review. The second section of Part B is usually completed at the end of a class or training, as a way of summing up the whole experience. Again, you may use this section at any point.

**Part C** evaluates your experience in light of your aspirations and intentions. Like Part B, it is in two sections, one for ongoing evaluations in the middle of an activity, and another for summing your experiences up in the end. This is an opportunity to reflect on the value of what you have been learning, how it will serve you and others, how it has impacted your life so far.

Below you will find a downloadable form that you can print or keep digitally. Please be patient and don't be discouraged if you feel resistant sometimes, forget to keep it up, have lapses, and so on. It will still be useful. This process and practice is like zazen. It can be uncomfortable, difficult, or even boring at first, and it's challenging to be consistent, but ultimately it should feel nourishing and supportive of your life.

Many of my students and graduate students returned years later to tell me that they continue to keep a Learning Record, which has been the most valuable thing they learned in my class—how to track and analyze their own development.

So I hope you too find the Learning Record a sturdy support for your own journey of waking up and growing up!

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### NOTE:

There are several ways to organize this Learning Record concept. For print, I suggest a looseleaf notebook with dividers in 5 sections:

1. Contact information, Part A.1 and A.2
2. Observations
3. Work samples
4. Analysis and observation (Interim analysis and evaluation and final analysis and evaluation)
5. Related materials (reader responses, handouts from class, notes, journals etc.)

In a one-year program, if you keep one observation a week, you will need 50 observation pages. However, you may find you would like to make observations more often. Make copies as you need them.

### COMPLETING THE LEARNING RECORD

Please follow the instructions for each section. Here is the sequence:

**Part A. 1 and A.2:** Completed at the start of the course. Please complete these two sections within the first two weeks of the course.

**Mindful Observations:** Ongoing throughout the course. These are intended to help us hone our skills for observing. They provide a framework for focusing and organizing the particular aspects you observed. There is a page of guidelines as a reference for these. Please complete at least one per week, but you may do as many as you wish, and your instructor may have more specific assignments for the observations. It is a helpful practice.

**Work Samples:** Ongoing throughout the course. Include here anything that will serve to illuminate your development during the course: freewriting, journal pieces, photos, poems, blog posts, video, or anything at all that is generated from the work you do for the course.

**Part B.1 and C.1** Completed halfway through the course. These are opportunities to “take stock,” usually somewhere in the middle of the course, workshop, or learning experience, by reviewing all the evidence so far (observations and work samples) and interpreting it (in Part B.1) in the light of the Dimensions of Awakening (found at the end of this set of forms) and your aspirations for learning (in Part C.1), as you expressed them at the beginning of the course in Part A.2. You write a brief (½-1 page) response to the questions in B.1 and C.1.

**Part B.2 and C.2** Completed at the end of the course. These are opportunities to once again review the evidence (observations and work samples) and take stock of your learning. You interpret it (in Part B.2) in the light of the Dimensions of Awakening (found at the end of this set of forms) and your aspirations for learning (in Part C.2), as you expressed them at the beginning of the course in Part A.2. You write a brief (½-1 page) response to the questions in B.2 and C.2.

The results should provide a useful account of your learning over time. You may find it helpful to discuss it with your instructor from time to time, but it is your personal record to use as you wish.

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IF FOUND, PLEASE RETURN TO:

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

CONTACT INFORMATION: \_\_\_\_\_

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NAME: \_\_\_\_\_ Date: \_\_\_\_\_

Instructor/Teacher/Facilitator: \_\_\_\_\_

Teaching or training: \_\_\_\_\_

Taking stock: Prior experiences with meditation, psychotherapy, spiritual practice, or other relevant learning:


Special needs or considerations:

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## Part A1: Reflections on your own development

Take some time to reflect on your own development as a human being up to this point. Focus on positive indicators, capacities, and developments, rather than what you consider your deficits or difficulties or shortcomings. Include any information that might specifically relate to the subject of this particular learning experience (class, workshop, seminar, program, retreat, etc.)



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## Part A2: Aspirations for Development

Take some time to become mindful of your purposes for entering into this learning experience. What are your aspirations for your own learning? What might help or hinder you in realizing your aspirations? What will you need to keep in mind in support of your own learning? How will you monitor or evaluate the learning process in terms of your unfolding aspirations? What relationships will affect the work?

A large, empty rounded rectangular box with a thin black border, intended for the user to write their responses to the questions above.



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## **Part B1: Interim Analysis**

From time to time you will want to take stock and review your learning so far. You can do this whenever you wish, although generally we recommend doing the Part B every few months. Review Part A.1 and A.2, your observations and any work samples you've included in the LR so far. Develop your summary interpretation of your development in terms of the learning dimensions attached. You want to connect your interpretations with specific examples included in the mindfulness observations and samples of work. This will help ground your interpretation in actual evidence.

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A large, empty rounded rectangular box with a thin black border, occupying the central portion of the page. It is intended for the user to write their learning record.

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## Part C1: Interim evaluation

Take some time to reflect on the ways this learning experience is unfolding with respect to your aspirations expressed in part A.2. Are you content and energized about the work? Include here any comments you'd like to add about how your learning process is going, especially concerning:

- Suggestions for yourself, about your own further development.
- Suggestions for others—teacher(s) or leader(s)—that you believe will support your development.
- You may want discuss this page with your teacher(s), or send along your suggestions.



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## Part B2: Final Analysis

This section is usually completed at the end of a class, but you may use it at any time that you feel some part of your work is complete. Review Part A.1 and A.2, the interim analysis and evaluation, your observations and any work samples you've included in the LR. Write a summary of your development in terms of the dimensions of learning attached below. You will want to connect your interpretations with specific examples from the mindfulness observations and samples of work.



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## Part C2: Final evaluation

Take some time to reflect on the ways this learning experience has unfolded with respect to your aspirations for it in part A.2. Do you feel your aspirations for this work have been realized? Include here any comments you'd like to add, especially concerning:

- Reflections on your learning experience in the course.
- Any suggestions for the instructor or leadership for future teaching or future offerings.
- You may want to share this page with your teacher(s)



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Comments by readers. Reader's name: \_\_\_\_\_

If you share your Learning Record with other readers, such as your teacher, fellow students, or anyone else, make copies of this blank page so each reader can provide comments for you.



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Mindfulness Practice. Guidelines and examples for mindful observations. These are some suggestions for what you might include in your observations. In any event, try to capture just what you *actually* observed. Different examples are below.

Please note, you may not have all spaces filled. That's perfectly fine. Just set down what you actually noticed. These are brief, one to three sentence notes. Make copies of the blank form as needed.

Observation for \_\_\_\_\_ Sunday, June 13, 2010 \_\_\_\_\_ (date)

<p><b>Form:</b> What was the physical aspect of what you observed? Stick with what might be observed in terms of physical forms and their interactions. Examples: <i>My car hit a light pole. My dog was lying in the sun. I sat down at the computer. My friend arrived late and breathless.</i></p>	<p><b>Questions or reflections:</b> Here you might raise any questions you have about what you observed, or reflect on it. This is not the space for an extended meditation on the observation: however, a more extended reflection could certainly become part of the work samples collection. <i>How much of my time do I spend worrying about things that never happen? I never seem to notice physical sensations. I wonder how I can become more aware of them? These thoughts have an old, familiar, shopworn quality. I think I shrink from relationships because I am afraid of doing or saying the wrong thing. Could I try a little experiment to find out?</i></p>
<p><b>Sensations:</b> What (if any) sensations did you observe? Examples: This is a very immediate, basic reaction: Attraction, aversion, neutral. <i>I was drawn toward it. I shrank away. I was numb with shock. I had no reaction.</i></p>	
<p><b>Perceptions:</b> What sensory perceptions did you observe? Examples: <i>The car fender was folded like origami. My eye was caught by a flight of herons. I heard a mockingbird outside the window. The skin of the orange was dimpled and smooth. His pupils had flecks of green and the edges were dark blue.</i></p>	
<p><b>Thoughts and emotions:</b> What thoughts or emotions did you observe? Examples: <i>Suddenly I felt afraid to open the door. He shouldn't have left them here. Why am I always so confused?</i></p>	
<p><b>Consciousness:</b> What did you notice about the underlying quality of the consciousness? It might be agitated or calm, swift or slow-moving, dark or angry or happy, expansive or narrow, muddled or clear, for example. Examples: <i>All of this was happening but I was unconcerned about it. I was jittery and on edge. My general annoyance erupted into anger.</i></p>	
<p><b>Relationality:</b> What was the relational quality of what you observed? Did you notice how your activity or interactions affected the connections in the situation? Did they reflect some degree of healthy or unhealthy attachment or attunement? Did the interactions and connectedness move relationships toward more freedom, compassion, curiosity, and intimacy? Examples: <i>She looked as though I had slapped her. He calmed down and breathed a sigh when he heard what I said. We started laughing at the same time. She stared out the window and would not speak to me. The big tree began to feel like an old friend.</i></p>	

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MINDFUL OBSERVATIONS: *(Make copies as needed)*

Observation for \_\_\_\_\_ (date)

Form	Questions or reflections
Sensations	
Perceptions	
Thoughts and emotions	
Consciousness	
Relationality	



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Below are several different ways you might analyze your own development, your waking up and growing up. They have been drawn from our Buddhist tradition, from the work of Dan Siegel in interpersonal neurobiology, and from the Learning Record itself, based on thousands of hours of observations by teachers and educational researchers.

### DIMENSIONS OF WAKING UP AND GROWING UP: BUDDHIST TRADITIONS

**Wisdom:** "Wisdom is not a matter of knowing about the nature of things or realizing the cessation of unhealthy influences, but of responsive virtuosity. Huineng asks, 'If sitting in meditation without moving is good, why did Vimalakirti scold Sariputra for sitting in meditation in the woods? If the function of meditation is wisdom, how can meditation consist of sitting alone in the forest, absorbed in contemplation?'" (Hershock, Chan Buddhism, 103-04)

**Compassion:** Compassion is the capacity for "being with," the recognition of suffering together with a fearless optimism and commitment to its relief. The activity of liberating intimacy and care.

**Spontaneity:** Social virtuosity, creativity, and imagination, liberating improvisation. Independent of conventions, fixed perspectives, approval of others, or pre-existing frameworks.

**Relationality:** The capacity for-wholesome, wise, and compassionate thoughts, words, and actions in relating with others, and for cultivating this capacity in others. Empathic awareness of another's perspective. The potential and ability to be intimate with all things.

**Openness and curiosity:** Liberating vulnerability. Unhindered by preconceptions or expectations.

**Equanimity:** The capacity to fully meet all circumstances, experiences, and beings with clarity and stability; liberating ease.

**Skillful means (upaya):** The capacity to use skillful means for ending suffering and for the liberation of self and others.

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### QUALITIES OF A HEALTHY SELF-SYSTEM: DAN SIEGEL

Dan Siegel's set of the qualities of a healthy complex system, as they map onto these dimensions:

Flexible (openness and curiosity)

Adaptive (upaya)

Coherent (wisdom)

Energized (spontaneity)

Stable (equanimity)

Siegel writes: The ancient and universal practice of mindfulness has been shown recently to improve physiological, mental, and relational well-being. Mindfulness is often thought of as a way of being aware of one's present moment sensory experience without judgments. An Interpersonal Neurobiology (IPNB) exploration of mindful awareness suggests that mindfulness can be considered a relational process in which you become your own best friend. The social circuitry of the brain is harnessed by mindful awareness practices that promote health in our minds, brains, and relationships. He notes nine functions of mindfulness and healthy human functioning that are relational:

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An intriguing overlap of several independent domains of knowledge illuminates this relational aspect of mindfulness. The research outcomes for mindfulness correlate with the integrative functions of the prefrontal cortex; and to a large degree they are consistent with the scientifically established results of secure parent child relationships. Furthermore, this same set of functions is a common wish list for psychotherapists in describing mental health. And finally, spiritual teachers and community leaders have suggested that this list overlaps with thousands of years of teachings from tribal elders about the nature of wisdom.

1. **Body regulation:** coordination of the “brakes” and “accelerator” functions of the nervous system
  2. **Attuned communication:** the capacity to relate to or coordinate with another interactively
  3. **Emotional balance:** capacity of limbic areas to be allowed to have enough activation so that life has meaning and vitality but not so much that life becomes chaotic.
  4. **Response flexibility:** the ability to vary responses depending on circumstances, to pause before reacting.
  5. **Empathy:** the capacity to imagine what might be going on inside someone else
  6. **Insight:** self-knowing awareness
  7. **Fear modulation:** the capacity to recognize when fear is an appropriate response and regulate it
  8. **Intuition:** the body’s wisdom, registered from neural networks in the viscera
  9. **Morality:** The ability to imagine and act on what is best for the whole, not just oneself, even when alone
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### DIMENSIONS OF LEARNING: FROM THE LEARNING RECORD PROJECT

Learning theorists have argued that learning and development are not like an assembly-line which can be broken down into discrete steps occurring with machine-time precision, but an organic process that unfolds in complex ways according to its own pace and rhythm. Teaching and learning occurs in complex ecosystems, dynamic environments where teachers, students, materials and supplies, texts, technologies, concepts, social structures, and architectures are interdependently related and interactive.

Using the Learning Record, we are actively searching for, and documenting, positive evidence of a person's development across these dimensions: *confidence and independence, knowledge and understanding, skills and strategies, use of prior and emerging experience, critical reflection, and originality or creativity*. These dimensions cannot be "separated out" and treated individually; rather, they are dynamically interwoven. Our goals for a particular experience should describe a trajectory of learning across multiple dimensions, and our measurements should be able to identify the paths taken by learners, and their progress from their individual starting points along that trajectory.

Individually, learners can expect to make progress across these dimensions:

#### **Confidence and independence**

We see growth and development when learners' confidence and independence become congruent with their actual abilities and skills, content knowledge, use of experience, and reflectiveness about their own learning. It is not a simple case of "more (confidence and independence) is better." In a science class, for example, an overconfident student who has relied on faulty or underdeveloped skills and strategies learns to seek help when facing an obstacle; or a shy student begins to trust her own abilities, and to insist on presenting her own point of view in discussion. In both cases, students are developing along the dimension of confidence and independence.

#### **Skills and strategies**

Skills and strategies represent the "know-how" aspect of learning. When we speak of "performance" or "mastery," we generally mean that learners have developed skills and strategies to function successfully in certain situations. Skills and strategies are not only specific to particular disciplines, but often cross disciplinary boundaries. In a writing class, for example, students develop many specific skills and strategies involved in composing and communicating effectively, from research to concept development to organization to polishing grammar and correctness, and often including technological skills for computer communication.

#### **Knowledge and understanding**

Knowledge and understanding refers to the "content" knowledge gained in particular subject areas. Knowledge and understanding is the most familiar dimension, focusing on the "know-what" aspect of learning. In a psychology class, knowledge and understanding might answer a wide range of questions such as, What is Freud's concept of ego? Who was Carl Jung? What is "behaviorism"? These are typical content questions. Knowledge and understanding in such classes includes what students are learning about the topics; research methods; the theories, concepts, and practices of a discipline; the methods of organizing and presenting our ideas to others, and so on.

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## **Use of prior and emerging experience**

The use of prior and emerging experience involves learners' abilities to draw on their own experience and connect it to their work. A crucial but often unrecognized dimension of learning is the capacity to make use of prior experience as well as emerging experience in new situations. It is necessary to observe learners over a period of time while they engage in a variety of activities in order to account for the development of this important capability, which is at the heart of creative thinking and its application. With traditional methods of evaluating learning, we cannot discover just how a learner's prior experience might be brought to bear to help scaffold new understandings, or how ongoing experience shapes the content knowledge or skills and strategies the learner is developing. In a math class, students scaffold new knowledge through applying the principles and procedures they've already learned: algebra depends on the capacity to apply basic arithmetic procedures, for example.

## **Reflection**

Reflection refers to the developing awareness of the learner's own learning process, as well as more analytical approaches to the subject being studied. When we speak of reflection as a crucial component of learning, we are not using the term in its commonsense meaning of reverie or abstract introspection. We are referring to the development of the learner's ability to step back and consider a situation critically and analytically, with growing insight into his or her own learning processes, a kind of metacognition. It provides the "big picture" for the specific details. For example, students in a history class examining fragmentary documents and researching an era or event use reflection to discover patterns in the evidence and construct a historical narrative. Learners need to develop this capability in order to use what they are learning in other contexts, to recognize the limitations or obstacles confronting them in a given situation, to take advantage of their prior knowledge and experience, and to strengthen their own performance.

## **Creativity, originality, imagination**

As learners gain confidence and independence, knowledge and understanding, skills and strategies, ability to use prior and emerging experience in new situations, and reflectiveness, they generally become more playful and experimental, more creative in the expression of that learning. This is true not only in "creative" domains such as the arts, but in nearly all domains: research, argumentation, history, psychology. In all fields the primary contributions to the field are the result of creative or imaginative work. This optional dimension may be adopted by teachers or schools to make explicit the value of creativity, originality, and imagination in students' development and achievement. Among other things, it recognizes the value of creative experimentation even when the final result of the work may not succeed as the student may hope.

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## WORK SAMPLES

What are work samples?

Work samples might be any kind of thing: notes, journal entries, prompts provided by the workshop or training leaders or teachers, poems, reflections, questions, written articles, photos, works of art, music, or responses to talks or activities that reflect something about your learning, your aspirations, or this journey. They are gathered in a portfolio (called Work Samples in the original student LR, but perhaps something like “Related material” in this LR), that accompanies the LR. You may also want to save in another section any handouts or readings provided, or selections of others’ work you wish to include.

LRs might be shared and commented on by other people in a training, in part or as a whole. There might be a kind of “powers of three” exercise with the LR, or some kind of sharing with the whole group on a voluntary basis. There should be an opportunity for a thoughtful read by one or two other people at least, at some point. You might also wish to share your LR with a teacher, therapist or other guide.