LIBERTY UNIVERSITY
JOHN W. RAWLINGS SCHOOL OF DIVINITY

GREAT LEADER, GREAT LEARNER: SHEPHERD -TEACHERS, SELF-DIRECTED LEARNING, AND THE PREACHING MOMENT IN SMALL SOUTHERN BAPTIST CHURCHES

A Dissertation Presented in Partial Fulfillment

Of the Requirements for the Degree

Doctor of Philosophy

by

Matthew Thomas Gowin

Liberty University, Lynchburg, VA

2024

GREAT LEADER, GREAT LEARNER: SHEPHERD–TEACHERS, SELF-DIRECTED LEARNING, AND THE PREACHING MOMENT IN SMALL SOUTHERN BAPTIST CHURCHES

by Matthew Thomas Gowin

A Dissertation Presented in Partial Fulfillment

Of the Requirements for the Degree

Doctor of Philosophy

Liberty University, Lynchburg, VA

March 20, 2024

APPROVED BY:

Brian Pinzer, PhD, Dissertation Supervisor

Gary Bredfeldt, PhD, Second Reader

ABSTRACT

The purpose of this qualitative multiple-case study was to explore the influence of the shepherd–teacher's learning attributes, informed by adult learning theory, on the preaching moment within a conservative Southern Baptist congregation. Malcolm S. Knowles offered the theory guiding this study in his concepts of andragogy and self-directed learning. Knowles introduced an educational model that emphasizes adult learning and primarily self-directed learning. The study observed whether being a self-directed learner impacts the shepherd–teacher's instructional activities, including preparation and delivery. The study addressed an identified gap between adult learning theory and homiletics. The multiple-case study started by surveying pastors with the Self-Directed Learning Readiness Scale. The final cases consisted of small (generally less than 150 congregants) Southern Baptist churches in suburban or rural contexts. The data were then triangulated with semistructured interviews of the pastors, document analysis of sermon transcripts, and focus groups with participants in the preaching moment. Content analysis, cross-case analysis, and examination of rival explanations were used to explore how the pastor's attributes associated with self-directed learning shaped the preaching moment, including preparation, presentation, and perception by the hearers. The study discovered a capacity for self-directed learning is imperative for pastoral ministry. The practices associated with self-directed learning were seemingly intuitively practiced in biblical exegesis. The skills were especially relevant to discerning the learning needs of the congregation. The perception of the shepherd–teacher as a peer in the learning experience created credibility and modeled learning behaviors for the congregation. The study concluded with practical observations that might influence the equipping of shepherd–teachers and their practice of the ministry of the Word.

Keywords: andragogy, self-directed learning, preaching, teaching, adult education

Copyright © 2024. Matthew Thomas Gowin. All rights reserved.
Liberty University has permission to reproduce and disseminate this document in any form by any means for purposes chosen by the University, including, without limitation, preservation, or instruction.

Dedication

This research is dedicated to the faithful shepherd–teachers who serve the Church to the honor and glory of Jesus. I pray this study recognizes their labor in concert with the Spirit that equips them.

Acknowledgments

I want to celebrate the partnership through encouragement and patience offered by my helpmate, Erin, and our family throughout this journey. Without her faithful support, the work would never have been completed. Her encouragement set the tone for our family. Our young children—Isaiah, Abigail, Katharina, and Jacob—patiently accommodated time committed to an intense focus on research and writing while eagerly awaiting the day Daddy would finish the "book." Their selfless encouragement is a mark of love, and I am all the better for it.

Sincere appreciation belongs to the many faculty who have coached, facilitated, and educated along the way. A special gratitude is reserved for Dr. Brian Pinzer, who never hesitated to reach out and provide a word of patient encouragement. His poignant feedback and enthusiasm for the topic kept the project moving forward.

I am grateful for the thoughtful work of Dr. Gary Bredfeldt. His scholarship and emphasis on teaching in the local church fueled my interest in this topic. More, I benefited from his kind guidance and thoughtful feedback in communicating my meager effort to contribute to this vital field.

Table of Contents

ABSTRACT....3

Copyright....4

Dedication....5

Acknowledgments....6

List of Tables....12

List of Figures....13

List of Abbreviations....14

CHAPTER ONE: RESEARCH CONCERN....15

Introduction....15

Background to the Problem....16

Theological Background: The Pastor as the Teacher....17

Theoretical Background: Knowles's Adult Learning Theory....18

Functional Background: Leadership and Adult Learning....20

Statement of the Problem....21

Purpose Statement....22

Research Questions....22

Assumptions and Delimitations....23

Assumptions....23

Delimitations....24

Definition of Terms....25

Significance of the Study....26

Summary of the Design....26

Research Sample 27

Methodological Design 27

Proposed Instrumentation 28

Chapter Summary 29

CHAPTER TWO: LITERATURE REVIEW 30

Overview 30

Theological Framework: Adults, Learning, and the Shepherd–Teacher 30

Adults Can Learn 31

Transformation Is the Necessary Result of Learning 34

Biblical Truth Is the Content of Learning 35

Individual Accountability Is the Motivation for Learning 36

Corporate Teaching as the Responsibility of the Shepherd–Teacher 37

Theological Framework Summary 41

Theoretical Framework: Knowles's Adult Learning Theory and SDL 41

Malcolm S. Knowles 42

Andragogy 42

Andragogy in Research and Practice 45

SDL 47

A Tool for Considering Attributes of SDL 51

Theoretical Framework Summary 52

Related Literature 53

Christian Education 53

Homiletics 56

Other Theories of Adult Learning....63

Leadership and Organizational Learning....68

The Rationale for the Study and Gap in the Literature....70

Profile of the Current Study....72

Chapter Summary....73

CHAPTER THREE: RESEARCH METHODOLOGY....74

Research Design Synopsis....74

The Problem....74

Purpose Statement....75

Research Questions....75

Research Design and Methodology....75

Setting....79

Participants....79

Role of the Researcher....80

Ethical Considerations....81

Data Collection Methods and Instruments....82

Collection Methods....82

Instruments and Protocols....83

Procedures....89

Data Analysis....90

Analysis Methods....91

Trustworthiness....95

Chapter Summary....97

CHAPTER FOUR: ANALYSIS OF FINDINGS 99
Overview 99
Compilation Protocol and Measures 99
Demographic and Sample Data 101
Data Analysis and Findings 103
RQ1 103
RQ2 108
RQ3 111
RQ4 115
Evaluation of the Research Design 120
Recruitment 120
Operationalizing SDL 121
Assessing the Learning Environment 122
Chapter Summary 122
CHAPTER FIVE: CONCLUSIONS 124
Overview 124
Research Purpose 125
Research Questions 125
Research Conclusions, Implications, and Applications 125
RQ1 Conclusion 126
RQ1 Theoretical Implication 126
RQ1 Practical Application 127
RQ2 Conclusion 129

RQ2 Theoretical Implication 129

RQ2 Practical Application 130

RQ3 Conclusion 132

RQ3 Theoretical Implication 132

RQ3 Practical Application 135

RQ4 Conclusion 136

RQ4 Theoretical Implication 137

RQ4 Practical Application 138

Summary 140

Research Limitations 140

Further Research 141

Conclusion 142

REFERENCES 144

APPENDIX A: IRB APPROVAL LETTER 152

APPENDIX B: CONSENT FOR PASTOR 154

APPENDIX C: CONSENT FOR FOCUS GROUP 157

APPENDIX D: RECRUITMENT TEMPLATE 160

APPENDIX E: RECRUITMENT FOLLOW-UP TEMPLATE 161

APPENDIX F: SCREENING SURVEY QUESTIONS 162

APPENDIX G: FOCUS GROUP QUESTIONS 163

APPENDIX H: FIELD OBSERVATION NOTES 164

APPENDIX I: CODE PROTOCOL WITH FREQUENCIES 166

List of Tables

Table 1: Rachal's Criteria for Future Andragogical Research 47

Table 2: Argyris's Model I and Model II Theories in Action 69

Table 3: Guided Interview Questions 86

Table 4: Characteristics of the Four Research Sites (Identified by Assigned Site Codes) 102

List of Figures

Figure 1: Practices of Self-Directed Learning Across the Cases 105

Figure 2: Frequencies of Coded Content in Sermon Samples 112

List of Abbreviations

English Standard Version (*ESV*)

Self-directed learning (SDL)

Self-Directed Learning Readiness Scale (SDLRS)

Institutional Review Board (IRB)

Southern Baptist Conservatives of Virginia (SBCV)

Learning Preference Assessment (LPA)

Personal responsibility orientation (PRO)

CHAPTER ONE: RESEARCH CONCERN

Introduction

In the earliest days, the Church was given direction through intentional teaching. The rhythm of the local New Testament church is still marked by the weekly gathering for a time of intentional teaching through the sermon. The task of teaching God's Word is aligned with one of the gifted servants given for the equipping of the church—that is, the pastor–teacher (Eph. 4:11). The sermon is a means of leadership for the churches' under-shepherds – the pastor, or shepherd-teacher. This assertion is parallel with Bredfeldt's (2006) characterization of the "leader–teacher" (p. 14). Bredfeldt (2006) argued:

> The most basic core of biblical leadership is one indispensable, unchanging function of the Christian leader—the task of teaching God's Word with clarity, in its original context, and in a way that is relevant to those whose hearts are open to hear. (p. 14)

The pulpit aspires beyond the transfer of information but calls people to life transformation through submission to the Gospel. Thus, it can benefit from the learning and study pursued in educational psychology and adult learning to make the best use of that teaching moment for the Kingdom's sake. Christian education texts point to transformation into the likeness of Jesus Christ as the aim of spiritual maturity and the end of Christian education. They offer different theories and models as to the processes of learning. However, few speak directly to the teaching ministry of the pulpit. Perhaps it is the sacred nature of the sermon as the moment where God's servant in the presence of God's people declares God's Word in submission to God's Spirit to call the hearers to God's Son that instills trepidation in approaching it with secular theory. However, the significance of the moment should engender a desire to steward the opportunity by making biblically informed use of every bit of knowledge that might increase the effectiveness of the ministry of the Word.

This chapter presents an overall summative framework for the study. The context of the research problem is addressed from both theological and theoretical foundations. These foundations are followed by a presentation of the purpose statement and the related research questions. Assumptions and delimitations are documented to aid clarification of the scope of the study. Attention is given to defining self-directed learning (SDL) while acknowledging the historical difficulty of operationalizing the concept for research purposes. Still, the statement on the significance of this study argues that such research is critical given its potential value to the Church and community understanding of adult learning. The chapter concludes with an overview of the research design.

Background to the Problem

The church is a teaching–learning body whose success rests on the ability of its leaders and members to function as teachers and learners (Bredfeldt, 2006, p. 16). God equipped the church with "pastors and teachers," along with other gifted servants, as leaders in His church to equip His body to carry out the work of the ministry (*ESV*, 2001/2016, Eph. 4:11). One can contend that pastor and teacher are the same office. That is not to say it is a "job" or "career," or even a "profession." Instead, this is the task the Lord has called and gifted a servant to achieve by shepherding His church through the deliberate teaching and proclamation of His special revelation (i.e., the Bible). Developing competence in this call is a matter of worship. One ought to aim to offer oneself as a "living sacrifice" and be "transformed by the renewal of your mind" (*ESV*, 2001/2016, Rom. 12:2). With a biblical view of worship, the desire is to be and do the very best to represent one's love and commitment to Jesus (1 Cor. 10:31, James 1:14). Naturally, what follows is a question related to the vocation of preaching and teaching of the Bible—in particular, the role of the pastor–teacher to function as a teacher and a learner.

Theological Background: The Pastor as the Teacher

There was a presupposition underlying the focus of the study; preaching and teaching are the *primary* tasks of the pastor–teacher in the Church. This assertion is not new. It has been presented by professors of homiletics and pastors who desire to hide in their studies. However, is there a biblical basis to this presupposition? One can contend that the professors and introverted pastors are not without support. In Acts, the apostles desire to expand the servants in the Church. They offer the reason that they must delegate the tasks of caring for the widows to allow for "preaching the word of God" and devoting themselves to the "ministry of the Word" (*ESV*, 2001/2016, Acts 6:2–4). The apostles, who built the Church's foundation, prioritized the proclamation of God's Word. The contemporary pastor–teacher is continuing to build on the foundation established by the apostles. Thus, the contemporary pastor–teacher ought to also focus on the teaching of God's Word.

When Paul expresses the spiritual offices, he describes pastors and teachers. First, the likely conclusion is that these are the same person. One commentary says the Greek construction provides "strong evidence to suggest that this is one and the same person … the pastor–teacher ministered as shepherd of the local congregation, teaching God's word" (Anders, 1999, p. 162). Such is the importance of teaching God's Word that it is invoked as part of the office. The pastor is a teacher. The consistent teaching of God's Word is the means through which the shepherd responds to Jesus's call to "feed my sheep" (*ESV*, 2001/2016, John 21:17). However, the call implies more than the simple transfer of intellectual knowledge.

The term "teacher," or "διδάσκαλος" (didaskalos), is an explicit reference to providing instruction or training to shape the life of a student. One tool says:

> It makes no difference whether the one who gives the instruction is God Himself (Dt. 4:10), the head of the family (Dt. 11:19), or the righteous. The term is always marked by

> the fact that it has a volitional as well as an intellectual reference. (Rengstorf, 1964, p. 137)

The pastor's clear teaching of the Bible should evoke a change in the listener and prayerfully increase their spiritual talents.

The broad scholarly field of homiletics is generally lacking in-depth consideration of learning theory and adult education. Stuart (2011) writes, "Homiletics includes an enormous scholarly arena of its own but has developed largely apart from fields such as learning theory or adult education" (p. 116). He goes on to say that learning theory provides a foundation from which to consider the church service as an educational experience that influences the learner through the sermon and its impact. Although Stuart holds that educational theory is a helpful resource in considering the sermon, he still offers that the intent is not prescriptive. The concepts from educational theory may explain the learning phenomenon but not go so far as to provide practical points for practice and application by the pastor.

In the end, adult learning theory, when synthesized with a thoroughly Christian worldview, is a "central component of a biblically-based, creation-oriented approach to the teaching–learning process" (Mitchell, 2010, p. 133). An intentional approach to the teaching–learning process is necessary as followers of Christ gather to hear from the pastor–teacher in the corporate setting. Adult learning theory can inform the preaching moment if the Church is to make the best use of the occasion to see followers of Christ experience growth and spiritual maturation.

Theoretical Background: Knowles's Adult Learning Theory

Malcolm S. Knowles was not the first to consider the unique approach to educating adults: "The seeds of an approach to adult learning as being different from pedagogy can be found with scholars of antiquity" (Merriam & Bierema, 2013, p. 44). In teaching adults in the

early 20th century, Knowles looked to historical works from social philosophers and behavioral and social scientists. Knowles recognized the philosophical and anecdotal nature of the resources that were available that considered adult learning. His acknowledgment of the absence of comprehensive theory relating to the difference in adult learning fueled Knowles's research (Merriam & Bierema, 2013, pp. 44–46). Knowles would grow in prominence by publishing more than 200 articles and 19 books related to adult education. At the time of his passing, in 1997, Knowles was eulogized as the "father of adult education" (Henschke, 1997, p. 2).

Andragogy

The term "andragogy" was not coined by Knowles. Instead, he adopted it early in his research after hearing the term from a European scholar of adult education. The term "andragogy" would represent the art and science of facilitating adult learning, including encouragement of SDL (Knowles, 1970, p. 38). In his chapter explaining andragogy, Knowles (1970) commits the majority to unpack a series of four initial assumptions. Later, in 1984, he added the fifth assumption to address the learner's motivation and later (e.g., 1990) a sixth assumption tied to a learner's need to know (Merriam & Bierema, 2013, p. 47). For each assumption, there are coinciding technological or practical implications.

Even absent a clear operational definition, the concepts associated with Knowles's andragogy had a broad impact in the field of adult education. Andragogy influenced future adult education scholars to create and establish instruments to measure SDL readiness and attributes (Hiemstra, 2003, pp. 6–7). The influence was especially notable in the fields of graduate education and professional development. Still, the question remains of how the characteristics of Knowles's andragogy fit within a biblical worldview. Additionally, it is worthwhile to explore how these characteristics might influence the seminal moment of corporate teaching in the local

New Testament church context. Knowles (1977) himself saw the relevance, having penned an article for the journal *Religious Education*.

SDL

Knowles's academic interest was refined as he engaged in another emerging theory that addressed adult learning: SDL. Merriam (2001) has written that "Knowles (1975) himself contributed to the self-directed learning literature with a book explaining the concept and outlining how to implement it" (p. 8). Long (1992) offered that "Knowles interest in self-directed learning closely related to the development of andragogical philosophy" (p. 37). SDL is the application of the assumptions of Knowles's andragogy. In this context, andragogy fuels an assertion that "self-directed learning assumes that the human being grows in capacity (and need) to be self-directing as an essential component of maturing" (Knowles, 1975, p. 20). SDL is recognized as instigating "emancipatory learning and social action" (Merriam, 2001, p. 9). This is especially relevant to the Church, which desires to see lives transformed through the powerful work of the Gospel well communicated.

Functional Background: Leadership and Adult Learning

Bredfeldt (2006) noted a trend in scholarship in leadership. He wrote, "Out is the management emphasis of strategic planning and in is a new emphasis on learning, development, and mutuality" (Bredfeldt, 2006, p. 14). He pointed out that contemporary leadership authors have focused on a style of leadership that reflects postmodernity. The environment for leadership has moved to one where "leaders no longer have the answers, but instead create a climate where followers are empowered, collaborative, and freed to pursue shared goals in their own way" (Bredfeldt, 2006, p. 14). This environment very much sounds like the conditions envisioned in connection with Knowles's andragogy and SDL. The change in the leadership environment is not

isolated to the business world but is sure to influence leadership in the Church. The pastor–teacher, in leading the body of Christ, will need to move beyond transferring information toward equipping the congregation for spiritual growth through interaction with God's Word. After all, Bredfeldt (2006) argues, "maximum leadership is achieved through great teaching" (p. 19).

Statement of the Problem

Adult learning theories have the potential to impact how the Church does ministry and teaches the Bible. This benefit includes the corporate teaching of God's Word during the preaching moment. One cursory resource addressing learning theories offers:

> When self-actualizing, andragogical, and conscientizing principles of adult learning are transformed into action, they can contribute to both methodological and structural renewal of the programs and institutions in which they minister. This benefit makes adult learning theory especially applicable in missions contexts where a primary agenda is individual and social change. (Douglas., 2000, p. 569)

Others have also recognized the commonality in goals and practices between adult learning theory and conversations on spiritual formation processes (Beard, 2017, p. 247).

The research problem hinged on the field of homiletics being informed by the developments within adult learning. Knowles (1975) offered, "Most of us only know how to be taught; we haven't learned how to learn" (p. 14). While addressing how people learn, adult learning theory can provide a tool with which to inform the development of the sermon. Does a sermon constructed with an adult learning educational model demonstrate a more significant effect (e.g., influence on culture, attitudes, and action)? The essence of the research problem addressed how pastor–teachers learn and teach, especially during the preaching moment. The core aim was to understand how adult learning theory, primarily SDL, might influence the shepherd–teacher as an effective teacher of God's Word.

Purpose Statement

The purpose of this qualitative multiple-case study was to explore the influence of the shepherd–teacher's learning attributes, informed by adult learning theory, on the preparation, presentation, and perception of the preaching moment within a conservative Southern Baptist congregation. Knowles offered the theory guiding this study in his concepts of andragogy and SDL. Knowles introduced an educational model that emphasized adult learning and primarily SDL. The study attempted to observe whether being a self-directed learner impacts the shepherd–teacher's instructional activities, including preparation and delivery.

Research Questions

RQ1. What awareness do shepherd–teachers have of their process of learning and learning preferences?

RQ2. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDL Readiness Scale (SDLRS), inform their instructional and planning activities?

RQ3. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform the content and delivery of the preaching moment?

RQ4. How does the perception of the shepherd–teacher's attributes of SDL inform a hearer's perception and view of the content and delivery of a sermon?

These questions consider the influence of the capacity for, and exercise of, SDL, considering both the shepherd–teacher and the congregation. This line of questioning follows Knowles's concepts of adult learning (e.g., andragogy) and SDL as a set of assumptions and characteristics rather than a mere instructional process. Long (1992) wrote that "Tough and Knowles were dealing with different dimensions of the teaching-learning transaction. Tough's emphasis was more upon the individual…to the point of almost neglecting the teacher or relegating the learner-teacher relationship to an occasional contact" (p. 38). Knowles focused much more deliberately on the relationship between the teacher and learner (Long, 1992, p. 38).

A focus on the teacher was intended to allow a richer dialogue and more complete understanding of the experience of the teaching–learning phenomena in the preaching moment while considering andragogy and SDL.

Assumptions and Delimitations

This section addresses the assumptions and delimitations of the research study. Creswell (2018) noted that definitions of research methods included two principal components: distinct procedures and differing philosophical assumptions (p. 4). The researcher recognized the influence of a constructivist worldview that shaped the study. The aim was to develop a greater understanding of the complex phenomenon of the preaching moment through the participants' views. However, the end of the research emphasized a desire to influence real-world practice. Creswell (2018) noted this focus as a mark of the pragmatic worldview (p. 9). Beyond the broad constructivist and pragmatic philosophical assumptions were more refined assumptions regarding the research problem and setting.

Assumptions

The researcher acknowledged that philosophical assumptions were present in the design of the research. This study involved a qualitative method that relied on a constructivist approach. The research attempted to gain a deeper understanding of a complex phenomenon (i.e., the preaching moment) by observing and documenting the experiences of the participants (i.e., the shepherd–teacher and congregation; Creswell, 2018, p. 17). Additionally, the research intended to go beyond an academic exercise. A pragmatic view of research influenced the purpose and design. The researcher aimed to influence a real-world practice through increased understanding of the phenomenon. Creswell (2018) has written that a pragmatic worldview allows the

researcher “freedom of choice … to choose the methods, techniques, and procedures of research that best meet their needs and purposes” (p. 10).

The study was undergirded by several assumptions related to the work of the ministry, mainly touching on the preaching and teaching of the Bible during corporate worship in the preaching moment. This research was narrowed to consider the primary corporate teaching time in the church, the preaching moment, or the sermon. Additionally, the breadth of this research was limited to consideration of the andragogical concepts offered by one prominent theorist, Knowles: adult learning theory and mainly SDL. The researcher expected that most, if not all, persons serving as primary teaching pastors in local churches would exhibit some attributes related to SDL. This assumption was based on the weekly work needed to study for, develop, and deliver a sermon. The practice of sermon development itself implies skills associated with SDL. Finally, the researcher approached the study with an assumption that SDL is a positive and desired quality.

Delimitations

The research was expressly focused on those congregations affiliated with the Southern Baptist Convention. This condition was attributable to the researcher’s own church experience and educational background. The final sample only included smaller (less than 150 congregants) congregations in suburban or rural context. All the shepherd-teachers demonstrated an expositional style of preaching. The research was intently focused on the preaching moment rather than the broad spectrum of educational ministries that unfold in the local New Testament church. The research did not emphasize church setting, pastoral education, and tenure. Instead, the researcher used purposive sampling to replicate cases to focus on the phenomenon of the preaching moment in light of the pastor–teacher’s learning preferences. The research did not

intend to establish a measure of effectiveness for the preaching moment or discern how the preaching moment affects hearers' behavior or spiritual growth. Instead, the research pursued only a greater understanding of the experiences in the preaching moment, considering the pastor–teacher's learning preferences.

Definition of Terms

The principles associated with adult learning theory, like most scholarly topics, generated debate and conversation. In the half-century since Knowles popularized andragogy, it has been critiqued. Some have contended whether it could be described as a theory. Others have considered the validity of the assumptions. Merriam and Bierema (2013) wrote, "The actual research in support of these assumptions is mixed at best" (p. 57). Rachal (2002) contended, "This attention is attributable to andragogy's preeminence as the most persistent practice-based, instructional methods issue in adult education" (p. 211). Rachal (2002) documented that the predominant challenge is the absence of an operational definition for Knowles's "andragogy" and, more practically, a criterion with which to identify what procedures constitute andragogical practice.

1. *Andragogy*: The art and science of facilitating adult learning, including encouraging SDL (Knowles, 1970, p. 38).

2. *Self-Directed Learning* (*SDL*):

   > A process in which individuals take the initiative, with or without the help of others, in diagnosing their learning needs, formulating learning goals, identifying human and material resources for learning, choosing and implementing appropriate learning strategies, and evaluating learning outcomes. (Knowles, 1975, p. 18)

   Ultimately, the most significant element in characterizing SDL is the "attitude of the learners" (Knowles, 1975, p. 21).

3. *Shepherd–Teacher*: "One of five gifts given to the Church for leadership by the ascended Lord (Eph. 4:8, 11). Whereas apostles, prophets, and evangelist minister in the Church at large, pastors and teachers serve in the local congregation" (Harris, 1979, p. 367). Harris (1979) has stated the more contemporary use of "pastor," a

Latin term, emanated from the publication of the Geneva Bible, whereas both Tyndale and Wycliff used "shepherd" (p. 367).

4. *Preaching Moment*: The delivery of the sermon. McDill (1999) has written, "It is only in the preaching that an idea, an outline, a manuscript, becomes a sermon" (p. 167).

Significance of the Study

The research problem hinged on the ability of the field of homiletics to be informed by developments in the field of adult learning. The study created an opportunity to redeem contemporary learning in adult education to enhance the effective teaching of the Bible in the preaching moment. The study results can influence the training of shepherd–teachers as they clarify the value of understanding how adults learn in pursuit of proclaiming the Gospel. Additionally, the study might encourage the shepherd–teacher to develop an increased appreciation of the value of continual SDL. The context of the local New Testament church presented an ideal setting in which to test the principles proffered by Knowles. Multiple scholars have observed the inherent difficulty of measuring a theory that discourages tests and grades (Taylor & Kroth, 2009). The Church, too, is averse to pencil-and-paper tests and presents the voluntary adult learner looking for applicable teaching that influences daily life. Additionally, the study brought to light a gap in contemporary literature between those volumes addressing the craft of preaching, Christian education, and scholarship addressing adult learning.

Summary of the Design

The study followed a multiple-case study design and focused on the primary teaching pastor within a local church affiliated with the Southern Baptist Convention, who clearly stated in their doctrinal position a high view on the inspiration, authority, and truthfulness of Scripture.

Research Sample

The sample consisted of voluntary participants, each of whom was the primary teaching pastor (i.e., shepherd–teacher) in a local church associated with the Southern Baptist Convention. Additionally, each participating pastor–teacher was viewed as a gatekeeper and an active participant in the research. The researcher recruited volunteers using a replication model suggested by Yin (2018). Recruitment materials screened by the Liberty University Institutional Review Board (IRB) were disseminated to churches using contact data publicly available via the Southern Baptist Conservatives of Virginia (SBCV) website. Correspondence was addressed to currently serving shepherd–teachers in affiliated congregations. The researcher recruited four shepherd–teachers to form the basis for the case study. The best effort was made to identify congregations similar in size, setting (e.g., urban, rural, or city), and pastoral tenure.

Methodological Design

The study employed a qualitative method—a multiple-case study design. Creswell (2018) wrote, “Qualitative researchers collect data themselves through observing documents, observing behavior, or interviewing participants” (p. 180). Additionally, the researcher relied on multiple sources of data. The researcher identified four cases. Yin (2018) has noted, “Single-case studies can yield invaluable insights, [but] most multiple-case studies are likely to be stronger than single-case studies” (p. 63). The selection of the multiple cases followed Yin’s (2018) direction toward replication rather than sampling logic (p. 121). Multiple sources of data were gathered from the corporate Sunday morning sermon moment within a conservative Southern Baptist congregation. Data were also collected by administering the Learning Preference Assessment (LPA; also known as the SDLRS) to the teaching pastor. Additionally, documentary evidence was collected in the form of sermon transcripts, interview transcripts resulting from interviews

with the participating shepherd–teachers, focus groups with congregants, and field observations notes.

Data were collected from multiple sources and in multiple forms. The researcher gathered qualitative observations as a participant–observer, conducted interviews, conducted focus groups, and examined documents. Documents included sermon notes from sample sermons. The notes were reviewed and compared to identify themes in organization or emphasis. The pastor–teacher delivering the sermon was interviewed one on one to understand the pastor's process of sermon development. Additionally, focus groups were conducted with participants following a preaching moment in each case.

The researcher triangulated different data sources (documents, one-on-one interviews, focus groups, and LPA data) to develop a coherent justification for proposed themes that incorporate validity strategies. Shepherd–teachers who were sampled were provided with the final report and debriefed to discern whether they felt the report was accurate. Yin (2018) and Merriam and Tisdell (2015) provide multiple tactics for addressing construct validity, internal validity, external validity, and reliability in their texts on case study research design. These tactics were employed to evaluate the quality of the research.

Proposed Instrumentation

Data were collected using the LPA, developed by Guglielmino (1978), to understand the shepherd–teachers' learning preferences and discern the attributes associated with SDL. Qualitative research does not generally rely on questionnaires or instruments. Instead, the researcher becomes the critical data collector (Creswell, 2018, p. 181). The researcher also developed and used an interview protocol for semistructured interviews with participating

shepherd–teachers. Additionally, the researcher constructed an instrument to gather notes as a participant–observer.

Chapter Summary

This chapter introduced the opportunity to conduct qualitative research in the form of a multiple-case study to provide practical insight for pastor–teachers in the Church, inform the equipping and training of Church leaders, and fill an identified gap in scholarship between adult learning theory and homiletics. The study built on assumptions related to adult learning influenced by Knowles—that is, andragogy and SDL. The multiple-case study required the participation of shepherd–teachers to allow observation of the phenomenon of the preaching moment. However, the setting of the research provided an ideal context for studying andragogy and SDL. Multiple sources of data were readily observable in the preaching moment. Additionally, the study had the advantage of a validated tool with which to explore characteristics associated with SDL. The ensuing chapter considers the theoretical and theological framework for the study along with relevant existing literature.

CHAPTER TWO: LITERATURE REVIEW

Overview

The study presented an opportunity to gather helpful knowledge for application in the local New Testament church. This benefit coincided with the potential to contribute to the broader academic field of adult learning theory and Christian education. The blending of these two opportunities shaped the framework of this chapter. The multiple-case study focused on the characteristics of SDL as displayed by the shepherd–teachers of local New Testament churches to explore the experience of the preaching moment with respect to both content and delivery. However, the setting of the local New Testament church required consideration of theological concepts. Therefore, an effort was made here to consider the theoretical approaches of andragogy and SDL in light of biblical testimony. The research built on the scholarship of Knowles. The theoretical foundations of the study, addressing both andragogy and SDL, are presented in this chapter. The complexity of the phenomenon of the preaching moment required consideration of the wealth of scholarship addressing adult learning theory, Christian education, the confluence of leadership and learning, and homiletics. Thus, the most substantive portion of this chapter is committed to reviewing relevant literature. A review of the current literature failed to identify any texts that considered implications for the moment of corporate teaching or preaching that might be drawn from adult learning theory.

Theological Framework: Adults, Learning, and the Shepherd–Teacher

This study aimed to develop a practical understanding of the influence of the shepherd–teacher's learning preferences on the development of the content of the sermon moment, as informed by the concepts of Knowles's model of andragogy. Given that aim, it was only fitting to consider how these assumptions correspond to a theologically and biblically informed

anthropology. The discussion here is not a complete consideration of all that the Bible and theology have to say about humanity and its capacity to learn. Instead, the aim was to highlight areas that support or challenge concepts related to andragogy and the presuppositions that informed this research. The following section presents biblical conclusions that indicate adults can learn, with the result of transformation, when the substance of learning is biblical truth. Additionally, an adult is responsible for their learning and motivated by individual accountability before their creator—God. However, this does not mitigate the privilege and responsibility of the shepherd–teacher to present doctrinally sound and engaging corporate teaching for the body of Christ. Additional attention was given to the biblical concepts of teaching and preaching in connection with the responsibility of the shepherd–teacher.

Adults Can Learn

The study of adult learning theory began with the pursuit of empirical evidence that adults could learn (Knowles et al., 2015, pp. 36–37). Knowles's andragogy emphasizes the individual human capacity to learn. Andragogy emphasizes more than the transfer of intellectual material. Instead, the exercise of learning instigates change. The Bible concedes that learning, even as an adult, is a human capacity. Additionally, a biblical view contends that the end of learning is not simply the possession of knowledge, but transformation.

Romans 1:20

In his opening word of his letter to the Romans, Paul writes, "For his invisible attributes, namely, his eternal power and divine nature, have been clearly *perceived* [emphasis added], ever since the creation of the world, in the things that have been made. So they are without excuse" (*ESV*, 2001/2016, Rom. 1:20). The verb rendered here as "perceived" shares the very same root as the word Paul used in Romans 12:2 for "mind." One tool declares, "Here, then, νοεῖν can

denote only a purely intellectual process, attentive thought which takes note of what is seen and by means prevelation, God has made himself known" (Behm & Wurthwein, 1964, p. 950). This passage, a reference to natural revelation, speaks to those without the privilege of special revelation. Moo (1994) wrote, "All human beings have the capacity to receive such revelation because they continue to bear the divine image" (p. 1122). Therefore, humanity can learn the essential truth. That is God's "eternal power and divine nature" (*ESV*, 2001/2016, Romans 1:20). However, this capacity to learn comes with accountability to acknowledge the one who is revealed. The Scripture declares that "the fear of the Lord is the beginning of wisdom, and the knowledge of the Holy One is insight" (*ESV*, 2001/2016, Prov. 9:10).

Romans 12:2

The aim of the human practice of learning, arguably the renewing of the mind, is transformation. Paul calls the church to "be transformed by the renewing of your mind" (*ESV*, 2001/2016, Rom. 12:2). Paul uses the word "νοῦς," rendered here as "mind," to point to the seat of human discernment and understanding. Although the word was affiliated with Greek philosophic thought, particularly dualism, this ought not to be read into the text (Balz & Schneider, 1990, p. 478). Nevertheless, the term does mean more than the simple organ of intellectual exercise. Emanuel (2014) writes, "It is a key term for describing the faculty of thinking, thought processing, and understanding. … In certain instances, *nous* signifies a person's way of thinking or attitude" (Emanuel, 2014, "thinking" section). The clear implication is that this particular capacity of thinking, judgment, and discernment can be shaped anew.

Colossians 3:10

Paul painted a clear picture of transformation in his letter to the Colossian church. He describes the follower of Jesus as "putting on the new self" (*ESV*, 2001/2016, Col. 3:10). The

language conjures the image of a person removing old, soiled, and stained clothes and donning a new ensemble. A grievous list of distasteful characteristics marked the old, tattered outfit. The new is marked by a transformation and an assuring list of positive attributes. The point here is to highlight a phrase that indicates learning, or the attainment of knowledge, as part of that process. In Colossians 3:10, Paul presents a progressive process by which the "new self" is in a state of renewal. He writes that the believer has "put on the new self, which is being renewed in *knowledge* [emphasis added] after the image of its creator" (*ESV*, 2001/2016, Col. 3:10b). This verse parallels Romans 12:2, including the language of renewal. Here, though, the means is the attainment of knowledge or ἐπίγνωσις. The word goes beyond intellectual fact to comprehension. This comprehension comes through experience. Bultman (1985) wrote, "This act embraces every organ and mode of knowledge, e.g., by seeing, hearing, investigation, or experience, and of people as well as things" (p. 119). The end of this knowledge is to be shaped after the Creator's image—that is, Jesus Christ (*ESV*, 2001/2016, John 1:3).

Ephesians 4:23

Paul again presented the theme of renewal and the mind in his letter to the Ephesian church. As in the letter to Colossians, the "new self" image represents the influence of the Gospel's transformative work. Paul declares the believer is "to be *renewed* [emphasis added] in the spirit of your *minds* [emphasis added]" (*ESV*, 2001/2016, Eph. 4:23). In parallel to Colossians 3:10, the new self is modeled in the "likeness of God" (*ESV*, 2001/2016, Eph. 4:24). Once again, the word "νοῦς" appears to point to the mind.

Interestingly, where a dichotomy might have been drawn between the spirit and the mind, Paul draws them together. The language in verse 23 is in the infinitive with a present voice—meaning a progressive action. Stott (1979) captures it best when he writes, "Indeed a

continuous—inward renewal of our outlook is involved in being a Christian. If heathen degradation is due to the futility of their minds, then Christian righteousness depends on the constant renewing of our minds" (p. 182). So, the process of learning is a continual part of the Christian life—all intending to be restored to the Creator's image.

Transformation Is the Necessary Result of Learning

Andragogy places significant weight on the individual to direct their learning experience (i.e., self-directedness). The broken estate of humanity should give rise to some concern in consideration of an anthropocentric approach. The wisdom of Solomon does record that "there is a way that seems right unto man, but its end is destruction" (*ESV*, 2001/2016, Prov. 14:12). Although the self-directedness of the adult is a foundational assumption in andragogy, it is recognized that this is not a typical attitude in all adults in all situations. An adult may recognize the need for increased guidance due to a lack of proficiency or knowledge. Lewis (1992) captured it well: "It would be better to describe self-directedness as a goal for adult education and not a natural trait in all adults" (p. 167).

Andragogy rests on the principles espoused in humanistic psychology. This reliance includes the assumption that "human nature is intrinsically good, and human beings are free to choose how they behave and what they want to learn" (Merriam & Bierema, 2013, p. 54). This presupposition stands in contrast to the biblical reality that the introduction of sin has influenced the nature of man. In the previous passages, the image of the Creator is a frequent theme. Paul declared the believer is "being renewed in knowledge after the image of its creator" and dawning a new self "created after the likeness of God" (*ESV*, 2001/2016, Ephesians 4:24). Transformation is necessary because the introduction of sin undermined humanity's ability to fulfill their call to reflect the image of God. The image of God (imago Dei) is not lost because of sin (Gen. 9:6, 1

Cor. 11:7, James 3:9). Instead, sin undermines humanity's ability to fulfill its mission to bring glory to God. Smith (2009) wrote, "The imago Dei is not a thing or property that was lost (or retained); it was a calling and a vocation that Adam and Eve failed to carry out" (p. 164). The new Adam that is Jesus Christ comes to redeem humanity from its failure and equip it to fulfill its ultimate purpose, to bring glory to God. The renewal of the human mind, learning in the most profound sense, is a means within the redemptive process.

Biblical Truth Is the Content of Learning

The andragogical aim toward self-directedness is consistent with the ability of the believer to comprehend biblical truth and the perspicuity of the Scripture. The preeminent educational emphasis of the local church is nothing less than a greater understanding of God and humanity's part in His redemptive plan (Matt. 28:18, Eph. 4:13, 1 Pet. 2:9). The Holy Scripture, the Bible, is the most attainable and complete revelation of that truth. The individual believer has access to the most authoritative source of knowledge of God in an understandable format (Deut. 30:11–14, Rom. 10:8). This assertion is consistent with the doctrinal concept of the priesthood of the believer. This doctrine led Martin Luther to generate and make available the Bible in the vernacular of his audience. Luther and Calvin asserted that the faith in concert with the Holy Spirit empowered the believer to study and comprehend biblical truth independently. Corley et al. (2002) wrote of the reformation belief that

> spiritual intuition and confidence enabled individual believers to understand Scripture by exercising their private judgment apart from hierarchical control. So, their view of Scripture gave rise to their concept of the sufficiency of the believer. This conviction was fundamental to Luther's doctrine of the priesthood of the believer. (p. 113)

The Bible has been considered entirely sufficient for all matters relating to living out the Christian faith (Rom. 15:4, 16:25–26, 2 Tim. 3:15–17, Heb. 4:12). The andragogical model calls the Church to encourage the believer to delve into God's Word through personal study to

understand the Christian faith's truths. The Bible as the source of the necessary knowledge for the practice of faith is a long-held tradition. Hippolytus, the 2nd- and 3rd-century theologian, wrote:

> For just as a man, if he wishes to be skilled in the wisdom of this world, will find himself unable to get at it in any other way than by mastering the dogmas of philosophers, so all of us who wish to practice piety will be unable to learn its practice from any other quarter than the oracles of God. (Hippolytus, ca. 235/1886, p. 226)

Trester (1984) writes, "Challenged and motivated adults are able to assimilate and articulate biblical knowledge at a far greater depth than we previously had reason to imagine" (p. 346). The Church has available an authoritative source of knowledge accompanied by the believers' capacity to understand that source of truth.

Individual Accountability Is the Motivation for Learning

Andragogy rightly prizes individual responsibility for growth and maturation. The emphasis on the adult's self-concept and self-directivity establishes the "learning–teaching transaction as the mutual responsibility of learners and teachers" (Knowles, 1970, p. 43). Andragogy assumes that a teacher cannot force another to learn. The scripture records that accountability before God is a personal and individual matter. Paul declares that "we must all appear before the judgment seat of Christ, so *that each one may* [emphasis added] receive what is due" (*ESV*, 2001/2016, 2 Cor. 5:10a). Paul writes in Romans 2:6, "He [Jesus] will render to *each one* [emphasis added] according to his works" (*ESV*, 2001/2016). John, writing of the great white throne judgment, declares, "The dead were judged by what was written in the books, according to what *they had done* [emphasis added]" (*ESV*, 2001/2016, Rev. 20:12). The Scripture clarifies that there is no vicarious or corporate source of meritorious works beyond Christ. The believer cannot point to the spiritual accomplishments of a local New Testament

church, a pastor–teacher, or any other. Instead, the believer must be equipped and empowered to grow in likeness of Christ by renewing their mind.

Corporate Teaching as the Responsibility of the Shepherd–Teacher

Teaching was a preeminent means of propagating right thinking about God as offered by His special revelation. This practice began with Jesus and the apostles and continued with the New Testament Church. The Great Commission (Matt. 28:18–20) includes teaching as a means of making disciples—for example, “teaching them to observe all I have commanded you” (Matt. 28:20a). The early church emphasized the priority of teaching. This included the public proclamation of biblical truth. Keller (2015), considering the public preaching of Peter and Paul, wrote, “The development of the early Christian church and the development of its preaching were one and the same” (p. 12). Subsequently, God gifted the church with “pastors and teachers” to equip His body to carry out the work of the ministry (*ESV*, 2001/2016, Eph. 4:11). The preeminent role of teaching in the growth of the Kingdom fuels the relevance of this study. Also, it establishes a presupposition behind this research: Preaching and teaching form the principal task of the shepherd–teacher in the Church. A review of the biblical material supports the preeminent role of teaching as a task for pastors as shepherd–teachers. This section cannot be an exhaustive consideration of biblical material touching on the importance of teaching in the Church’s history—instead, a concise survey makes it plain that teaching is a principal task of the shepherd–teacher.

Acts 6:2–4

In Acts, the apostles desired to expand the servants in the church. Their reasons for delegating the task of caring for widows are to allow for “preaching the word of God” and to devote themselves to the “ministry of the Word” (*ESV*, 2001/2016, Acts 6:2–4). The verse

rendered in a most literal translation records the Twelve declaring it is “not desirable that we leave behind the word of God”. This passage presents another opportunity to emphasize that the substance of teaching is God’s special revelation. The apostles, who built the Church’s foundation, prioritized the teaching of God’s Word. The contemporary shepherd–teacher is continuing to build on the foundation established by the apostles. Thus, their focus ought to remain on communicating God’s Word. Calvin (1995), writing on this passage, emphasizes the focus on the teaching of God’s Word. He offers:

> Anyone who has been called to teaching should apply himself wholly. We find it all too easy to fall into sluggishness. In addition to this, the flesh gives us many plausible reasons for doing this, so that those who involve themselves with extra activities do not at once see that they are being distracted from their real work. (Calvin, 1995, Acts 6:2 section)

He goes so far as to describe the teaching as the “real work” (Calvin, 1995, Acts 6:2 section).

This passage makes explicit the priority of teaching. However, this does not lessen the importance of the broad means of serving. Gangel (1998) offered, “Teaching and prayer claimed priority, but not all disciples were involved in that. God calls different people to different kinds of ministries. The key lies not in spelling out some level of importance but being faithful to the call” (p. 91). This argument is rooted in the repeated use of the term “διακονία” (diakonia), often translated as “ministry” or “service,” in verses 1 and 4. The same term is used to characterize the daily distribution for the widows and the ministry of the Word. However, it should be a consuming ministry for those called to teaching that recognizes the privilege of communicating biblical truth.

Ephesians 4:11

When Paul expressed the spiritual offices, he described pastors and teachers. First, the likely conclusion is that these are the same person. One commentary says the Greek construction provides “strong evidence to suggest that this is one and the same person … the pastor–teacher

ministered as shepherd of the local congregation, teaching God's word" (Anders, 1999, p. 162). Such is the importance of teaching God's word that is invoked as part of the office. The pastor is a teacher. The consistent teaching of God's word is the means through which the shepherd responds to Jesus's call to "feed my sheep" (*ESV*, 2001/2016, John 21:17). However, the call implies more than the simple transfer of intellectual knowledge. The term "teacher," or "διδάσκαλος" (didaskolos), is an explicit reference to providing instruction or training to shape the life of a student. One tool says:

> It makes no difference whether the one who gives the instruction is God Himself (Dt. 4:10), the head of the family (Dt. 11:19), or the righteous. The term is always marked by the fact that it has a volitional as well as an intellectual reference. (Rengstorf, 1964, p. 137)

1 Timothy 3:2

The importance of teaching is emphasized in the qualifications for the office of an overseer. Merkle (2008) writes, "It is clear from the New Testament that an elder is primarily a teacher. The elders' calling to lead the church through their teaching distinguishes them from the deacons" (p. 92). In his role as an apostolic representative, Paul writes to Timothy that the overseer must "be able to teach" (*ESV*, 2001/2016, 1 Timothy 3:2). This precedent is affirmed in the parallel passage in 2 Timothy 2:24. Paul again contends that the answer to errant doctrine is found in the servant's ability to teach instead of quarreling. In both these instances, Paul employs the word "διδακτικός" (didaktikos). This phrase is a cognate of those words associated with the action of teaching ("διδάσκω," didasko) and a teacher ("διδάσκαλος," didaskalos). It is found only in these two places in the New Testament. Rengstorf (1964) contended that the term represents a capacity to teach that is especially important when false teachers "were creating difficulties which were threatening the inner and outer life of the Church and which had thus to be overcome" (p. 165). Merkle (2008) further emphasized the importance of teaching as a

qualification for pastors by pointing to Paul's corresponding direction in Titus (p. 92). Titus is told the pastor must be "firm to the trustworthy word as taught, so that he may be able to give instruction in sound doctrine and also to rebuke those who contradict it" (*ESV*, 2001/2016, Titus 1:9).

1 Timothy 4:13

In his first letter to Timothy, Paul's closing word emphasized the role of teaching in the church. He called Timothy to remain committed to teaching and "keep a close watch on yourself and on the teaching" (*ESV*, 2001/2016, 1 Tim. 4:16). Some commentators have offered this passage is a model for corporate worship in the Church. Larson (2000) comes to a poignant conclusion in addressing this passage:

> Preaching (exhorting) and teaching (explaining) are also essentials of public worship. … Teaching is regarded as instructional. A teacher explains the principles of Scripture in more intellectual terms. The point is not to create some rigid rules, but to understand that both teaching and preaching are Spirit-given gifts which must be exercised for the good of the fellowship of believers. (p. 208)

Teaching in the corporate setting of the Church proves especially valuable for challenging and confronting errant doctrine. This teaching was the task given to Timothy in the early Church. Guthrie (1994) recorded, "The word for teaching is in all probability related to the passing on of Christian doctrine" (p. 1301). The substance of Timothy's teaching was the sound doctrine handed down from the apostles. Such is the importance of the proclamation of biblical truth and teaching that Paul calls Timothy to "literally, 'BE in these things'; let them engross thee wholly; be wholly absorbed in them. Entire self-dedication, as in other pursuits, so especially in religion, is the secret of proficiency" (Jamieson et al., 1997, p. 414). Contemporary shepherd–teachers, like Timothy, are exhorted by Paul to "keep a close watch on yourself and on the teaching" (*ESV*, 2001/2016, 1 Tim. 4:16a). Communicating doctrinal truth (orthodoxy) and consistent

lifestyle (orthopraxy) is the means of fruitful ministry that will "save … your hearers" (*ESV*, 2001/2016, 1 Tim. 4:16b).

Theological Framework Summary

A biblically informed anthropology revealed that man is not only capable of learning but called to a transformative shaping of the mind through intentional engagement with God's special revelation. The Bible serves as a reliable and trustworthy guide to faith and life, making it a worthy locus of learning. The body of Christ is also gifted with the office of the shepherd–teacher. As a matter of stewardship, the shepherd–teacher has the privilege of and responsibility for not only communicating God's Word but also creating learning experiences that equip the body of Christ for every good work. This theological framework establishes the presuppositions and commitments of the study that guide increasing engagement with the theoretical framework of Knowles's andragogy and SDL.

Theoretical Framework: Knowles's Adult Learning Theory and SDL

This study focused on the learning attributes of the shepherd–teacher with respect to adult learning theory. Academic consideration of adult learning has blossomed in the past 5 decades. This study relied on the assumptions regarding adult learning proffered by Knowles. Knowles's assumptions, known as "andragogy," fueled specific approaches to teaching. Such approaches to teaching included the theory of SDL. This section reviews Knowles's concept of andragogy and its application in research and practice. Additional attention is given to the historical development of the theory of SDL, both as a learning process and as a measurable attribute of learners. Finally, the section offers a cursory introduction to the validated instrument, the SDLRS, employed in this study.

Malcolm S. Knowles

Knowles was not the first to consider the unique pedagogical approach to educating adults: “The seeds of an approach to adult learning as being different from pedagogy can be found with scholars of antiquity” (Merriam & Bierema, 2013, p. 44). In teaching adults in the early 20th century, Knowles looked to historical works from social philosophers and behavioral and social scientists. Knowles recognized the philosophical and anecdotal nature of the resources that were available that considered adult learning. His acknowledgment of the absence of comprehensive theory relating to differences in adult learning fueled his research (Merriam & Bierema, 2013, pp. 44–46). Knowles would grow in prominence by publishing more than 200 articles and 19 books related to adult education. At the time of his passing, in 1997, Knowles was eulogized as the “father of adult education” (Henschke, 1997, p. 2).

Andragogy

The term “andragogy” was not coined by Knowles. Instead, he adopted it early in his research after hearing the term from a European scholar of adult education. The term “andragogy” would represent the art and science of facilitating adult learning, including encouragement of SDL (Knowles, 1970, p. 38). In his chapter explaining andragogy, Knowles (1970) commits the majority to unpack a series of four initial assumptions. Later, in 1984, he added a fifth assumption to address the learner’s motivation, and later still (i.e., 1990) he added a sixth assumption tied to a learner’s need to know (Merriam & Bierema, 2013, p. 47). For each assumption, there are coinciding technological or practical implications.

The Learner’s Self-Concept

Andragogy highlights a distinct shift in the self-concept of the learner from child to adult. A child is dependent and assumes the role of a passive learner. Knowles (1970) described it as

"receiving and storing up information adults have decided children should have" (p. 39). However, this dynamic changes as a person matures and becomes more self-directed and independent. The adult desire to be recognized as independent and self-directed creates adversity in situations that might challenge autonomy. Previous conditioning creates resistance to adult educational experiences. Knowles et al. (2015) offered, "The minute adults walk into an activity labeled 'education,' 'training,' or anything synonymous, they hark back to their conditioning in their previous school experience, put on their dunce hats of dependency, fold their arms, sit back, and say 'teach me.'" (p. 65). This attitude creates a conflict for the adult learner, given they desire to be recognized as autonomous and self-directed. The implications require an adult educator to address the learning environment, creating an atmosphere that is respectful, accepting, and supportive. The adult learner is allowed to develop the planning for the learning experience, including objectives of learning (Knowles, 1970, pp. 41–43).

The Learner's Experience

Unlike a child, an adult learner enters a learning transaction with a varying volume of diverse experiences informing their views and identity. The relationship between an adult's experiences and their identity creates a "deep investment in its value" (Knowles, 1970, p. 44). The accumulation of experience indicates that adult learners are better positioned to contribute to the learning experience. Additionally, the broad experience provides a context in which to assimilate new knowledge and experiences. However, past experiences can also hinder learning. Adults enter the learning environment with habits, presuppositions, and commitments that could be less open minded. In turn, the adult educator ought to look to leverage instructional approaches that prize experience (e.g., group discussions, case studies, and projects).

The Learner's Readiness to Learn

Adulthood, like childhood, is a developmental period. The adult experiences seasons of growth that create readiness for learning and teachable moments. However, an adult's readiness to learn is primarily instigated by the evolution of social roles (e.g., starting an occupation, rearing children, and meeting civic obligations; Knowles, 1970, pp. 46–47). A transition from one developmental stage to another creates a readiness for the adult to navigate real-life situations effectively. This observation is not to say that an adult is only capable of learning or ready to learn during development or social changes. Instead, Knowles et al. (2015) recorded, "there are ways to induce readiness through exposure to models of superior performance" (p. 67). Grouping learners is the area where this assumption wields the most influence. Knowles (1970) suggested it is often preferable to group learners according to a shared developmental task (p. 47).

The Learner's Orientation to Learning

Adult learners engage in problem-centered learning. They pursue education with an eye toward the immediacy of application. Attention is given to coping with problems that are in the present. This view contrasts with that of a child, who spends much time accumulating knowledge based on its potential future value. Children are generally oriented to the subject matter, whereas adults focus on existential concerns (Knowles, 1970, p. 48). This assumption directly addresses how adults learn. Knowles et al. (2015) wrote that adults "learn new knowledge, understandings, skills, values, and attitudes most effectively when they are presented in the context of application to real-life situations" (p. 67).

The Learner's Motivation to Learn

Children might be influenced by the threat of poor grades, punishment, or external rewards. However, the adult learner is less susceptible to such influence. Most adult learning activities are voluntary. The adult learner is motivated by intrinsic elements such as curiosity, job satisfaction, self-esteem, or quality of life (Knowles et. al, 2015, p. 68). It is no surprise that the adult learner's motivation is predominantly internal, given that their orientation to learn and readiness to learn are driven by immediate individual circumstances and roles and are intended for immediate application. The assumption of intrinsic motivation of humanistic psychology influences Knowles, particularly through the work of Abraham Maslow and Carl Rogers (Merriam & Bierema, 2013, p. 54). Of course, there are occasions when adult learning encounters are mandated or required. Still, there is value in drawing the connection between the needs and interests of the learner and the content to fuel internal motivations.

The Learner's Need to Know

Adult learners require an understanding of why they need to learn something before pursuing a learning event. Knowles et al. (2015) contended, "The first task of the facilitator of learning is to help the learners become aware of the 'need to know'" (p. 64). This assumption is closely tied to the learners' readiness to learn and orientation to learn. The relevance to the immediate situation related to changing roles and life situations or changes in the workplace can increase the motivation of the adult learner. This principle is most valuable when an adult can understand why a learning activity is essential (Merriam & Bierema, 2013, p. 55).

Andragogy in Research and Practice

Andragogy's assumptions and associated methodology, like most scholarly topics, generated debate and conversation. In the half-century since Knowles popularized andragogy, it

has been critiqued. Some have contended whether it could be described as a theory. Others have considered the validity of the assumptions. Merriam and Bierema (2013) wrote, “The actual research in support of these assumptions is mixed at best” (p. 57). Rachal (2002) offered, “This attention is attributable to andragogy’s preeminence as the most persistent practice-based, instructional methods issue in adult education” (p. 211). The predominant challenge documented by Rachal is the absence of an operational definition for Knowles’s andragogy and, more practically, a criterion with which to identify what procedures constitute andragogical practice.

Rachal (2002) succinctly identified necessary conditions for the application and research of andragogical concepts based on a macrostudy. The criteria attempt to overcome difficulties with empirical research related to consistently identifying the application of andragogy (Rachal, 2002). These criteria also prove helpful in identifying a context, or learning environment, that exercises essential concepts of Knowles’s concept of andragogy (see Table 1). Of Rachal’s criteria, only six are immediately tied to Knowlesian andragogy, while the seventh criterion is solely related to technical issues associated with quantitative research.

Even absent a clear operational definition, the concepts associated with Knowles’s andragogy had a broad impact in the field of adult education. It influenced future adult education scholars to create and establish instruments with which to measure SDL readiness and attributes (Hiemstra, 2003, pp. 6–7). The influence was especially notable in the fields of graduate education and professional development. Still, the question remains of how Knowles’s andragogy’s characteristics influence learning experiences in the seminal moment of corporate teaching in the context of the local New Testament church. Knowles (1977) himself saw the relevance, having penned an article for the journal *Religious Education*.

Table 1

Rachal's Criteria for Future Andragogical Research

Criterion	Description
Voluntary participation	The learner wants to participate for personal fulfillment.
Adult status	Andragogy is viewed as focused on adults.
Collaborative determination of objectives	The learner plays a significant or primary role in determining learning objectives.
Performance-based assessment	The measure of achievement should be as unlike traditional schooling and as low-threat as possible.
Measurement of satisfaction	Satisfaction with the learning experience should be measured in all settings.
Appropriate adult learning environment	A physically and psychologically comfortable environment.

SDL

The shepherd–teacher studies and prepares teaching content weekly. This process generally happens without the direction of a professor, teacher, or facilitator. It could be reasonable to expect a shepherd–teacher to have some attributes, capacities, or gifts needed to act as a self-directed learner. SDL has been characterized as one of the most rapidly developing and researched areas in the educational field within the 21st century (Senturk & Zeybek, 2019, p. 151). For Knowles, SDL was closely tied to the educational approach described as "andragogy." He defined SDL as

> a process in which individuals take the initiative, with or without the help of others, in diagnosing their learning needs, formulating learning goals, identifying human and material resources for learning, choosing and implementing appropriate learning strategies, and evaluating learning outcomes. (Knowles, 1975, p. 18)

More recently, Merriam and Bierema (2013) offered a similar characterization. They described the learner engaging in SDL as someone who "intentionally sought the learning, planned … learning, took responsibility, controlled … learning, and evaluated the outcome" (Merriam &

Bierema, 2013, p. 61). SDL has been characterized as both a process, as in Knowles's definition, and an attribute or predisposition and comfort with autonomy in learning (Merriam & Bierema, 2013, p. 63).

SDL as a Process

Research related to SDL as a form of adult learning has aimed to clarify a process and model. Even early in the origins of SDL, Tough (1978) considered learning projects and the series of steps a learner would undertake, beginning with a decision to learn and continuing to how to maintain motivation to learn. Knowles (1975) presented a six-step process that involved setting a climate, diagnosing learning needs, formulating goals, identifying resources (material and human) for learning, choosing strategies, and evaluating learning outcomes. However, more recent efforts have refined the models and applications of SDL.

Costa and Kallick (2004) suggest a process they describe as the "feedback spiral" to increase self-directedness in learning. They expand on Garrison's (1997) concepts of self-management and self-monitoring with self-modification. They eschew traditional academic testing, arguing "process-oriented goals, such as the student's capability to become more self-directed and self-evaluative, cannot be assessed using product-oriented measurement techniques" (Costa & Kallick, 2004, p. 2). Assessment is the means with which to move learners toward being increasingly self-directed and capable of self-evaluation. The feedback spiral involves clarifying goals and purpose, planning necessary actions, acting, gathering evidence, reflecting, modifying action, and revisiting or redefining the goals. The cyclical process is reminiscent of the double-loop learning of Argyris's (2002) organizational learning model.

Brockett and Hiemstra (1991) presented the personal responsibility orientation (PRO) model of SDL. The PRO model considers both instructional methods (SDL) and personality

characteristics (self-direction). This framework is the basis for their instructional process, which includes the steps of initial planning, climate setting, acquainting learners, needs assessment, and evaluation. Stockdale and Brockett (2011) subsequently developed an instrument with which to measure self-directedness among college students. The instrument, the PRO to SDL Scale, includes 25 items. The PRO model has since been updated to thoroughly consider the individual (person), instructional method (process), and overall conditions and environment (context). The model has been labeled the "person process context model" (Merriam & Bierema, 2013, p. 66).

SDL as an Attribute

Considerable research has been completed regarding SDL (Brookfield, 1985, pp. 5–15; Merriam & Bierema, 2013, p. 63). This research includes work to identify characteristics of self-directed learners. Researchers have presented an array of lists. Senturk and Zeybek (2019) wrote that self-directed learners "can establish good relations with others" and "are self-confident" (p. 153). Other theorists have identified common elements associated with SDL, including the responsibility of the learner in the process to identify informational needs and goals, meet those goals, and evaluate the results of the learning experience (Senturk & Zeybek, 2019, p. 152). Competencies associated with SDL emphasize a high degree of self-awareness, interpersonal skills, and critical thinking to evaluate resources and outcomes. Knowles (1975) recognized that the process of SDL required specific competencies (pp. 23–24). His short volume on SDL (Knowles, 1975) presented a list of qualities that included:

- an understanding of assumptions about learners and the skills required for learning,
- the self-concept of being independent and self-directing,
- the ability to relate to peers collaboratively,
- the ability to diagnose one's own learning needs with help from teachers or peers,
- the ability to translate learning needs into objectives,

- the ability to relate to teachers as facilitators,
- the ability to identify human and material resources for learning,
- the ability to select effective strategies for the use of learning resources, and
- the ability to collect and validate evidence of accomplishment of learning objectives.

Oddi (1987) argued that considering SDL from a process perspective was insufficient because it failed to account for those adults who could not, or did not, plan their learning experiences. Instead, the individual's personality should be studied to account for the persistence in a learning activity. Oddi (1987) initially explored the topic as part of a doctoral dissertation to develop an instrument. Oddi (1987) worked to identify personality characteristics of self-directed learners and measure them through the creation of an instrument. The final 24-item instrument was considered valid for identifying self-directed continuing learners, emphasizing self-directedness as a personality trait (Oddi, 1986).

Guglielmino (1978) presented a Delphi study with notable SDL scholars to measure specific characteristics associated with SDL. The initial research aimed to "obtain consensus from a panel of experts on the most important personality characteristics of highly self-directed learners" (Guglielmino, 1978, p. 3). Her research included an expert panel of 14 experts. Most notable were Knowles, Tough, and Houle (Guglielmino, 1978, p. 32). The research yielded 41 items, or characteristics, which emerged from the survey characterized by the expert panel as desirable, necessary, or essential. Factor analysis was conducted by Guglielmino (1978) after a tryout of the initial instrument; the analysis revealed eight factors (a) Self-Concept as an Effective Learner, (b) Openness to Learning Opportunities, (c) Initiative and Independence in Learning, (d) Acceptance of Responsibility for One's Own Learning, (e) Love of Learning, (f) Creativity, (g) Ability to Use Basic Study Skills and Problem-Solving Skills, and (h) Positive Orientation to the Future.

The reliability and validity of these factors have been challenged, with particular questions regarding their explanatory power due to ambiguity of terms and research constructs (e.g., whether a construct is homogeneous or multifactorial; Field, 1989, p. 131). The tool for this study is intended to “provide a means for an individual to assess his strengths and weaknesses in self-direction in learning” (Guglielmino, 1978, p. 5).

A Tool for Considering Attributes of SDL

This study relied on the SDLRS as a validated instrument. This instrument aims to measure an adult’s preparedness for SDL. It was created by Guglielmino (1978). The tool marked a vital step in empirical understanding of andragogy and SDL. It has been characterized as the “most notable empirical instrument” associated with studying andragogical concepts (Taylor & Kroth, 2009, p. 9). The tool is a Likert-type scale consisting of 58 items, each of which asks respondents to self-report the degree to which the statement accurately describes their attitudes, beliefs, actions, or skills (Guglielmino & Guglielmino, 2020).

The scale was not accepted uncritically. Field (1989) raised concerns about using a Delphi study, the definition of terms like “readiness” and “self-directed learner,” negatively phrased items, and incorporation of additional items after validation (pp. 125–139). Each of these challenges was answered by Guglielmino (1989), who noted that the Delphi study did not yield the items in the scale, instead it sought consensus among noted scholars in the field on characteristics of self-directed learners (p. 236). Additionally, a meta-analysis of research related to SDL documented that the SDLRS was the most commonly used instrument and recorded validation studies with observed Cronbach’s alpha reliability coefficients between .793 and .950 for the SDLRS (McCune, 1988, pp. 15, 53). Additionally, Delahaye and Choy (2000), in a review of the SDLRS, concluded that the assessment “can be used with acceptable confidence to

provide an accurate measurement of readiness for self-directed learning" (Results and comments section).

Merriam and Bierema (2013) contend that the integration of SDL with other fields of study provides an impetus for continuing innovation and study. Guglielmino continues to provide access to the SDLRS in the form of the LPA, after renaming the original instrument to avoid response bias (Guglielmino & Guglielmino, 2020). The SDLRS/LPA remains a viable instrument with which to explore the influence of andragogical principles and SDL attributes of a shepherd–teacher on the learning experience of a local New Testament church. The instrument was beneficial for providing shepherd–teachers with an opportunity to understand their orientation and self-directedness with respect to learning.

Theoretical Framework Summary

For over 5 decades, research relating to adult learning as a distinct field has produced multiple theories and models regarding how adults learn. Knowles's early efforts established a series of assertions or presuppositions regarding adults and their approach to learning. These assumptions fueled increased thought that aimed to define and clarify specific models of adult learning. One such model, SDL, served as the theoretical framework for this research study. SDL has been viewed as both a process and a personal attribute. This study emphasized SDL as an attribute or personal characteristic. This view supported the use of a validated tool, the SDLRS/LPA, to consider the presence of the attributes of SDL in the shepherd–teacher of a local New Testament church and how this learning preference may influence or correspond with the learning experience of the congregation. However, it would be valuable to place this theoretical framework in the broader context of scholarship related to learning and leadership.

Related Literature

This study addressed the learning capacities of the shepherd–teacher in the context of leading a local New Testament church. The principal means of leadership is the clear proclamation and teaching of God's special revelation. However, the study required theoretical context beyond an emphasis on a single theory of adult learning. This section addresses literature from the field of Christian education, homiletics (the study of preaching), other adult learning theories, and organizational leadership. The volume of material related to each of these areas makes it impractical and superfluous to address them in depth. Instead, a summary of each theory is offered indicating where the theories complement or contrast with the theological or theoretical frameworks of the study.

Christian Education

The practice of science and faith are often presented as being at odds. However, educational psychology, insofar as it reflects an understanding of God's human creation, provides insight that enhances the Church's call to equip its adherents. Mitchell (2010), in his chapter addressing foundations of teaching and learning, defines educational psychology as the discipline that "addresses the principles of psychology that may be applied to the teaching–learning process and related educational activities" (p. 129). He notes that educational psychology has in recent times returned some attention to the concept that the activity of the soul is worthy of study, particularly in consideration of the learning process. The work of William R. Yount goes a step further in establishing a framework within which Christian education can consider educational psychology. Mitchell (2010) offers that Yount created a "truly emergent synthesis for Christian education today" (p. 131).

Yount (2010) offers, “Educational psychologists have proposed a variety of theories to make intentional learning more efficient and effective” (p. 188). He looks to theorists to characterize how learners develop as thinkers, persons, and moral decision-makers. Yount (2010) subsequently ties each learning theory offered to “the discipler’s model” and argues that “educational psychology speaks to six of the seven elements of the model directly” (p. 26). The Bible becomes the subject of study, and Piaget’s ideas on conceptual organization become relevant along with the cognitive structure developed by Bruner. The humanistic theories of learning are applied to explain how learners share their values, experiences, and perspectives with others. Lev Vygotsky’s theories focus on social interaction as the necessary context for learning, emphasizing language and culture, and work in concert with Jean Piaget’s theories on cognitive development through discovery to reveal how the Church might better engage its body as thinkers. Yount offers much material to provide insight from educational psychology on how the congregation might learn and also to provide suggested applications. Still, little is offered to address how Yount’s synthesis of educational psychology should inform the shepherd–teacher in the preaching moment.

Mitchell (2010) criticizes Yount’s “discipler’s model” due to an omission of “any reference to non-biblical sources for the message(s) to be transmitted” (p. 132). This point may be a significant criticism for those in the broader field of Christian education. Yount’s (2010) focus on “biblical content” is precisely the quality that makes the model so endearing for practical application to pastoral ministry. So, Yount’s preliminary work on educational psychology provides an excellent starting point for consideration of how educational psychology should inform teaching in pastoral ministry.

Kang and Parrett (2009), writing on education in the Church, rightfully make plain the epicenter of Christian education and teaching as being proclamation of the glorious Gospel. The first five chapters of their work are committed to outlining the centrality of the Gospel and its place in the Church's curriculum. It would seem the measure of teaching is its ability to communicate and call for a response to the Gospel. This call is the task of the teacher in the Church. Unlike other authors, Kang and Parrett directly address the pastor as a teacher. They offer, "Many pastors seem to have all but forsaken the teaching task as a key aspect of their ministry … many pastors have simply abandoned the task of significant teaching altogether" (Kang & Parrett, 2009, pp. 157–158). However, beyond calling attention to the shift in pastoral attention, they offer little that is prescriptive. They miss an opportunity, perhaps because it is a detail too deep within their scope, to offer the pastor clear and concise insight into applying the teaching theories to the ministry of the pulpit. Their conclusion contends that they aim to "draw attention to certain faithful practices that believers and congregations can engage and participate in … to help foster personal and corporate growth" (Kang & Parrett, 2009, p. 434).

Newton (2012), writing on the educational ministry within the Church, points to Bloom's hierarchical taxonomy as a framework with which to consider the effectiveness of teaching in the Church. He offers, "Benjamin Bloom provides us with a basic taxonomy of the cognitive domain, including six levels of learning" (p. 46). His pages are then given over to unpack those six levels of learning and domains of learning to establish the "goals and objectives in each of the domains … to help people discover and experience truth at increasingly deeper levels" (Newton, 2012, p. 54). This model seems to address the four domains of learning, and leading people to the point of "evaluation" is the means to success for the preacher. Success might be better defined as students and teachers growing in their likeness to Christ.

Many worthy volumes provide insight into the Christian education community from educational psychology and learning theory. They suggest practices or models that ought to be adopted by the local New Testament church. The practices emphasize specific educational ministries of the Church, and few directly address the shepherd–teacher in the preaching moment.

Homiletics

The preaching moment has primarily been offered as a "rhetorical speech act," leading to its deeper connections to communication theory rather than learning theory (Stuart, 2011, p. 120). Emphasis is given to developing the sermon's content through sound biblical exegesis, thoughtful consideration of the hearers, structuring of the sermon material, and delivery of the material (Miller, 2006). Ellsworth (2000) gives excellent attention to consideration of the preaching event as an exercise in "orality": communication through the spoken word. Ellsworth described the influence of the oral tradition on human thought and shared identity and declares the sermon's aim and oral craft. He writes:

> The great purpose of the oral craft is to create a sermon inside the preacher in all its fullness so that, when the moment to preach comes, the text of scripture in all its meaning and significance pours forth from the preacher with purpose. (Ellsworth, 2000, p. 130)

Stuart (2011), citing multiple authors, writes, "Although much continues to be added to the homiletic literature there remains a lack of empirical evidence regarding sermon impact" (p. 119). It is plain the pastor leverages the preaching moment to teach the congregation. However, the question remains of whether the contemporary homiletical approach considers adult learning theory.

The homiletical literature is prolific. This is unsurprising given the role of the preaching moment throughout the Church's history and its emphasis each week as the Church assembles. However, the research questions in view helped to identify three areas where the homiletical

literature informs and shapes the answers to the research questions. First, literature recognizes the tension between preaching and teaching and determining how preaching corresponds with education in the Church. This tension has, more likely than not, instigated a reluctance to consider the preacher and the preaching moment through the lens of adult learning theory. Second, homiletical literature repeatedly acknowledges the influence of the internal life of the preacher on the preaching moment. Some volumes even directly address the shepherd–teacher's capacity as a learner. Finally, the volumes prescribe processes and methods for biblical exposition and personal application. Interestingly, parts of some of the suggested preparation processes reflect the behaviors associated with Knowles's andragogy.

Literature in the field of homiletics identifies an effort to better explain how the preaching moment corresponds with the educational aims of the Church. Trentham (2023) raises this opportunity when exploring the relationship between teaching and preaching ministry. He wrote, "This discussion has been heretofore avoided in our academic community" (Trentham, 2023, p. 157). Vines and Shaddix (2017) observe that "similar to the false dichotomy between preaching and worship, it appears that for many believers preaching and disciple-making have become mutually exclusive" (p. 54). This could go a long way toward understanding the application of learning theory to educational ministry in the Church, but not the pulpit. The educational ministries of the Church are readily acknowledged as a means of discipleship. Accepting preaching as a form of disciple-making encourages the opportunity to consider the role of adult learning theory in better understanding the preacher and the preaching moment.

A review of the definitions of preaching demonstrates an emphasis on proclamation. Reviewing the various definitions of preaching shows some ambiguity in the intended aim of the preaching moment. Generally, the definitions of the means and the preaching content are

consistent. They include oral proclamation of a biblical text. However, they differ in the intended goal of said proclamation. Scharf (2005) wrote, “To preach the Word, then, is to declare in his name and by his power, from one or more texts of the Bible, what God placed there in order to achieve his ends for his glory” (p. 13). The intended aim is God’s end. Keller (2015) commits a chapter to understanding the biblical concept of preaching. It is best characterized as the ministry of the Word, including various settings and communications intended to convey “teachings of the Bible.” (Keller, 2015, p. 11). However, he narrowly defines the sermon as “the public preaching and exposition of the Bible to assembled gatherings” (Keller, 2015, p. 12). Later, he explained that good preaching includes the compelling and engaging exposition of biblical content that speaks to people (Keller, 2015, pp. 23–26). The preacher’s goal is simply faithful delivery of biblical text without expecting a particular outcome. Wilson (2013) provides a concise definition: “Preaching is proclamation that exults in the exposing of God’s glory” (p. 121). There is a particular aim to expose God’s glory. McDill (1999) concludes his definition with the goal of “calling the hearers to faith in God” (p. 21). Heisler (2007) directly addresses life change as the aim of the preaching moment. He advocates for preaching “with a view to applying the text by means of the convicting power of the Holy Spirit, first to the preacher’s own heart, and then to the hearts of those who hear” (Heisler, 2007, p. 21). Robinson (2014) also notes that preaching includes the exposition of a biblical text that “the Holy Spirit first applies to the personality and experience of the preacher, then through the preacher, applies to the hearers” (p. 5). Quicke (2003) contends that preaching intends “to create new people in new community” (p. 27). Akin et al. (2011) elaborate on their definition by emphasizing that “changed lives for the glory of God is always the goal for which we strive” (p. 14). Several definitions of preaching are satisfied with the ends of preaching as a rhetorical act communicating biblical truth. Some

definitions allude to the preaching moment's role as a means of transformation. However, "discipleship" did not appear in any of the definitions. It is possible this end or aim would be assumed by the readers. The common attribution of "application" or "change" as an aim of the preaching moment does not entirely express the preaching moment's connection to ongoing teaching in the Church to spur Christian maturity through a growing understanding of biblical truth. The volumes on preaching approach the preaching moment as an isolated rhetorical event in the Church developed, in general, through a prayerful study strategy that includes consideration of the preacher's characteristics and qualities.

Griffiths's (2017) exegetical study of preaching in the New Testament included a finding not recorded in the definitions of preaching in the homiletical texts: the commission of the preacher. Griffiths (2017) followed the Greek verbs used to refer to the communication of God's Word in the New Testament, especially preaching. He focused on three terms used for Gospel proclamation: "euangelizomai," "katangello," and "kerysso" (p. 28). He summarized his findings:

> As used in the New Testament, the verbs typically refer to the act of making a public proclamation; the agent is generally a person of recognized authority; and the substance of the proclamation is normally some aspect of Christ's Person and work, the implications of the gospel, or some other truth from God's word. (p. 50)

The ensuing exegetical research draws out an interesting finding especially relevant to the exploration of the person of the shepherd–teacher. Griffiths concluded, "Preaching is normally carried out by those who have a recognized role of authority within the church and possess a commission to preach" (p. 128). The weight of the commission of the shepherd–teacher increases the value of equipping and encouraging them in the conduct of their lofty calling.

The volumes written to equip preachers regularly address the personal or internal life of the preacher. The consistent theme is the application of the biblical message to the life of the

shepherd–teacher as part of the preparation of sermon content. Robinson's (2014) definition of preaching emphasizes the preacher's internal life. He wrote "that the truth must be applied to the personality and experience of the preacher. This places God's dealing with the preacher at the center of the process" (Robinson, 2014, p. 8). McDill (1999) commits a chapter of his text to the person of the preacher, including consideration of issues beyond the spiritual life, like regional accents and vocabulary. However, the principal observation is his assertion that the preacher's personality "will so color your preaching as to be a determining factor in its effect with the audience. Who you are as a person is as important as what you preach" (McDill, 1999, p. 22). Gibson (2018) also commits an entire chapter to the preacher's internal experiences and their confluence with preaching. The focus is oriented toward Christian maturity. He wrote, "The inner world of the preacher is where one cultivates the characteristics of Christian maturity—one's character" (p. 59). Pace and Thomas (2018) observe "the significance of the messenger's part in God's plan as he graciously communicates eternal truth through the unique gifts, individual character, and speaking style of willing servants" (p. 14). The texts consistently agree on the influence of the internal life of the preacher and the capacity to communicate biblical truth during the preaching moment.

In the consensus on the influence of the preacher's character and spiritual life, there is also a thread that directly acknowledges the need for a capacity to engage in continual development and learning. The sources present an implicit expectation of the preacher's ability to learn on their own initiative. However, some sources directly address the preacher's capacity for learning and its importance. Vines and Shaddix (2017) wrote to the preacher, "You must not only spend time preparing the message, but you must also prepare yourself. God's Word is not preached apart from human instrumentality" (p. 85). Intellectual development and good study

habits are within the list—two areas akin to the shepherd–teacher's learning skills. The emphasis on intellectual development aligns with an implied capacity for SDL. They wrote:

> So it is with the intellectual development of the preacher. Because you've been called upon to preach the Word of God, you must prepare yourself intellectually to the fullest extent of your abilities. No preacher should be satisfied to use only bits and pieces of the intellectual ability with which God has blessed him. Of the many avenues for intellectual development, the effective Bible preacher certainly should give attention to both education, examples, and experience. (Vines & Shaddix, 2017, p. 100)

Stott and Scharf (2015) likewise emphasize a vital connection between the shepherd–teacher's capacity for learning and the ministry of the pulpit. They write, "The best teachers remain students all their lives" (Stott & Scharf, 2015, p. 36). The volume continues without offering a prescriptive process, instead providing encouragement to seek out learning resources, learning communities, and intentional strategies (called "habits"), to enhance biblical learning (Stott & Scharf, 2015, pp. 36–38). Lawson (2022) also confronts the necessity for perpetual growth as a shepherd–teacher. He writes, "You are either growing in your gifts as a preacher or reverting. If you are satisfied with where your preaching is, you are surely drifting backward, whether you realize it or not" (Lawson, 2022, p. 84). The expectation of continued development of the shepherd–teacher as a learner directly corresponds with a capacity for SDL.

Most homiletical texts focus on presenting a specific sermon development process or strategy to assist the shepherd–teacher in engaging in Bible study that reaches the pinnacle of accurately, clearly, and effectively communicating biblical truth in the preaching moment. Pace and Thomas (2018) present a seven-step sermon development process. The process includes steps that repeat the imperative to study. The central framework of their process for sermon development is explained in a chapter committed to "studying the truth" (Pace & Thomas, 2018, pp. 31–40). Interestingly, they open the chapter with an allusion to the frustration a preacher might feel based on experiences in a pedagogical setting, "remembering what it was like to

memorize facts to regurgitate for a test" (Pace & Thomas, 2018, p. 31). Their answer to this frustration is to implement a specific strategy with which to encourage focus, maximize time use, and ensure a faithful handling of the biblical text. Vines and Shaddix (2017) present a step-by-step process to work towards discerning a "central idea of the text (CIT)" (p. 153). The steps include studying the historical, grammatical, and theological context of a specific passage of an intentionally selected biblical text, which might be based on understanding needs, congregational situations, or individual experience (Pace & Thomas, 2018, pp. 124–125). Lawson (2022) likewise expresses a specific interpretive process for the shepherd–teacher to follow in unfolding the biblical text as part of sermon preparation (pp. 40–52) The earliest stage of the process requires the shepherd–teacher to "pursue the proper training that best prepares you to exposit His word" (Lawson, 2022, p. 41). The training in view includes original languages, theology, church history, and exegesis. The volumes provide the shepherd–teacher with a prescribed process for discerning the biblical text's principal idea. A prescriptive process contrasts with self-directedness in learning. However, it indicates the reality that the shepherd–teacher is a persistent learner as a student of the Bible.

Although the prescriptive process of the homiletical text contrasts with self-directedness in learning, the processes often include elements that reflect andragogical principles drawn from Knowles. The preachers are encouraged to meet specific learning objectives (e.g., history, theological implications, cultural context, and grammar) using various learning resources through a suggested strategy. Stott and Scharf (2015) do not offer a rigid process but instead encourage discovery of learning resources, learning communities, and intentional study strategies to enhance biblical learning (pp. 36–38). Lawson (2022) also highlights the need to gather learning resources: "You must have the necessary resources to properly study the passage to be

preached" (p. 43). Learning resources are emphasized again when the shepherd–teacher is encouraged to secure a fitting supply of learning resources before commencing study of a new biblical text or doctrinal topic (Lawson, 2022, p. 45). Although none of the volumes directly address the shepherd–teacher's learning preferences or skills, the echo of elements associated with Knowles's concepts of SDL and andragogy illustrate its relevance to exploring the experience of the shepherd–teacher and the preaching moment.

Other Theories of Adult Learning

Scholarship has continued to contribute theories, beyond Knowles's andragogy and SDL, to explain how adults learn. These contributions include principally experiential learning, transformative learning, and dimensions of learning.

Experiential Learning

Beard (2023) explains that everyone has experiences. However, experience does not equate to learning. Rather, it requires "a readiness to grasp and transform the experience in some way and at some point in order to learn from it" (Beard, 2023, p. 193). Experiential learning theory provides the corresponding intentional framework and process. Beard (2023) notes that even in light of the prolific use of the term "experiential learning," the concept proves more difficult to define (p. 194).

Experiential learning is associated with the scholar David Kolb. Experiential learning is a process model that focuses less on behavioral outcomes. The theory is primarily influenced by the thinking of Dewey, Vygotsky, and Piaget and ideas associated with developmental education (Beard, 2023, p. 199). Beard (2023) contends there is no singular definition of experiential learning, especially given its broad application (p. 194). Kolb (2014) describes experiential learning as a four-part iterative process. He wrote, "The process of experiential learning can be

described as a four-stage cycle involving four adaptive learning modes—concrete experience, reflective observation, abstract conceptualization, and active experimentation" (Kolb, 2014, Process and Structure in Experiential Learning section) The role of experience in creating knowledge is the hallmark of experiential learning. Kolb offers a definition of learning that emphasizes experience. He proposes, "Learning is the process whereby knowledge is created through the transformation of experience" (Kolb, 2014, Summary: A Definition of Learning section).

The Learning Style Inventory was developed to facilitate research and encourage self-reflection on the learning process. The instrument is a nine-item questionnaire that asks the respondent to provide a self-description. The result is a description of the participant's learning style relative to the four modes of learning described as part of the experiential learning process (Kolb, 2014).

Kolb's (2014) emphasis on experience parallels the opening assumption of Knowles's andragogy. Knowles (1975) contended that adults draw from a wide variety of experiences that influence their learning experience. The accumulation of experience indicates that adult learners are better positioned to contribute to the learning experience. Additionally, the broad experience provides a context in which to assimilate new knowledge and experiences. Both Knowles (1975) and Kolb recognize and emphasize the importance of subjective experience for adults in a learning encounter. Coinciding with the appreciation of experience, experiential learning embraces a sense of self-regulation and autonomy in learning. Beard (2023) wrote, "Ideally learners should explore, discover, and find things out for themselves by doing. It follows, then, that the richest resources for learning reside in the learners themselves" (p. 194).

Experiential learning in the context of the Church is well represented in scholarly literature. Hedin (2010) considered the theoretical roots of experiential learning and argued for its value in the context of Christian higher education. Even before that, Hertig (2002) sought to employ experiential learning with a missional emphasis. Nehrbass and Rhoades (2021) point to Jesus's participatory style of teaching as a corollary to experiential learning (p. 75). They advocate for immersive experiences as part of ministry training (Nehrbass & Rhoades, 2021, pp. 85–86). Likewise, Kaak and LaPorte (2022) encourage the intentional use of service projects in Christian higher education paired with an experiential learning process (pp. 11–30). Appreciation for experiential learning within the Church extends beyond a western view or application. Nehemiah (2021) created a volume expressly looking at experiential learning for leadership within the Church in North Africa and the Middle East. The extensive coverage of experiential learning in the context of practical ministry training argues for continued consideration of the confluence of discipleship and adult learning theory.

The practical implications stemming from experiential learning mirror those that might be drawn from SDL. Both theories prize the learner's responsibility for their learning, recognize the value of experiences prior to the learning event, and position the learning in the context of mutuality (Beard, 2023, p. 207). Ultimately, both experiential learning and SDL challenge a pedagogical model of learning that is teacher centric and emphasizes the simple transmission of information.

Transformative Learning

Transformative learning theory was contemporary with SDL, also having its origin in the 1970s. The transformation theory, unlike other models, ties human development to learning. Theories related to transformative learning explore individual change in light of processes

leading to change, environmental factors, and what it means to change (Hoggan & Kasl, 2023, p. 213). Although consideration of "transformative learning" continues to unfold within the adult education community, the term has been popularized, with its meaning becoming less rigid (Hoggan & Kasl, 2023). Still, the emphasis remains on processes that induce lasting change in the individual's interactions with the world. The very aim of transformative learning closely aligns with the work of the Gospel—that is, instigating reflection that "emancipates as it releases one from the constraint of dysfunctional beliefs" (Mezirow, 2000, p. xiii). The text goes so far as to recognize that a standard driver of learning is "human connectedness, the desire to understand, and spiritual incompleteness" (Mezirow, 2000, p. 7).

For transformative learning, the aim is to reevaluate frames of reference to develop new perspectives that emanate from changing habits of mind (e.g., assumptions through which the learner filters their experiences). Mezirow (2000) offers that learning "occurs … by elaborating existing frames of reference, by learning new frames of reference, by transforming points of view, or by transforming habits of mind" (p. 19). Transformation comes through challenging or critically reflecting on assumptions that underlie the content and processes familiar to the learner. The end becomes the learner taking informed and reflective action based on newly gained insight. This learning theory seems consistent with the call to challenge worldviews and assumptions with biblical truth, aiming to see them respond with an intellectual and volitional commitment to the Gospel.

Theories within transformative learning have been criticized for focusing predominantly, if not entirely, on cognitive activity and rational thinking. Another criticism, a postmodern critique, contends that the theory assumes a consistent self that does not change based on situations (Hoggan & Kasl, 2023). Hoggan and Kasl (2023) noted current criticism has focused

on the broader scholarship rather than the underlying theory, with the predominant issue being a misuse of the term (p. 221).

Scholars have addressed various theoretical perspectives when working toward identifying approaches to transformative learning (Hoggan & Kasl, 2023). Of particular interest is the spiritual perspective. For Hoggan and Kasl (2023), spirituality was an exploration of "a sense of connection with something larger that the self" (p. 223). Tolliver and Tisdell (2006) specifically address spirituality in the higher education classroom. Their definition of transformative learning states that the learning "is grounded in one's entire being" (Tolliver & Tisdell, 2006, p. 37). Their definition of spirituality includes a "connection to what is referred to by various names, such as the Life Force, God, a higher power or purpose, Great Spirit, or Buddha Nature" (Tolliver & Tisdell, 2006, p. 38).

Research has considered transformative learning in the context of the local church and theological education. Marmon (2013) broadly presented the concepts of transformative learning theory and advocated for their place in adult Christian education. Nelson (2021) carries it further by approaching transformative learning through the lens of a biblical theology of transformation. Emslie (2016) advocates for transformative learning as a model for initial ministry training. The proposed process is described as "kenotic" as "it requires the learner to be willing to 'empty' themselves of pre-judgements and presuppositions for the sake of personal transformation and for the sake of service to the community of which the minister is a part" (Emslie, 2016, p. 56). Mikaelian (2018) considered transformative learning experience in the context of small group ministry and factors contributing to the experience. The research emphasized the importance of relationships within the small group and with pastoral leadership (Mikaelian, 2018, pp. 182–183). Scholarly consideration extends from broad consideration to specific ministry applications.

The literature on transformative learning theory addressing Christian ministry paradigms demonstrates the existence of a space in which to consider the application of adult learning theory in the context of the church.

The transformative learning theory reflects some attributes found in SDL. Transformative learning's emphasis on an environment that encourages exploration and creates a sense of safety in which to challenge existing preconceptions is more likely than not parallel to the concept of a psychologically comfortable environment within SDL. Both transformative learning and SDL recognize the benefit of mutuality in a learning environment where participants are able to draw from one another's experiences. Finally, transformative learning argues experiences have shaped learners' assumptions and views of the world. Knowles's model of andragogy likewise recognizes, and seeks to exploit, that adult learners enter the learning situation with their prior life experiences that shape their understanding and perception.

Leadership and Organizational Learning

Concepts of organizational learning rely on processes identified in SDL. Argyris (2008) sought to explain why transformational efforts in organizations routinely failed. He proposed that values influence an individual's designs for accomplishing intended ends, called the "theory-in-use." He argued there is consistency in these theories-in-use, characterized as Model I and Model II (Argyris, 2008, p. 391, 2018, p. 60). He highlights differing values that consistently inform strategies or actions (see Table 2). The values of Model I fueled defensive routines that challenged learning. The alternative Model II results in an emphasis on honest investigation, inquiry, and testing (Argyris, 2004, p. 10).

Table 2

Argyris's Model I and Model II Theories in Action

Category	Values
Model I	Achieve your intended purpose. Maximize winning and minimize losing. Suppress negative feelings. Behave according to what you consider rational.
Model II	Produce valid information. Make an informed choice. Vigilantly monitor the effectiveness of implemented actions.

Note. See Argyris (2008, p. 391) and Argyris (2004, p. 10).

The result of Model I consists of self-protective behaviors or thoughts that resist information that challenges underlying values. Argyris (2008) wrote, "Defensive routines are any action, policy, or practice that prevents organizational participants from experiencing embarrassment or threat, and at the same time, prevents them from discovering the causes of embarrassment or threat" (p. 392).

The means to overcome the adverse outcomes of the self-protective and circular processes is a change in individual values—characterized as double-loop learning (Argyris, 2008, p. 393). Argyris (2008) describes:

> The first way is to change the behavior (for example, reduce the backbiting and bad-mouthing among participants in an organization). This behavior-focused approach is single-loop learning. The second way is to change the governing values that lead to counterproductive behavior. This second, values-based approach is double-loop learning. (Argyris, 2018, p. 59)

Argyris (2008) characterizes actionable knowledge as information that "specifies the actions required to effectively implement the intentions of the actors" (p. 389). Argyris (2018) argues, "In contrast to most current policy research and analysis, the process of reasoning from

thought to action at the individual and organizational system levels needs to focus on action" (p. 58). The conclusion of double-loop learning is not simply the acquisition of knowledge but a change in action.

Argyris's concepts of organizational learning are reflected in some process models of SDL. This includes the work of Garrison (1997) and Costa and Kallick (2004). The emphasis on self-monitoring and assessment fits neatly with Argyris's (2008) encouragement to consider one's thoughts and actions and evaluate the outcomes of actions. Much of the Argyris process rests on the individual within an organization recognizing their own learning need, identifying a plan or strategy to meet that learning need, and evaluating whether the employed strategy fulfilled the intended objective. The connection between organizational learning and SDL illustrates the value of SDL in leadership and the theory's benefit to a broader organization, potentially to include the local New Testament church.

The Rationale for the Study and Gap in the Literature

The Bible presents teaching of God's special revelation (i.e., the Bible) as a principal task of the shepherd–teacher. The title of the office itself invokes the title "διδακτικός" (didaktikos), or "teacher." The content of the teaching is the authoritative Word of God, with the aim that the Word, in concert with the Holy Spirit, produces transformation in the hearer's life. The privileged task of teaching such powerful material ought to be viewed with the highest sense of stewardship. Developing competence in this calling is a matter of worship. One ought to aim to offer themselves as a "living sacrifice" and be "transformed by the renewal of … mind" (*ESV*, 2001/2016, Rom. 12:1–2). With a biblical view of worship, the desire is to be and do the very best to represent one's love and commitment to Jesus (*ESV*, 2001/2016, 1 Cor. 10:31, James 1:14). Thus, the shepherd–teacher must be best equipped to teach most effectively. However, a

gap exists within materials addressing homiletics and Christian education concerning incorporation of a contemporary understanding of adult learning as relevant to the preaching moment—or the shepherd–teacher.

A review of the related literature indicated a clear gap and opportunity for the proposed study. The prominence of adult learning theory has resulted in a body of literature that addresses its application in the local New Testament church context. Andragogy has been considered in the context of Sunday school and small group ministry, but not in the context of the preaching moment (Lewis, 1992; Young, 1995). More recent scholarship has addressed andragogy within the amorphous category of spiritual development (Beard, 2017). A review of the current literature failed to identify any texts that considered the implications for the moment of corporate teaching or preaching that might be drawn from adult learning theory. There are multiple volumes available that address Christian education by synthesizing contemporary educational psychology and learning theory. However, corporate teaching (e.g., preaching) receives limited focus in Christian education texts (Stuart, 2011).

Scholarship in the realm of adult learning has increased in the past 5 decades. Theories have been propagated that seek to explain how adults learn. Knowles (1970) offered assumptions addressing how adults learn with his andragogy. These assumptions are especially fitting in the unique learning environment of the local New Testament church and the preaching moment. The context is voluntary, focused on adults, and the measure of achievement is devoid of the traditional means of assessment (e.g., tests).

Further, the Church aims to encourage and equip individual believers to continue to grow. This scope fits neatly with the ends of SDL. As an organizational leader and the principal teacher, the shepherd–teacher would benefit from understanding how adults learn. Further, they

would benefit from understanding how they learn and its relationship with their teaching in the preaching moment.

Profile of the Current Study

The study addressed the shepherd–teacher of the local New Testament church in his principal task of teaching God's word during the preaching moment. The theological framework offered that adults can learn and are also called to be renewed in their thinking. The substance of teaching in the Church is the special revelation of God that instigates, in concert with the Holy Spirit, transformation in the individual life. However, the responsibility for learning is not corporate but individual.

Knowles's theories of adult learning, both andragogy and SDL, are especially suitable for the local New Testament church. The church has the task of engaging adults with life-transforming truth compellingly and effectively in a voluntary setting. The shepherd–teacher benefits from understanding how they learn and its influence on their teaching. The shepherd–teacher is expected to have the capacity to carry out the exegetical and hermeneutical work necessary to prepare a biblically sound sermon. This preparation routinely happens independently and weekly without the benefit of a professor or teacher. Therefore, one could reasonably expect the shepherd–teacher to benefit from the attributes associated with being a self-directed learner. Guglielmino (1978) developed a validated instrument that provides an opportunity to observe the attributes of SDL. This study employed that tool to establish a deeper understanding of the practice of SDL among shepherd–teachers and its influence on their corporate teaching. The study aimed to improve the shepherd–teacher's understanding of the practice of SDL to better equip them for the clear and compelling teaching of God's Word.

Chapter Summary

This chapter addressed the theological and theoretical foundations of the study. The biblical testimony demonstrates the role of teaching as a means of leading believers toward spiritual maturity. Additionally, the Church is gifted an office with a responsibility to provide that teaching faithfully. Meanwhile, much work had been done in the academic realm to develop a more comprehensive understanding of adult learning. The assumptions and theories of Knowles concerning andragogy and SDL form an example of scholarship addressing adult learning theory. Moreover, the concepts of Knowles provided the theoretical foundation of the research. A review of the related literature demonstrated the continuing development of thought in adult learning—and even its incorporation in Christian education. Additionally, the literature demonstrated the confluence of learning and leadership. Still, the Church has not broadly made use of the scholarship in the realm of adult learning theory in the context of corporate teaching (i.e., the sermon). A gap exists in the literature between the fields of adult learning theory and homiletics. This research presented an opportunity to begin a new dialogue and leverage contemporary scholarship to best equip the leaders tasked with faithfully teaching God's Word.

CHAPTER THREE: RESEARCH METHODOLOGY

The study employed a qualitative approach to better understand the shepherd–teacher's role as a self-directed learner in sermon preparation and delivery. The study aimed to develop practical insight with which to better equip the church leader to teach more effectively. The study built on scholarship related to adult learning theory and employed validated instruments and multiple analytical methodologies to build a multiple-case study. This chapter reiterates the problem, purpose, and specific research questions. Additional attention is given to the methodology, setting, participants, role of the researcher, and ethical considerations.

Research Design Synopsis

The Problem

The research problem hinged on the ability of the field of homiletics to be informed by developments in the field of adult learning. This study considered SDL and Knowles's andragogy. Adult learning theories have the potential to impact how the Church does ministry and teaches the Bible. Bredfeldt (2006) contended that the principal means of leadership in the Church is the teaching of God's Word (p. 16). The priority of teaching as a means of leadership has lost its place in administrative and executive functions (Bredfeldt, 2006, p. 37). Bredfeldt (2006) offered, "Christian leaders must recapture and rediscover the biblical role of the leader-that of being a godly teacher of the Word of God" (p. 38). The shepherd–teacher stands to benefit the most by developing an understanding of adult learning and its influence on sermon development and delivery. The insight developed in this study prayerfully restores a focus on effectively teaching the Word of God as the principal means of leadership in the Church.

Purpose Statement

The purpose of this qualitative multiple-case study was to explore the influence of the shepherd–teacher's learning attributes, informed by adult learning theory, on the preparation, presentation, and perception of the preaching moment within a conservative Southern Baptist congregation. Knowles (1970, 1975) offered the theory guiding this study in his andragogy and SDL. Knowles (1975) introduced an educational model that emphasizes adult learning and primarily SDL. The study attempted to observe whether being a self-directed learner impacts the shepherd–teacher's instructional activities, including preparation and delivery.

Research Questions

RQ1. What awareness do shepherd–teachers have of their process of learning and learning preferences?

RQ2. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform their instructional and planning activities?

RQ3. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform the content and delivery of the preaching moment?

RQ4. How does the perception of the shepherd–teacher's attributes of SDL inform a hearer's perception and view of the content and delivery of a sermon?

Research Design and Methodology

The study took a qualitative approach as a multiple-case study. Yin (2016) contended that the qualitative approach allows you, as a researcher, to "connect your study to something you care about passionately in your own personal or professional life—families, peers or other groups of people, organizations, cultures—and even causes and campaigns" (p. 4). The qualitative approach fit the real-life work of communicating biblical truth combined with a pragmatic worldview. Additionally, Yin (2018) described specific conditions that influence the selection of a research method. The text suggested a case study is fitting if a research question is framed in terms of explaining how or why and addresses contemporary social phenomena (Yin,

2018, p. 9). He wrote, "'How' and 'why' questions are more explanatory and likely to lead to a case study, history, or experiment as the preferred research method" (Yin, 2018, p. 10). This study addressed a contemporary social phenomenon, the preaching moment, and attempting to control the behavioral events for the conduct of an experiment may have proved ethically challenging. Thus, a case study was selected as the research methodology for this study.

A simplistic definition is insufficient to characterize the breadth of what might be considered qualitative research. Yin (2016) responds by presenting five unique elements rather than a strict definition. For Yin (2015, p. 9), qualitative research is marked by

- studying the meaning of people's lives in real-world contexts,
- representing the perspective and views of the participants,
- considering and accounting for real-world contextual conditions,
- contributing insights from a new or existing theory that help explain behaviors and thinking, and
- acknowledging the relevance of multiple sources rather than strictly relying on a single source.

A variety of research approaches fit these distinctive elements. Yin (2016) notes that no one has created a definitive inventory of the variants of qualitative research (p. 8). Still, he acknowledged commonly recognized variants (e.g., case study, ethnography, and grounded theory). Gournelos (2019) offers that a case study considers "a specific instance, often focusing on a business or a person, that might explain or be paradigmatic of a broader trend or issue" (p. 60). The study relied on observational analysis in the form of a multiple-case study. Yin (2016) describes a multiple-case study. Rozsahegyi (2019) calls it a "collective case study" and states a study that uses more than one instrumental case for analysis will bring about a greater understanding and better theorizing with which to expand the inductive value (p. 125). The case study for this research relied on multiple means of qualitative data collection to triangulate the

data and increase credibility and reliability and support richer analysis to explain the relationship between the shepherd–teachers' learning preferences and preparation and delivery of sermons. The study included data about the participants collected via the LPA (formerly the SDLRS). Other methods of collection included interviews, researcher observations, and focus groups.

Rozsahegyi (2019) states that "case study is a research design which is particularly suitable for developing, extending and deepening understanding and knowledge about aspects of the real-life world" (p. 124). The study included in-depth interviews to gather the shepherd–teachers' perceptions of their learning processes and preferences and instruction and planning practices. In-depth interviews are "structured, semi-structured, or unstructured, interviews often conducted with fewer participants but in great depth, usually from 1–2 hours … to get participants to tell stories and explore concepts in detail, often with follow-up questions or examples" (Gournelos, 2019, p. 53). This collection method directly corresponded to RQ1 and RQ2. Gournelos (2019) recommends selecting a research method based on the categories of creation, portrayal, and representation or perception/reception. Content that "has been created to represent the world in some way" focuses on portrayal and representation (Gournelos, 2019, p. 48). Perception/reception considers the response (e.g., feelings or thoughts) to the content. This research study considered content created in preparation for the teaching moment and the resulting rhetoric presented in the teaching moment. Based on Gournelos's (2019) recommendations, this content lent itself to content analysis (p. 50). Content analysis is the "reading of a large number of the same sorts of texts, usually with the aid of explicit 'coding' in which commonalities and differences are examined across all texts and charted" (Gournelos, 2019, p. 50). This analysis allowed the researcher to pursue answers to RQ2 and RQ3 regarding

observations in the sermon preparation and preaching moment based on the shepherd–teacher's attributes as a self-directed learner.

Case studies require deliberate processes and implementation to overcome criticism that they represent a less desirable research method. Yin (2018) writes, "Too many times, a case study researcher has been sloppy, has not followed systematic procedures, or has allowed equivocal evidence to influence the direction of the findings and conclusions" (p. 18). He describes an iterative five-part process for executing a case study as a variant of the qualitative method that includes planning, preparing, designing, collecting, analyzing, and sharing the results (Yin, 2018, p. 2). Much attention is given to the process of research design. Yin (2018) offers that there is no standard catalog of case study designs (p. 25). Thus, the process is not linear. The researcher may move between collecting data and refining the study design (Yin, 2018, p. 2). Analysis is another crucial element in the process. Hamilton and Corbett-Whittier (2013) offer that some consider qualitative data analysis as an afterthought in the research design. Instead, Hamilton and Corbett-Whittier (2013) advise that analysis "needs to be an integral part of your research design as decisions need to be made about how the data will be collated, stored, reviewed and evaluated" (p. 135). Following analysis, both Yin (2018) and Hamilton and Corbett-Whittier highlight communicating the findings as a final measure when conducting a case study. Hamilton and Corbett-Whittier (2013) say that "writing your case study can be the most difficult but also the most rewarding part of the research process" but acknowledge this step allows the findings to help others and add to a body of knowledge (p. 169).

Setting

The study occurred in the context of local New Testament churches affiliated with the SBCV. The "conservative" moniker indicates the congregations, and their shepherd–teachers, placed a high value on the authority, reliability, and sufficiency of Scripture. Additionally, these congregations pointed to the moment of corporate teaching (i.e., the sermon) as the principal feature of the time spent in corporate worship. Data related to the specific geographic, demographic, and cultural considerations of the church affiliated with each case were collected using publicly available data from the denominational entity and during the in-depth interview with the shepherd–teacher. The educational level of the shepherd–teacher was an essential attribute of the setting considered in the study. The resulting data are reported using pseudonyms or unidentifiable labels for each research site.

Participants

The sample consisted of voluntary participants, each of whom served as the primary shepherd–teacher in a conservative Southern Baptist church located in Virginia. Conservative beliefs were identified by congregational commitment to the Baptist Faith and Message 2000 and affiliation with the SBCV. This pool of participants was chosen primarily to support the researcher's access. Yin (2018) writes, "You need sufficient access to the data for your potential case—whether you interview people, review documents or records, or make field observations" (p. 25). The researcher sought participants who were generationally and ethnically diverse. A questionnaire was employed to identify shepherd–teachers willing to participate in the research. The researcher attempted to use the state-level denominational entity (i.e., SBCV) as a gatekeeper and means to disseminate the initial questionnaire. The researcher aimed to recruit at least four shepherd–teachers to form the basis for the multiple-case study. A best effort was

made to identify congregations similar in size, setting (e.g., urban, rural, or city), and pastoral tenure. Yin (2018) notes, “Single-case studies can yield invaluable insights, [but] most multiple-case studies are likely to be stronger than single-case studies” (p. 63). The selection of the second case followed Yin’s (2018) direction toward using replication rather than sampling logic (p. 121). Participants in the research were identified using anonymous codes to preserve the privacy and confidentiality of voluntary participants.

Role of the Researcher

Creswell (2018) writes, “Qualitative researchers collect data themselves through observing documents, observing behavior, or interviewing participants” (p. 180). The researcher behaved as a participant–observer by engaging with the sermon content in the preaching moment. Yin (2016) offers that participant–observer data collection has been practiced for more than 100 years in anthropology and sociology (p. 129). However, he points out that this approach requires an increased awareness of the researcher’s idiosyncrasies and biases (pp. 130–132). The researcher used a field observation notes worksheet created during research preparation to record data as an observer–participant. Beyond being a participant–observer, the researcher facilitated focus groups and individual interviews with the shepherd–teacher. The researcher’s theological commitments and training, which include graduate training at a Southern Baptist seminary, more likely than not influenced the analysis of sermon content, delivery method, and preparation. Yin (2018) emphasizes that case studies place a unique intellectual and emotional burden on the researcher. He writes, “A well-trained and experienced researcher is needed to conduct a high-quality case study because of the continuous interaction between the issues being studied and the data being collected” (Yin, 2018, p. 82). Before engaging in data collection, the researcher prepared to follow Yin’s (2018) advice and worked to hone the skills of asking good questions,

listening well, and maintaining solid ethical commitments. The researcher avoided recruiting participants with whom they had an established ministry relationship, such as current or past ministry team members.

Ethical Considerations

Yin (2016) highlights that qualitative studies can generate tension for ethical review. He writes, “Do not be surprised that at some institutions, reviews of planned qualitative research studies have produced a highly charged atmosphere” (Yin, 2015, p. 48). However, the researcher made deliberate efforts to consider ethical concerns. Gournelos (2019) writes that “your research isn’t as important as the people (or animals) you’re studying” (p. 52). He points out the necessity of advising participants and receiving agreement that they acknowledge they consent to being studied (Gournelos, 2019, p. 53). Rozsahegyi (2019) summarizes a range of ethical consideration, which include “maintaining informed consent, avoidance of harm and negative experiences, and respect for the participants’ cultural, social, and professional backgrounds” (p. 128). Obtaining informed voluntary consent from the shepherd–teachers was a critical ethical concern. The researcher followed the advice of Hamilton and Corbett-Whittier (2013) in developing a consent form. Hamilton and Corbett-Whittier (2013) write that consent forms should be “signed and in place before any research begins. Such forms should describe the aims and purpose of the research, methods to be used for data collection (such as observation, interviews, or surveys), a timeline and so on” (p. 72). These forms advised participants of the right to withdraw or refuse to participate at any research stage. To ensure the study’s ethical foundation, the researcher acquired approval from the Liberty University IRB before conducting any research. The IRB approval letter for the research is included as Appendix A. The process included submitting and receiving approval for consent forms and recruitment materials.

Approved versions of the informed consent to participate in the study are included as Appendix B (pastor) and Appendix C (focus group participants). This is followed by the approved recruitment templates and follow-up communication as Appendix D and Appendix E. A brief screening survey was used as part of the recruitment process. The screening survey was also approved by the IRB. The approved questions are included as Appendix F.

Data Collection Methods and Instruments

This section includes information about the methods of data collection, instruments used in that data collection, and procedures and approvals followed in data collection, including the Liberty University IRB approval process.

Collection Methods

Rigorous data collection techniques mark credible qualitative inquiry. The student relied on observational analysis in the form of a multiple-case study. Gournelos (2019) offers that a case study considers “a specific instance, often focusing on a business or a person, that might explain or be paradigmatic of a broader trend or issue” (p. 60). Rozsahegyi (2019) described a collective case study. He offered that a multiple-case study uses more than one instrumental case for analysis to increase understanding and theorizing with which to expand the inductive value of the study (p. 125). Yin (2018) noted that some academic fields consider single-case and multiple-case studies as distinct methodological approaches with different rationales. However, he argues that both are variants of the case study methodology (Yin, 2018, p. 54). Both rely on multiple means of qualitative data collection to triangulate the data to increase credibility and reliability and to support richer analysis to explain experiences and relationships.

Instruments and Protocols

Yin (2018) offers that there is no standard catalog of case study designs (p. 25). Thus, the process is not linear. A researcher may move between collecting data and refining the study design. However, the data collection methods relied on for case studies have been well developed in broader qualitative research. The researcher relied on established processes of data collection to execute interviews, administer a validated instrument to discern characteristics of SDL, host focus groups, and conduct document analysis.

Surveys/Questionnaires

This study relied on the SDLRS as a validated instrument to operationalize the concept of SDL and guide focus in other data collection methods, such as interviews and focus groups. This instrument aims to measure an adult's preparedness for SDL. It was created by Guglielmino (1978). The tool marked an essential step in empirical understanding of andragogy and SDL. It has been characterized as the "most notable empirical instrument" associated with studying andragogical concepts (Taylor & Kroth, 2009, p. 9). The tool is a Likert-type scale consisting of 58 items, each of which asks respondents to self-report the degree to which the statement accurately describes their attitudes, beliefs, actions, or skills (Guglielmino & Guglielmino, 2020).

The scale was not accepted uncritically. Field (1989) raised concerns about using a Delphi study, the definition of terms like "readiness" and "self-directed learner," negatively phrased items, and incorporation of additional items after validation (pp. 125–139). Each of these challenges was answered by Guglielmino (1989), who noted the Delphi study did not create the items in the scale but instead sought consensus among noted scholars in the field on characteristics of self-directed learners (p. 236). Additionally, a meta-analysis of research related

to SDL documented that the SDLRS was the most used instrument and recorded validation studies with observed Cronbach's alpha reliability coefficients between .793 and .950 for the SDLRS (McCune, 1988, pp. 15, 53). Additionally, Delahaye and Choy (2000), in a review of the SDLRS, concluded the assessment "can be used with acceptable confidence to provide an accurate measurement of readiness for self-directed learning" (Results and comments section).

Merriam and Bierema (2014) contend that "connecting SDL to other fields to build a richer understanding of it" is a continued cause for its relevance and innovation (p. 78). Guglielmino continues to provide access to the SDLRS in the form of the LPA, after renaming the original instrument to avoid response bias (Guglielmino & Guglielmino, 2020). The instrument helped to operationalize the concept of SDL and informed concepts that became part of the content analysis. It supported the exploration of the influence of SDL attributes on the shepherd–teacher in their preparation and delivery of the preaching moment by allowing the researcher to screen for capacity as a self-directed learner among the shepherd–teachers. Data gathered were foundational to answering RQ2, RQ3, and RQ3. The data gathered informed other data collection methods, including the interviews and focus groups.

The instrument was beneficial by providing shepherd–teachers with an opportunity to understand their learning preferences and self-directedness in learning. Results of the assessment were shared with the participants. Copies of the results were retained after replacing each participant's name with an anonymous code to allow association of data and cases while ensuring the participants' privacy.

Interviews

Rozsahegyi (2019) states that "case study is a research design which is particularly suitable for developing, extending and deepening understanding and knowledge about aspects of

the real-life world" (p. 124). The study included in-depth interviews to gather the shepherd–teachers' perceptions of their learning processes and preferences and instruction and planning practices. The shepherd–teacher in each of the four sampled churches was invited to participate in an interview. This collection method aimed to gather data needed to answer RQ1 and RQ4. In-depth interviews are "structured, semi-structured, or unstructured, interviews often conducted with fewer participants but in great depth, usually from 1-2 hours … to get participants to tell stories and explore concepts in detail, often with follow-up questions or examples" (Gournelos, 2019, p. 53). The researcher conducted formal interviews at specifically scheduled times and recorded the content to facilitate analysis (Olson, 2016, p. 35). The researcher preferred to allow each participant the opportunity to provide more in-depth responses. Olson (2016) noted that a weakness of the structured interview is its limitation of responses to only the included questions (p. 35). Instead, the researcher began with what Olson (2016) describes as a "guided interview" (p. 40). The researcher provided three to four broad, general questions to allow a participant to tell their story. The initial questions for the guided interview and their rationale are provided in Table 3. The guided interview allowed the researcher to gather additional information that could be used in follow-up semistructured interviews that were more focused and allowed clarification (Olson, 2016, pp. 40–41). The results from the LPA informed the semistructured interviews.

The researcher discussed the most prominent SDL attributes based on the instrument. The approach assisted each shepherd–teacher by educating them about their learning preferences. Questions that shaped the semistructured interviews are noted here in Table 3 along with their rationales based on the theoretical literature.

Focus Groups

Morgan (1997) characterizes the focus group as a distinct data collection method for qualitative research that blends participant observation and open-ended interviews (p. 8). The focus group allows the researcher to gather a large amount of data in a more limited time (Morgan, 1997, p. 8). However, it creates an unnatural social setting. This weakness is offset by allowing the researcher to observe group interaction on the topic. Morgan (1997) describes the ability to focus on the research interest and gather concentrated data as a distinct advantage of the focus group method (p. 13).

Table 3

Guided Interview Questions

Question	Rationale
Can you explain how you select the topic, theme, or focus of your sermon?	The self-directed learner can identify informational needs and goals (Senturk & Zeybek, 2019, p. 152).
Will you describe how you go about preparing content for your sermon?	The self-directed learner can select effective strategies for using learning resources (Knowles, 1975, pp. 23–24).
Would you help me understand your goal or desired effect when you prepare a sermon?	The self-directed learner can translate learning needs into objectives (Knowles, 1975, pp. 23–24).
Can you describe your experience the last time you learned a new skill or ability?	The self-directed learner demonstrates initiative and independence in learning (Guglielmino, 1978.

The focus group allowed the researcher to gather data to answer RQ4. Questions presented to the focus group were drafted before the focus group occurred, creating a semistructured format. The development of focus group questions was informed by the data collected by administering the SDLRS to each pastor–teacher, data from the site observations, and pastoral interviews. The guiding questions are included as Appendix G. Focus groups

present unique ethical challenges. The information shared with the researcher was simultaneously shared with the group. The researcher offset this concern via high moderator involvement and by avoiding discussions that could engender concerns about privacy. The conversation focused on attributes of SDL and perceptions of the preaching moment.

The focus groups were expected to yield insight from the hearers into their perceptions of content and delivery of the preaching moment. Unlike in individual interviews, the object of analysis was the group. Morgan (1997) writes, “Nearly all discussions of analysis issues in focus groups assert that the group, not the individual, must be the fundamental unit of analysis” (p. 60). The researcher relied on the shepherd–teacher as the gatekeeper. The researcher conducted one focus group for each case. Participants for the focus group were selected with a purposive sampling strategy that included only participants in the physical preaching moment and attempted to achieve diverse generational and ethnic representation consistent with the research setting. The segmentation attempted to establish homogeneity only with respect to participation in the preaching moment (Morgan, 1997, p. 36). The researcher abided by Morgan’s (1997) rule of thumb that each group consist of six to 10 participants (p. 34). The groups gathered following the preaching moment, in which the researcher was also an observer–participant. Participants’ names were recorded only for completion of consent documents, with access to the completed documents limited to the researcher. With the permission of the participants, the focus group was audio recorded. The researcher adhered to the advice of Morgan (1997) by limiting access to the recordings to research staff (p. 31). Additionally, the researcher documented the responses via written transcripts, which were anonymized and associated only with the research site codes.

The study, up to the point at which data were collected via focus groups and observation–participation, mainly focused on the shepherd–teacher. However, the focus group filled a critical

gap in data collection by gathering insight from the hearers. The focus on the hearers was significant given that the preaching moment aims to instigate transformation in hearers.

Observation–Participation

The researcher collected data as an observer–participant. Observation–participation is "a method in which a researcher takes part in the daily activities, rituals, interactions, and events of a group a people as one means of learning the explicit and tacit aspects of their … routines and their culture" (Dewalt & Dewalt, 2010, p. 12). The researcher conducted a site visit for each case and participated in the preaching moment as a hearer. The researcher's presence allowed data collection that included the physical and audible response of the congregation to the content and delivery of the preaching moment. Dewalt and Dewalt (2010) wrote that "writing field notes is virtually the only way for a researcher to record the observation" (p. 138). Therefore, the researcher documented the observations using a structured observation worksheet completed prior to beginning the research and approved by the IRB. A copy of the approved field observation worksheet is included as Appendix H. The completed observation worksheets were included in the research record. The data collected as an observer–participant supported answering of RQ3 and RQ4.

As a participant–observer, the researcher became a principal instrument of data collection. This role posed a unique challenge with regard to mitigating preconceptions and bias. Yin (2016) calls on the researcher to maintain an inductive mindset during fieldwork to allow the experience to inform and influence research results. He wrote, "Preconceptions to be minimized come not only from your personal beliefs but from the initial theoretical presuppositions that might have led to your study" (Yin, 2015, p. 131). To mitigate theoretical and personal biases,

the researcher postponed the development of categories and propositions, including the ontology used for data coding, until after the field experience as a participant–observer was complete.

The participation–observation portion of the fieldwork included site visits to each church where the shepherd–teacher had agreed to participate in the study. The practice of the site visit is a primary benefit and feature of a qualitative study. Yin (2016) noted that "few specialists in other disciplines recognize that they even may perform site visits routinely" (p. 133). The site visit was more structured than the typical participant–observer interaction (Yin, 2015, p. 134). The researcher observed the preaching moment in the way any other hearer would and scheduled the visit to incorporate the planned time needed to execute the focus group following the preaching moment.

Document Analysis

This research study considered rhetoric presented in the teaching moment. Based on Gournelos's (2019) recommendations, this content lent itself to content analysis (p. 50). Content analysis is the "reading of a large number of the same sorts of texts, usually with the aid of explicit 'coding' in which commonalities and differences are examined across all texts and charted" (Gournelos, 2019, p. 50). The researcher collected at least two samples of sermons from each study participant. The samples were collected from publicly available sources, such as the church's website. The samples were from sermons delivered in the previous year. The content was reviewed and coded in a way consistent with the process described in the Data Analysis section.

Procedures

Before commencing the research, the researcher received approval from the Liberty University IRB. The student drafted proposed recruitment materials—including an email letter,

screening questionnaire, and follow-up letters—using templates provided by the IRB. The researcher collected written permission from Guglielmino & Associates to use the LPA. The LPA and interview questions were provided to the IRB with the consent and debriefing forms.

Following IRB approval, the researcher leveraged church contact information stored with the state-level denominational entity, the SBCV, to distribute recruitment materials to shepherd–teachers to identify voluntary participants. An initial online screening survey identified the name, role, serving location, congregation size, and identifying and demographic information of the shepherd–teacher. The questions included in the initial screening survey are recorded in Appendix F. The screening survey was provided via SurveyMonkey. Prospective participants were provided with a clear explanation of the research process (e.g., data collection methods), research purpose, and voluntary nature of the research prior to taking the screening survey.

After receiving the initial questionnaires, the researcher selected cases consistent with the method described above. The researcher communicated with each prospective participant via phone or email, provided the informed consent forms, and answered any research-related questions. Following receipt of the consent form, the researcher scheduled the interview and provided instructions for completing the LPA via a digital medium. All data collected were subsequently anonymized using an alphanumeric case code. However, participants did receive their individual results from the LPA.

Data Analysis

Analysis is a critical element in the process of multiple-case study. Hamilton and Corbett-Whittier (2013) offer that some researchers consider qualitative data analysis to be an afterthought in the research design. Instead, Hamilton and Corbett-Whittier (2013) advise that

analysis "needs to be an integral part of your research design as decisions need to be made about how the data will be collated, stored, reviewed and evaluated" (p. 135).

Analysis Methods

Yin (2018) criticizes the historical practice of embedding data, or evidence, in the text presented as the case study report. Instead, he argues that the researcher should maintain a database of the evidentiary material used to support the findings (Yin, 2018, p. 130). Following Yin (2018), the student created an electronic repository. The repository used a secure folder on Microsoft OneDrive to store collected data, including pastoral interview transcripts, sermon samples, focus group transcripts, and field observation notes. All hard copy documents were scanned into a digital format. The process, coding legend, and resulting interpretation were captured in the final study report and added to the electronic repository. Additionally, the analytical software, MAXQDA (version 2022), created a study file that contained the document set, coding schema, and notes created by the researcher during the analytical process. This file was included in the repository. The repository will be maintained for at least 5 years following the conduct of the study. During the research process, the repository allowed the researcher to collate and store the data according to an ontology informed by the cases (e.g., site codes "LHBG," "NSDK," etc.) with subfolders for the data collection methods (i.e., pastoral interviews, sermon samples, hearer focus groups, and field observations). The data were then subjected to multiple qualitative analytical strategies to explore solutions to the research questions.

Theoretical Propositions

The researcher approached the analytical process with a general analytic strategy characterized by Yin (2018) as relying on theoretical propositions (p. 168). In this case, the

theoretical propositions were derived from Knowles's characterization of andragogy and its application in SDL. Analysis subsequently involved coding, or "taking raw data and raising it to a conceptual level," to help identify and explore concepts and categories related to SDL (Corbin & Strauss, 2008, p. 66). In concert with relying on theoretical propositions, the researcher followed Corbin and Strauss's (2008) suggestion to use the analytic tools labeled "theoretical comparison." They described the mechanics of theoretical comparison as using "the experience from our own life or the literature that might be similar to a phenomenon that we are studying and start[ing to] thinking about it in terms of its properties and dimensions" (Corbin & Strauss, 2008, pp. 75–76) The researcher relied on theoretical literature described in Chapter 2 to consider the properties of shepherd–teachers' attributes and their preparation and presentation of the preaching moment as a learning event.

Cross-Case Analysis

The study leveraged the value of a multiple-case study by conducting cross-case analysis. Yin (2018) advocated for a case-based approach that retains the integrity of the case rather than reducing the data to individual variables (p. 196). The student identified and compared within-case patterns across the cases. Yin (2018) used the term "cross-case synthesis" (p. 196). The researcher identified within-case patterns first. For this study, the student considered the results of the LPA, pastoral interview, and sermon content to discern whether the shepherd–teacher employed different preparation and teaching strategies. Following some tentative conclusions, the researcher reviewed the cases, searching for replicative relationships between the cases. This analysis aimed to leverage the data to explore how the shepherd–teacher's sermon preparation and teaching changed with the varying presence of the attributes associated with SDL (i.e., RQ1). Additionally, comparing cases for which there was variance in the results of the LPA

complemented the observational data regarding how attributes of SDL influenced the content of the sermon. The cross-case analysis added a more deductive element to the study by starting with the theoretical models of adult learning and evaluating how they worked in sermon preparation and delivery.

Examining Rival Explanations

The researcher augmented the consideration of theoretical propositions by seeking to explore rival explanations (Yin, 2018, p. 172). The researcher highlighted instances in which the observed phenomenon was plausibly the result of some other influence or intervention rather than an illustration of the concepts associated with SDL. This was often a direct rival represented by formal homiletical training undertaken previously by the shepherd–teachers. Initially, the researcher intended to employ explanation building, as explained by Yin (2018). Explanation building is most closely associated with explanatory case study (Yin, 2018, p. 180). However, the study's broad exploratory nature challenged the researcher's ability to pursue explanation building as planned. In handling the data, it was determined it would be premature to attempt to develop causal sequences necessary to conduct explanation building.

Content Analysis

The pastoral interviews, sermon samples, and focus groups were transcribed into documents. Cyr (2019) advocates, especially for focus group data, that transcription facilitates analysis while increasing its rigor and reliability (p. 86). The resulting data were synthesized using the process described by Altheide (1996, pp. 24–44). The researcher was also influenced by concepts from Cyr, especially with regard to interacting with data from the focus groups. This included beginning cursory attempts at analysis close to the time of data collection while conversations and interactions were fresh in the mind (Cyr, 2019, p. 91). Subsequently, the

researcher created a protocol consistent with Altheide's guidelines for document analysis to continue a more systematic analysis. Altheide (1996) indicates, "Qualitative document analysis relies a good deal on text, narrative, and descriptions. For this reason, protocols for qualitative document analysis tend to be less precise and short, often having a dozen or fewer categories" (p. 27). The initial protocol was developed based on the characteristics and behaviors of SDL described by Guglielmino (1978) and Knowles (1975) and initial ideas and interpretations formed during the researcher's review of recordings in the immediate aftermath of the interviews and focus groups.

Consistent with Altheide (1996), the final protocol was developed throughout the research process, with the final version emerging over several drafts (p. 27). The protocol included concise summaries of concepts associated with SDL developed from interaction with the theoretical literature described in Chapter 2. The final protocol is included as Appendix I. The researcher leveraged the protocol to review the documents multiple times to code and compare SDL-related concepts. The researcher employed analytical software (MAXQDA, Version 2022) to assist with the coding process and recorded memos during the coding process to capture analytical decision points, definitions, and concepts. Altheide argued that the aim is to understand the process and meaning of the documents. He claimed, "This occurs as the researcher interacts with the document; only if computer software helps this process should it be used" (Altheide, 1996, p. 43). The researcher found that Cyr's (2019) affirmation that the use of software "can help make your data analysis more systematic" was accurate (p. 98). The computer software aided the conduct of multiple reviews of the documentary data sets, visualization of the frequency of certain concepts, and comparison of the presence of concepts across multiple cases to support cross-case analysis and exploration of theoretical propositions.

Trustworthiness

In qualitative research, the standard is trustworthiness. This section discusses the criteria for evaluating the trustworthiness of the qualitative research with regard to its credibility, dependability, confirmability, and transferability. The multiple-case study benefits from the use of multiple data collection methods to provide the researcher with "assurance that they are seeing and hearing … assurance they are not oversimplifying the situation" (Stake, 2006, p. 33). The researcher undertook the following approaches to increase the trustworthiness of the study.

Credibility

The research employed a multiple-case study methodology. Sampling multiple cases is worthwhile when it increases the validity and trust in the research through replicated patterns (Ridder, 2019, p. 166). Credibility is the extent to which one can be assured that the results accurately describe reality. Merriam and Tisdell (2015) speak to qualitative research and credibility when they argue that

> human beings are the primary instrument of data collection and analysis in qualitative research, interpretations of reality are accessed directly through their observations and interviews. We are thus "closer" to reality than if a data collection instrument had been interjected. (pp. 243–244)

Additionally, the processes of triangulation with multiple data sources, collection methods, and analytic techniques were incorporated into the study (Merriam & Tisdell, 2015, p. 245; Stake, 2006, p. 33). Stake (2006) asserts that each finding requires at least three confirmations to ensure the critical meaning is not missed or misinterpreted (p. 33). The researcher designed a study that relied on multiple data collection methods subject to multiple streams of analysis. This effort was specifically aimed at producing results that provided a credible exploration of the influence of adult learning theory in the preaching moment in the local church. Thus, the research also employed member checks or respondent validation by

soliciting feedback on the preliminary findings from the shepherd–teachers interviewed (Merriam & Tisdell, 2015, p. 246).

Dependability

Merriam and Tisdell (2015) explained that dependability for qualitative research "wishes outsiders to concur that, given the data collected, the results make sense—they are consistent and dependable" (p. 251). In response, they suggest triangulation, peer examination, and an audit trail as measures to ensure consistency. Triangulation within this research was previously addressed in the discussion on credibility. This research study was also part of the academic pursuit of a doctoral degree. Thus, it was subject to examination by a faculty mentor and dissertation committee. Merriam and Tisdell (2015) noted that "all graduate students have this process built into their thesis or dissertation committee since each member of the committee reads and comments on the findings" (p. 249). The researcher maintained documentation of the data collection process, derivation of categories, and decision making throughout the inquiry. The documentation was recorded in a research journal included as part of the evidentiary database that was digitally stored and retained.

Confirmability

Yin (2018) contends that a researcher relying on case study methodology should "set high standards in describing … methods" (p. 233). This proved more challenging given the researcher's commitment to multiple data collection methods and analytical approaches. Still, the processes were well documented during the conduct of the research and captured with the data. The interview protocol, sample documents, coding schemes, analytical notes, and assessment results were captured and retained. The researcher followed Yin's (2018) direction to retain all

data in an accessible form (e.g., a digital database). In addition, the anonymized raw data may be made available to other researchers at their request.

Transferability

The local church is an ideal setting for the study of adult learning theory. It is voluntary, not subject to strict achievement measures, adult oriented, and generally a comfortable environment (Rachal, 2002). However, the study was relevant to the local church in its mission to equip followers. The bounds of this study were constrained to conservative Southern Baptist congregations. Still, the research provided a foundation for delving deeper into understanding adult learning theory in the context of the preaching moment. The shepherd–teacher was encouraged to better understand and consider their learning style and its influence on development of sermon material.

Chapter Summary

The researcher conducted a qualitative study that employed the multiple-case study method to better understand the influence of adult learning theory on the preaching moment in the local church. The research focused on the primary teaching pastor, or shepherd–teacher, in a conservative Southern Baptist congregation setting. Cases were subject to multiple data collection methods. The researcher used interviews, delivery of the LPA, and document analysis. The aim was to discern the shepherd–teacher’s understanding of their learning preferences and the influence of attributes associated with SDL, as reflected in the preaching moment. The use of multiple data collection methods with multiple cases provided an opportunity to gather a rich volume of data. The analytical methods applied to the data followed the recommendations of noted scholars who have focused on qualitative research—Yin (2018) for cross-case analysis and explanation building and Altheide (1996) for document analysis. The researcher aimed to

develop a trustworthy study that raised questions regarding integration of adult learning theory and its application to teaching in the Church via the hallmark of many evangelical services, the sermon. That being said, the study transcended the benefits of a mere academic exercise and created curiosity about and appreciation of the application of adult learning theory to improvement of the effectiveness of communication of the Gospel of Jesus Christ.

CHAPTER FOUR: ANALYSIS OF FINDINGS

Overview

This chapter presents the research findings from the semistructured interviews, field observations, focus groups, and document analysis. The findings were collected as part of a multiple-case study. The results include findings from four different research sites, all of which were smaller (generally less than 150 congregants) Southern Baptist churches in suburban or rural context. All the sampled shepherd-teachers demonstrated an expository style of preaching. The data were organized according to protocols established for each document set. Analytical software aided in the organization and visual presentation of the data to facilitate analysis. The data were collected to answer research questions related to the application of adult learning theory in the context of the preaching moment in a local New Testament church, with a particular interest in the prevalence of self-directed learning (SDL) in the pastor primarily responsible for delivering the sermon. The aim was to explore the influence of the pastor's learning qualities on the preparation, presentation, and perception of the preaching moment. Data collection was successful in exploring the research questions. However, the process was also an opportunity to consider potential improvements to the research design.

Compilation Protocol and Measures

The researcher initially attempted to recruit research sites by communicating with the Southern Baptists Conservatives of Virginia (SBCV) regarding the potential to email a recruitment letter to partnering churches. Additionally, the researcher gathered contact information for churches partnered with the SBCV via their public website. An email with the recruitment letter was then sent to all participating churches for which an email address was available. The email included a web link to the initial screening survey. After 1 week, the

researcher sent a follow-up email to the same churches, reminding them of the opportunity to participate in the study.

Initially, the researcher was surprised that the recruitment identified only six prospective research sites. The researcher then contacted each of those six sites via individual emails and phone calls to provide directions for continued participation. Only two sites responded to the follow-up emails and phone calls. The researcher expanded recruitment efforts, given the research planned to involve four to five cases. The additional recruitment involved communicating with a regional strategist for the SBCV. Several churches that would fit the research parameters were suggested. The researcher then sent the recruitment email to the pastors' addresses for those congregations. Finally, the researcher recruited two more cases, leveraging the input of the SBCV regional strategist.

The researcher then emailed the pastor at each site the instructions for accessing and completing the web-based Self-Directed Learning Readiness Scale (SDLRS) assessment. The researcher allowed the participants 2 weeks to complete the SDLRS. At the end of that period, two participants had not completed the SDLRS. The researcher resent a copy of the email with the access instructions. The email was followed up with a phone call. All sites completed the SDLRS. Results from the SDLRS were immediately available to the participants at completion of the assessment. Simultaneously, the researcher could access the SDLRS scores via a web portal.

With all the assessment scores in hand, the researcher contacted each site via phone and email to schedule the initial semistructured interview with the pastor. Next, the researcher traveled to each research site to conduct the interview. The audio of the interviews was recorded and transcribed into a written document using transcription software. The researcher manually

checked the quality. The researcher simultaneously listened to each interview and checked the written transcript for accuracy with respect to terms and attribution (to the researcher or interviewee).

After the semistructured interview, the researcher coordinated with the pastor to schedule the site visit during a routine corporate worship service for field observation and to conduct a focus group with a sample of congregants. The researcher traveled to each site and used the prepared field observation protocol to collect notes throughout the visit and during the preaching moment. The field notes were collected and included as part of the document analysis.

While at each research site, the researcher completed the focus group with a representative sample of participants in the corporate worship service. In addition, flyers previously approved by the IRB were posted in shared areas of the research site. The researcher was introduced during announcements, with church staff extending an invitation to participate in the focus group in a designated meeting location. The researcher met the group participants in the designated meeting space and distributed the IRB-approved consent forms. When the group had reached at least six participants, the researcher introduced himself, ensured the consent forms were completed, and indicated the focus group would be recorded.

Demographic and Sample Data

The research was limited to churches affiliated with the SBCV. This limitation was imposed to create an achievable and well-scoped research design. Ultimately, four research sites were recruited. Each research site was labeled with a site code to preserve anonymity. The research proposal expressed a desire to work to identify samples that could be replicative. However, challenges with recruitment limited the ability to find sites that were closely aligned beyond affiliation with the state-level denominational entity. The recruitment efforts also failed

to draw participants from churches in an urban context. Table 4 provides an overview of the characteristics of the four research sites.

Yin (2018) stated that it is essential to discuss how individual cases were sufficiently comparable and identify how marked differences would not plausibly undermine any findings in cross-case analysis (p. 198). This research focused on the learning preferences of the shepherd–teacher primarily responsible for delivering the sermon during corporate worship. There is more homogeneity among the pastors. All the shepherd–teachers participating in the research held graduate-level degrees from divinity schools affiliated with the Southern Baptist Convention. They each had more than a decade of ministry experience. The academic institutions and their church settings aligned with the same denominational entity. The similarities in experience, ministry setting, education, and theological commitments represent significant parity that supports the reliability of findings born of cross-case analysis.

Table 4

Characteristics of the Four Research Sites (Identified by Assigned Site Codes)

Site code	Average attendance	Geography	Pastor	
			Tenure in years	Education
LHBG	75–125	Suburb	15–20	Master's degree
HBSS	100–150	Rural	15–20	Doctoral degree
RLJT	100–150	Rural	5–10	Doctoral degree
NSDK	45–75	Suburb	5–10	Master's degree

Participants in the focus groups at each site self-selected via an invitation to all participants in the preaching moment. The groups broadly represented the hearers at the research sites, with a generationally diverse representation of men and women. Participants in the focus groups were predominantly consistent church attendees (e.g., no participants were just visiting

that day). Every participant at each research site self-identified as having committed to and believing in Jesus as presented in Christian orthodoxy. All the participants completed the required consent forms as approved by the IRB.

Data Analysis and Findings

The researcher approached the analytical process with a general analytic strategy characterized by Yin (2018) as relying on theoretical propositions (p. 168). In this case, the theoretical propositions are derived from Knowles's characterization of andragogy and its application in SDL. The researcher augmented the consideration of theoretical propositions by seeking to explore rival explanations (Yin, 2018, p. 172). The researcher has attempted to highlight instances in which the observed phenomenon was plausibly the result of some other influence or intervention rather than an illustration of the concepts associated with SDL. This was often a direct rival represented by formal homiletical training undertaken previously by the shepherd–teachers.

The researcher built on the observations of the general analytical strategy to conduct document analysis and apply a specific strategy, a case-based approach to cross-case synthesis. This approach retains the integrity of the cases rather than aggregating the data to identify variables. The case-based approach considers patterns within each case for comparison across the cases (Yin, 2018, p. 195-196). This analytical approach was constructive since it allowed the researcher to maintain a holistic approach that embraced the real-world context for gathering findings relevant to answering the research questions.

RQ1

RQ1. What awareness do shepherd–teachers have of their process of learning and learning preferences?

The shepherd–teachers were interviewed to discover their awareness of their learning process and preferences. None of the participants had participated in academic coursework or training related to adult learning and the associated theories. The researcher focused on the shepherd–teachers' process of researching biblical content to develop a sermon. Each participant could thoroughly describe a consistent process of carrying out research during sermon preparation. However, the process seemed more intuitive or organic to each shepherd–teacher than deliberately adhering to a preplanned strategy. However, there were consistent elements in the learning process across all the cases. All shepherd–teachers began by considering the biblical text that was the subject of the preaching moment. They all conducted some form of grammatical or language study. Each indicated they noted areas for additional research and leveraged extrabiblical resources to answer questions. In three cases, the shepherd–teachers acknowledged the value of peer collaboration (e.g., listening to other shepherd–teachers or discussing preparation with fellow church leaders) as part of their learning. A likely explanation for the consistency in the learning process across cases is the shared experience of seminary training related to biblical hermeneutics and exegesis.

The audio of the interviews was recorded and transcribed to text. The researcher used the transcripts to identify themes related to the SDL process. The researcher relied on Knowles (1975) to establish the list of behaviors. The list consisted of nine actions in total:

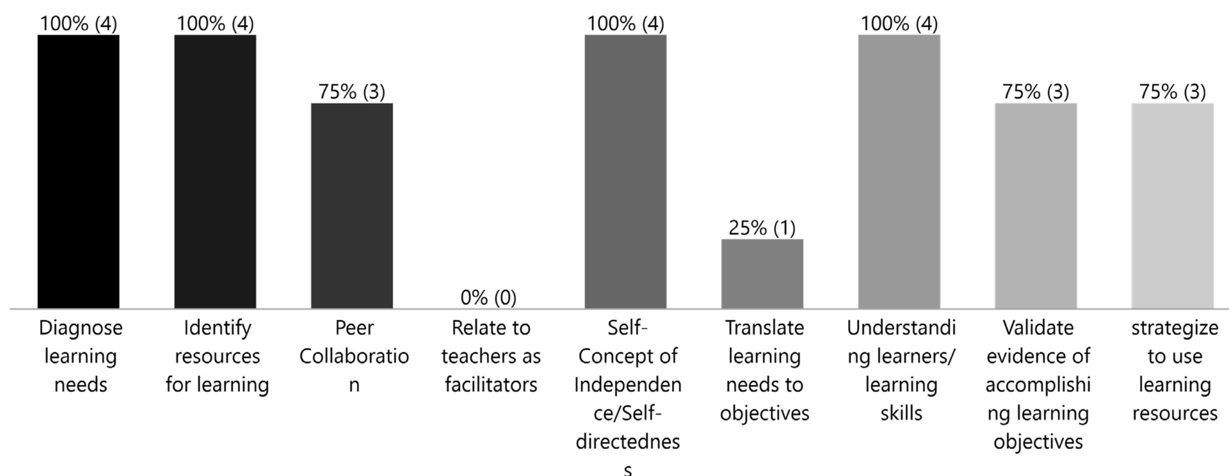
- self-concept of independence/self-directedness,
- diagnosis of learning needs,
- translation of learning needs into objectives,
- identification of resources for learning,
- strategy to use learning resources,
- peer collaboration,

- understanding of learners/learning skills,
- relation to teachers as facilitators, and
- validation of evidence of accomplishing learning objectives.

The researcher manually coded the documents within a software tool, MAXQDA (Version 2022), to aid analysis. The ensuing cross-case analysis demonstrated consistency across the cases regarding application of principles of SDL as described by Knowles (1975). The practice of SDL behaviors was unsurprising, given all the participants had scored within the top quartile of the SDLRS administered before the interviews. However, of the nine practices isolated for coding, four appeared in every case: self-concept of independence, identification of resources for learning, diagnosis of learning needs, and understanding of learners and learning skills. Figure 1 summarizes the analysis regarding practices.

Figure 1

Practices of Self-Directed Learning Across the Cases



Two concepts within the coding of self-directedness—ability to identify resources for learning and strategy to use learning resources—are especially relevant to answering RQ1. The shepherd–teachers were acutely aware of the self-concept of independence. In the interviews, the

sense of self-directedness in learning manifested as an acute awareness of a responsibility associated with the role of the shepherd–teacher. They recognized an individual capacity to conduct research and study to select specific preaching themes, develop preaching content, and answer learning needs in the congregation. The consensus among the cases was that self-directedness, and a capacity to be self-directed in learning, is necessary for a shepherd–teacher. One shepherd–teacher commented, “I’ve said to people before, you can’t really be in ministry, pastoral ministry without being a self-motivator.” The shepherd–teachers consistently noted enjoyment of research and learning related to biblical content. The ability to engage in SDL was presented as an innate capacity, with interviewees reporting “I am a self-learner. I like following some rabbit trails,” and “For me, I love to study.” The shepherd–teachers were acutely aware of their capacities and the necessity of SDL, even without being intentionally aware of their learning preferences and processes.

Interviews with the shepherd–teachers revealed an ability to identify resources for learning. The shepherd–teachers indicated that their research for sermon preparation began with reading a selection of biblical texts. Generally, the shepherd–teachers read the passage in different English translations within a broader literary context, such as an entire chapter or several chapters. The shepherd–teachers noted consideration of the biblical content’s historical, grammatical, and theological implications. Questions emanating from reading and reflecting on the biblical text induced additional research. “Commentaries” was the most frequent germane word appearing in interview segments coded for identification of resources for learning. All cases mentioned the use of commentaries as part of their research. The researcher observed that in every case the shepherd–teacher’s office or workspace included multiple shelves of books relating to biblical topics and themes. The use of electronic resources was mentioned at several

points during the interviews, with shepherd–teachers sharing "I use a lot of software stuff now," and "I try to get commentaries, Logos [the biblical research application]." Although the shepherd–teachers were not intentionally implementing an identified strategy for SDL, all demonstrated an ability to identify and use learning resources to answer questions developed during their sermon preparation.

The interviewees demonstrated an intuitive application of SDL in their ministry and in daily life. The researcher used an open-ended question during the interview to understand how the shepherd–teachers' awareness of their learning process and preferences operated beyond their vocational setting. The shepherd–teachers cited learning activities that almost always involved completing a practical task (e.g., repairing a car or lawnmower or a building project). Interviewees were adept at identifying a learning need, seeking learning resources, applying the knowledge to fill it, and then evaluating whether their learning was sufficient. Each participant was asked to describe their most recent learning experience in their interview. This helps show the capacity for SDL is not constrained to the tasks of sermon preparation or ministry contexts.

All the shepherd–teachers scored in the top quartile of the SDLRS. However, they had not pursued training or instruction immediately related to SDL. In concert, the shepherd–teachers demonstrated a seemingly innate application of behaviors related to SDL. This challenges the suggestion that a high score on the SDLRS only "represents a positive attitude toward learning in general and not specifically toward the kind of learning called self-directed" (Bonham, 1991, p. 92). In each case, researching and developing sermon content were similar. These similarities are more likely than not associated with formal seminary training in biblical hermeneutics and exegesis. However, it is more interesting that the same behaviors associated with SDL manifest in the shepherd–teachers' learning events outside the ministry context. The researcher cannot

conclude whether the aptitude for SDL is an intrinsic skill set for those called to pastoral ministry or a skill developed and honed during the practice of ministry. Regardless of its origin, SDL appeared to be an instinctive or intuitive part of the shepherd–teachers' learning processes.

RQ2

RQ2. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform their instructional and planning activities?

The shepherd–teachers' attributes as self-directed learners are demonstrated in their assessment of the congregations' learning needs and selection of the theme of the preaching moment. The interviews with the shepherd–teachers provided findings with which to explore RQ2. As discussed during the analysis of RQ1, several of the nine practices associated with SDL appeared in all four cases. This included the ability to diagnose learning needs, relying on the factors the SDLRS characterized as a positive orientation to the future and creativity. In each case, the shepherd–teachers acknowledged they were primarily responsible for the topic and content of the preaching moment. Selecting the theme for the preaching moment was itself an exercise in SDL. Although the learning was self-directed, it was not inherently independent. Each shepherd–teacher engaged in peer collaboration and thoughtful consideration of the context, displayed as a consideration of the hearer, or hearer focus, to select the biblical text that would be the focus of their sermon preparation.

The interviews revealed the shepherd–teachers had a keen ability to identify gaps in learning, displayed in their ability to evaluate the learning needs of the congregation. The shepherd–teachers' planning of teaching content consistently involved a willingness to discern and address a perceived learning need of the congregation. The term that was selected for the research was "sagacity." An acute application of discernment leads the shepherd–teacher to provide teaching relevant to the moment. There is a clear need for the capacity to diagnose

learning needs, translate needs into objectives, identify learning resources, and strategize use of those resources. The shepherd–teacher applies the skills associated with SDL to accomplish a significant part of the preaching moment, sermon planning. The shepherd–teachers' planning of teaching content consistently involves a willingness to discern and address perceived learning needs of their congregations.

This characteristic is closely related to the SDLRS factors for positive orientation to the future and ability to use problem-solving skills. In every case, the shepherd–teacher was principally responsible for developing the preaching theme or topic. None of the cases relied on a liturgical calendar or curriculum. Instead, their evaluation of the congregation drove theme and topic selection. For example, one shepherd–teacher explained, "What I try to do to plan out sermons, some that's just I feel like direction of what we're the church is what the Lord's kind of laying on me." In another case, the shepherd–teacher shared, "I generally begin by selecting a book [section of the Bible] that has a message or focus that is something that's close to a need that's in the church." The interviews were coded to explore the shepherd–teacher's capacity to discern the congregation's learning needs. The researcher chose "sagacity" as the code. This code identifies sermon planning that is almost nonplanning—that is, the topic, theme, or biblical text of the preaching moment is driven by the shepherd–teachers' intuition, discernment, or distinct sense of supernatural leading. The meaning of the term "sagacity" relates to the application of "keen and farsighted penetration and judgment: discerning" or a quality "caused by or indicating acute discernment" (Merriam-Webster, n.d.).

One of the eight factors the SDLRS considers is initiative and independence in learning. Guglielmino (1978) offered that this involves "confidence in the ability to work well on one's own" (p. 63). The interviews with the shepherd–teachers revealed a definite sense of

responsibility for their learning and preparation of the content of the preaching moment. The interviews were coded for the self-concept of independence/self-directedness. In all four cases, the shepherd–teachers noted a sense of independence and self-directedness in learning. The feeling of individual responsibility for the preaching moment was expressly presented in three cases. One shepherd–teacher, discussing sermon planning, stated that "I've done all that myself" and that "they [the congregation] just trust me with that." In a separate case, the shepherd–teacher offered, "I typically just do it myself." It was sure the shepherd–teachers possessed a strong sense of independence in learning and planning their learning activities. However, the learning and sermon planning were not inherently independent.

The interviews were also coded for peer collaboration, which is consistent with Knowles's (1975) association of that behavior with SDL. The interviews revealed that in multiple cases the shepherd–teachers pursued the input of other leaders within their congregations in sermon planning. In one case, sermon planning intentionally involved the leadership team, with the shepherd–teacher sharing, "My fellow elder and I, in through the year, we decide what book [biblical book] next we're going to do." In other cases, the willingness to engage other leaders for sermon planning was more informal, represented by comments in the interviews such as this: "There are times when I may bounce ideas off our elders or maybe off some of the pastoral staff." In a separate case, the shepherd–teacher explained how he sought input beyond the leadership team by including the larger church in forming a preaching calendar, noting he would "communicate with the rest of the church so I can kind of plan that out." There was tension when considering the shepherd–teachers' attribution as self-directed learners along with the factor of initiative and independence. However, Knowles (1975) noted peer collaboration as a behavior associated with SDL. Still, this tension highlights an opportunity for

further study of SDL through a more contemporary model of SDL, such as the person process context model, whereby Brockett (2023) argued that “the context in which SDL takes place is a substantial consideration in determining the likelihood for success in learning” (p. 183).

The most excellent demonstration of SDL in the shepherd–teachers’ instructional and planning activities was not in the exegesis of biblical texts but in understanding their congregations’ learning needs. Shepherd–teachers demonstrated a seemingly innate ability to select content for the preaching moment. “Sagacity” intersected with other codes identified in the interviews: “hearer focus” and “diagnosing learning needs.” The capacity to diagnose learning needs is included in Knowles’s (1975) list of behaviors associated with the SDL process (pp. 23–24). “Hearer focus” represents the shepherd–teacher evaluating the specific or spiritual situation of a hearer during preparation of sermon content. Although the shepherd–teachers recognized selection of topics and development of preaching content as an individual responsibility, subsequent learning included peer collaboration, another element of the SDL process.

RQ3

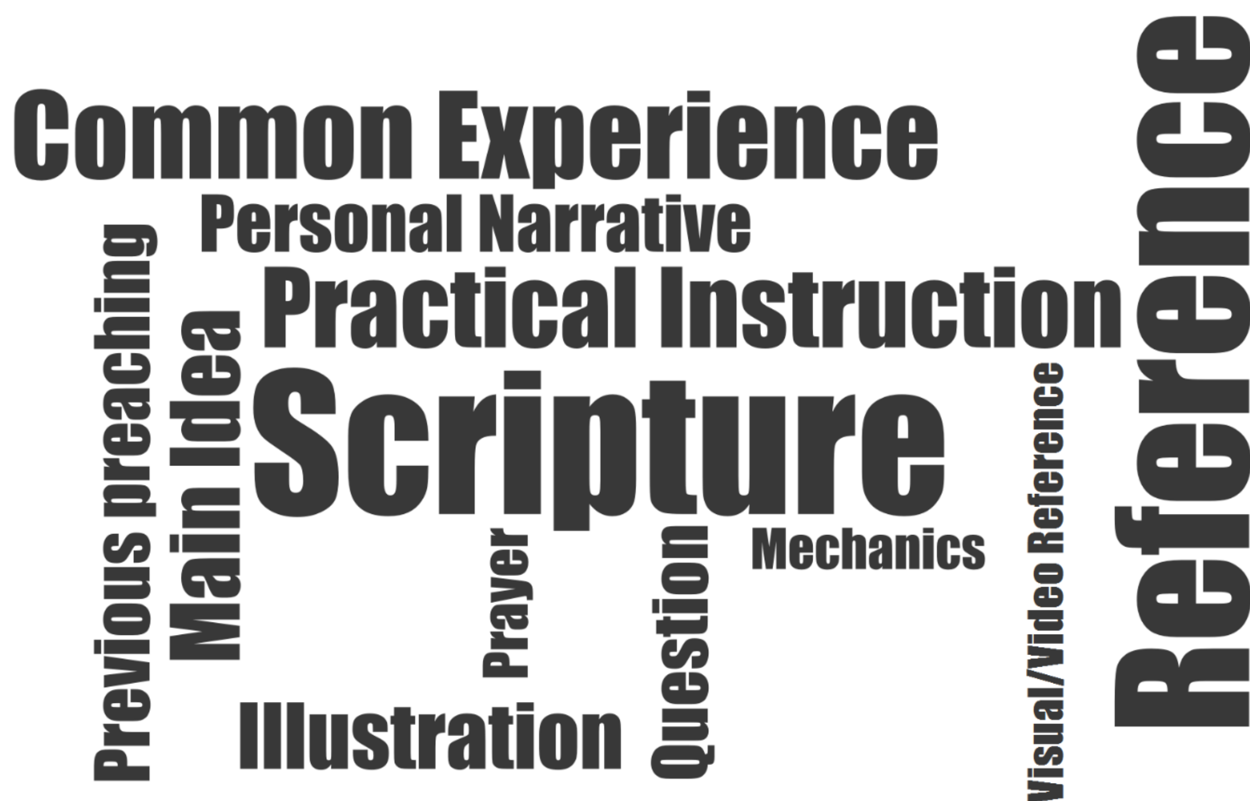
RQ3. How do the shepherd–teacher’s most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform the content and delivery of the preaching moment?

The researcher collected samples of the preaching moment from each case to allow consideration of the presentation of the preaching moment as the outcome of the shepherd–teacher’s learning experience. Two samples were collected from each case. They were subsequently transcribed and coded for themes related to SDL. Additional findings were gathered via field observation by the researcher using a field observation instrument developed during the research planning process. The observation instrument was also coded to identify themes associated with SDL and Knowles’s concept of andragogy. The researcher used a visual presentation tool in the MAXQDA (Version 2022) software to visualize the frequencies of coded

content (Figure 2). The graphical tool allowed quick comparison to identify commonalities across the cases within the transcribed samples of the preaching moment. The ensuing analysis demonstrated that the shepherd–teachers routinely referenced additional learning resources in the preaching moment. Additionally, the shepherd–teacher emphasizes a main idea throughout the sermon that addresses a perceived learning need of the congregation. Additionally, the shepherd–teacher connects the teaching to learning needs through illustrations associated with shared experiences.

Figure 2

Frequencies of Coded Content in Sermon Samples



Each shepherd–teacher pointed the hearers to biblical and extrabiblical learning resources throughout the preaching moment. The researcher coded instances in the sermon samples as

"reference" when the shepherd–teacher provided a citation (e.g., name or title) of an additional learning resource with which to further explore the topic at hand in the preaching moment. The researcher then used the MAXQDA (Version 2022) software to consider the row percentages for the code, where a row percentage indicates the percentage of the documents that have been coded with a given code. References represented 5%–12% of the content in the transcribed sermon samples. This is striking because it represented a more significant portion of the sermon content than the main idea. It was only rivaled by content coded "scripture." The "scripture" code marked moments when the shepherd–teacher was reading directly from the Bible aloud for the congregation. Reviewing sections coded "reference" revealed most citations were to other areas of the Bible where the topic or idea could be further explored. However, references also included biblical commentaries, teachings from other spiritual leaders, books, and websites.

Knowles et al. (2015) shared that adult educators "make efforts to create learning experiences in which adults are helped to make the transition from dependent to self-directed learners" (p. 44). The shepherd–teachers' pattern of providing references for continued learning beyond the preaching moment may reflect an effort to assist the hearers in independent and continuing learning related to the sermon content. However, providing references may equally be ascribed to building credibility with the hearers. Still, providing references to additional learning resources models the shepherd–teachers' capacity to identify resources for learning. This behavior is associated with SDL, as Knowles (1975) described. The shepherd–teacher is modeling the capacity and behaviors related to SDL regardless of any intent to encourage additional study by the hearers.

The sermon samples for every case focused on central ideas associated with the congregation's learning needs. This quality is tightly aligned with the shepherd–teacher's

capacity to diagnose learning needs. Additionally, it demonstrates the intent to formulate a clear learning objective. In most samples, the main idea resulted in practical instruction. The researcher coded sermon content “main idea” when content directly addressed a purposeful main idea or principal concept the shepherd–teacher intended to convey to the hearers. The researcher again used MAXQDA (Version 2022) to evaluate the row percentages. Content coded “main idea” represented between 3%–6% of the content of sermon samples. The emphasis on a central idea in the preaching moment is consistent with homiletical training. Shepherd–teachers are encouraged to develop the main idea of their message. Still, the capacity to identify a biblical text, research the text, and communicate a central idea connected to the hearers’ current context almost certainly requires development of clear learning objectives in response to discerned learning needs.

The sermon samples emphasized illustrations that connect with common experiences and the learning needs of the congregation. The researcher coded the sermon samples with “common experience” when the shepherd–teacher related the sermon material to the familiar experiences of the hearers, often to highlight the relevance of the sermon content or encourage its practical application. The decision to code for common experience is consistent with the theoretical framework of the study. Knowles (1970) identified that the adult learner entered the learning transaction with a “deep investment in its [the experience’s] value” (p. 44). Learners’ past experiences created opportunities to assimilate new knowledge. There were 52 segments within the sermon samples coded “common experience.” These segments were generally illustrations. The illustrations regularly included personal narratives in which the shepherd–teacher used their experience or personal situation to emphasize a point of learning. Sharing personal narratives demonstrates transparency and vulnerability indicative of self-confidence and emotional security,

two attributes associated with SDL in Guglielmino's (1978) research and the development of the SDLRS. Additionally, the ability of the shepherd–teacher to build rapport with hearers is consistent with an understanding of learners, as Knowles (1975) expressed.

The field observation notes also demonstrated that the shepherd–teacher used illustrations or stories that connected the sermon message to events and activities familiar to the congregation. This included addressing philosophical views of contemporary culture (e.g., secular humanism, consumerism, and individualism), the COVID-19 pandemic, and a recent church-building campaign. This observation is consistent with the suggestion that "the first task of the facilitator of learning is to help the learners become aware of the 'need to Know'" (Knowles et al., 2015, p. 64). The connection of the sermon content to contemporary events or common experiences may indicate the shepherd–teachers recognize the value of connecting learning to immediate situations to positively influence hearers' motivation to engage in the learning activity (i.e., the preaching moment).

RQ4

RQ4. How does the perception of the shepherd–teacher's attributes of SDL inform a hearer's perception and view of the content and delivery of a sermon?

The researcher leveraged the benefit of focus groups to produce findings with which to explore the hearers' perceptions of the preaching moment. Each focus group was guided by a core set of questions and conducted in a semistructured format. The ensuing analysis focused on "specific exchanges, nuance, and the topics explored" during the conversations in the focus group (Cyr, 2019, p. 100). The researcher considered frequency and internal consistency to develop themes. One important nonverbal element to note is the intensity of expression (Cyr, 2019, p. 94). In every focus group, the participants were thoroughly engaged and seemed eager to share their experiences and perceptions of the preaching moment. The attitudes were

overwhelmingly positive toward the shepherd–teacher. The ability of the congregation to witness the routine life of the shepherd–teacher via a personal relationship as a peer was a repeated theme that marked the congregations' confidence in the preaching content and desire for continued biblical study. Additionally, the fruit of the shepherd–teachers' study efforts in presenting historical and grammatical context and concepts surrounding biblical texts influenced the hearers' desire to continue studying the content of the preaching moment and the Bible.

There is a discernible connection between the demonstrated learning in the sermon content, the perception of relatability, and hearers' confidence in the teaching of the shepherd–teacher. The researcher coded the focus group transcripts with the code "credibility." This code marked dialogue that spoke to the source of the hearers' confidence in the reliability of the content of the preaching moment. This theme emerged in each focus group as the researcher asked the group to characterize or describe the pastor's preaching or teaching. Initial responses included assertions like "[The shepherd–teacher] is faithful," or "He preaches the truth," as well as statements that the pastor was "truthful, honest" and "committed to the Bible." The researcher further explored the initial responses by asking participants to elaborate on the reasons for their assertions. Two distinct themes emerged in the responses across all four cases—a perception of relatability and thoroughness in the exposition of the biblical passage.

The focus groups' appreciation for "well-prepared" and "thorough" preaching content was consistent with the researcher's expectation because of the shepherd–teachers' capacities as self-directed learners to study a biblical passage and topic. The consistent emphasis on relatability and the observed life of the shepherd–teacher was a more interesting observation. The researcher leveraged the code relations browser within MAXQDA (Version 2022) to visualize instances in which codes co-occur within the focus group transcripts. The researcher looked for

the intersection of codes in document segments containing both codes and overlap. The code for "credibility" repeatedly intersected with "relatable." The code "relatable" was applied when the content of the preaching moment or the conduct of the shepherd–teacher created a connection with the hearer." The researcher could discern the participants' palpable admiration for, respect for, and connection with the shepherd–teacher in the focus groups. Their tone was affectionate. They seemed eager to celebrate him. The relationship with the shepherd–teacher influenced their perception of the teaching moment. When explaining how they knew the shepherd–teacher was a person of "integrity," they shared stories about personal interactions, conversations, and observations. Responses indicated a clear opportunity to witness the lived-out application of content shared in the preaching moment, with participants saying that "he lives a lifestyle that way" and that "he doesn't present himself more than what he is; he presents himself as a sinner for whom Christ has been given for salvation, and that he is a servant in the church and he lives that." The participants' confidence in the shepherd–teacher's lived-out experience implies a relationship beyond the conduct or time of the preaching moment.

An explanation for the emphasis on the relationship between the shepherd–teacher and congregants may consider Knowles's view that a "learner needed to regard teachers and peers as helpers with resources to share" (Henry, 2011, p. 111). Henry (2011) emphasized Knowles's expectation that SDL usually unfolded in the context of collaborative relationships that were consultative and lacking any sense of competition (p. 111). The congregants in the focus groups consistently demonstrated views of the shepherd–teacher as a peer on a shared learning journey, primarily due to the sharing of personal narratives. The sermon samples in all cases showed the use of personal narrative from the shepherd–teacher to connect teaching with the hearers' common experiences and demonstrate the preaching content's relevance.

The thoroughness of the biblical exposition, as a demonstration of the shepherd–teachers' preparation and research, was a theme in the focus groups. The focus groups indicated they were encouraged to continue the study of the preaching content when presented with historical–grammatical context and concepts that challenged their preconceptions. The researcher coded the content of the focus group transcripts as "facilitative" when the group indicated that sermon content was helpful, particularly if it was providing a greater understanding of biblical concepts and encouraging continuing engagement with the topic. The code appeared in the focus group findings for all cases. It represented 4%–11% of coded content in the individual cases and 6% of overall coded content. The code was associated with responses to a question asking participants to identify sermon content that encouraged continued study on the sermon topic. Reactions across the cases consistently emphasized that historical–grammatical context encouraged continued study. Example responses from different cases include "There was sufficient background information, historical things," "a good job of giving us context for what's going on culturally at the time that it is written and how it relates to other parts of the Bible," and "The majority of his time is spent on scripture tying the point from one scripture to the other." Additionally, the participants noted the value of an "expository" approach, meaning the shepherd–teacher taught through substantive sections of the biblical text (e.g., entire books). The researcher queried the word "expository" within the focus group transcripts using the word explorer tool in the MAXQDA (Version 2022) software. The results showed that the term appeared in three transcripts and intersected with text coded as "facilitative" and "credibility." The emphasis on the expository model of preaching is potentially an effect of the doctrinal beliefs associated with the sample. However, that would not diminish the focus group

participants' perceptions that this approach encouraged and enabled continued study of the content shared in the preaching moment.

Another theme that was present and associated with continued study of the topic related to when the shepherd–teacher "stepped on toes," a euphemism for presenting uncomfortable teaching that challenges personal paradigms or preconceptions. This exact phrase emerged in content coded as "facilitative" in three cases. A participant stated, "That's great to step on our toes," with positive intonation affirmed by other focus group members shaking their heads up and down and smiling. In another instance, a participant explained, "Sometimes what engages you and causes you to want to dig in a little bit more is because he steps on your toes." In a separate case, the language was initially less direct, lauding the shepherd–teacher because "he doesn't shy away from those verses because they're difficult to hear" and later clarifying that "there are some subjects that would step on people's toes." This language implies a common reluctance to address complex topics during the preaching moment. The participants seemed to highlight the boldness or confidence of the shepherd–teacher in addressing challenging issues. Across the cases, a connection was expressed between the shepherd–teachers' management of content that challenges individual preconceptions or paradigms and the hearers' desire to engage in continued learning on the topic. There is an inherent confidence required to "step on toes." Guglielmino (1978) noted self-confidence as an attribute desirable or necessary for SDL and included it as a factor described as "self-concept as an effective learner" (p. 74). It is conceivable that the shepherd–teachers' self-concept as effective learners while studying biblical texts bolsters their ability to address complex topics.

The shepherd–teacher's capacity as a self-directed learner informs their ability to engage in a peer-like relationship with hearers while providing consultative guidance during a shared

learning experience. The relational aspect of the learning experience exceeded the preaching moment to include interpersonal interactions and a perceived living out of the preached content by the shepherd–teacher. The focus groups consistently advocated for an" expository" approach to the preaching moment, including sharing of the historical–grammatical context for the biblical passage that was the focus of the preaching moment. The perception of the shepherd–teacher as a peer on a shared learning journey was bolstered through sharing of personal narratives and acknowledgment of his spiritual challenges. Additionally, the hearers were encouraged to engage in the ongoing study of the topic of the preaching moment when the shepherd–teacher confidently presented sermon content that challenged personal or cultural paradigms in a way uncomfortable for the hearer. The learning attributes of the shepherd–teachers have some relationship with the hearers' perceptions of the preaching moment. Without a doubt, the area is ripe for additional research with more refined variables to seek better explanation of the exact nature of the influence of those attributes on the hearer's experience in the preaching moment.

Evaluation of the Research Design

In addition to collecting information to answer the research questions, the data collection process provided an opportunity to reflect on the research design. The researcher took note of issues or concerns as they emerged. This section presents those issues to improve future research that pursues a similar approach.

Recruitment

The researcher encountered significant challenges recruiting research sites. This impediment interfered with executing the initial research plan to implement a replicative sampling model. Instead, the researcher was constrained to move forward in the research process with the available research sites, having obtained enough cases to conduct a multiple-case study.

Future research will likely encounter equal challenges recruiting participants given the competing demands on the time of a shepherd–teacher and the indirect benefit of participating in research.

Operationalizing SDL

The researcher encountered challenges operationalizing the concept of SDL. Literature, in an effort to provide a clear definition, has developed varied approaches based on processes, lists of characteristics or qualities, and, most recently, learning models. This research relied on the measurement scales developed by Guglielmino (1978) and behaviors described by Knowles (1975). The difficulty of moving between the consideration of SDL as a process and as individual characteristics was discounted when planning the research. It may have been more helpful to approach the research from the broader perspective of SDL as a learning model, such as the PRO model suggested by Brockett and Hiemstra (1991). Brockett and Hiemstra (2012) explained that “one important aspect residing at the PRO model’s core is the distinction between self-direction as a personal learner characteristic and as instructional transaction characteristics” (p. 156). Using a model might have encouraged a more structured approach to exploration of SDL in the preaching moment. However, the study was preeminently focused on the personal characteristics of the shepherd–teacher and secondarily on the learning transaction in the context of the local church. Attempting to consider the whole model would create a qualitative research project beyond the scope and purpose of this study. In all, this evaluation of the research design makes it plain there remains a clear opportunity for continued study of SDL in the context of the preaching moment in the local church.

Assessing the Learning Environment

It would have been helpful to explore whether the congregation considered the learning environment psychologically and physically comfortable. The researcher did not include questions related to the learning environment. Instead, assessments of the learning environment were based on the observations made during the site visits. The result is that characterization of factors associated with the comfort of the learning environment is constrained by the researcher's bias. Incorporating questions regarding the physical environment, whether via the focus group or a survey, would have allowed the researcher to gather a vital variable connected with andragogy. However, the study was primarily focused on the attributes of the shepherd–teacher rather than broadly addressing the topic of SDL in the Church.

Chapter Summary

The researcher executed an exploratory multiple-case study that leveraged multiple data collection methods to answer stated research questions. Data collection included the protocol described in Chapter 3. The collection included sermon samples, pastoral interviews, field observation notes, and focus groups and resulted in a document system containing 27 documents with 873 coded segments. The researcher approached the data with a general analytical strategy focused on exploring theoretical propositions associated with Knowles's concepts of andragogy and SDL. MAXQDA (Version 2022) software assisted the researcher with organizing, coding, and conducting visual data analysis. The software was most helpful for sustaining a systematic approach to handling each data set. This was especially important when performing the document and content analysis that underpinned additional layers of cross-case analysis and development of rival explanations. The volume of data and analytical methods were adequate to address the research questions. However, the study design was challenged with respect to

recruitment, operationalization of key concepts, and full exploration of the impact of the physical aspects of the learning environment. Still, the research was fruitful, with theoretical and practical implications captured and explained in the following chapter.

CHAPTER FIVE: CONCLUSIONS

Overview

Teaching and equipping have been the principal means of leadership in the local New Testament church. The biblical passage routinely characterized as the Great Commission hinges on the imperative to "make disciples" (*ESV*, 2001/2016, Matt. 28:19). To be a disciple is to be a student emulating the life of the teacher (Helm, 1988, p. 629). From its origin, the Church has been gifted with persons called to exercise leadership in local churches through the gift of teaching (Eph. 4:11, 1 Tim. 3:2). These gifted servants continue to routinely carry out the call to teach in the preaching moment or sermon, which is featured in countless churches around the globe as a primary means of spiritual formation and maturation of the Church.

Beyond the Church, the emphasis on teaching as a means of leadership has proliferated. The study began by acknowledging that "out is the management emphasis of strategic planning and in is a new emphasis on learning, development, and mutuality" (Bredfeldt, 2006, p. 14). This trend has instigated a volume of scholarly work exploring and explaining how people learn. This breadth of scholarship allowed the Church to benefit from deep thinking on learning to hone its capacity to carry out the principal purpose of making disciples. This study aimed to contribute to that effort. The research engaged current concepts from the field of learning theory to explore the attributes and actions of the gifted servants, the shepherd–teachers, who, week in and week out, are consistently providing learning experiences to the Church through the preaching moment and the hearers' perceptions of the preaching moment.

The research instigated intentional engagement with four shepherd–teachers in their ministry context, before and during the preaching moment, and with the hearers. This privileged opportunity resulted in discoveries that informed reflection on the theoretical underpinnings of

the study. More importantly, from the researcher's perspective, the study engendered practical applications regarding how the Church prepares gifted teachers and engages in the preaching moment. However, some limitations indicated opportunities for continued and better research.

Research Purpose

The purpose of this qualitative multiple-case study was to explore the influence of the shepherd–teacher's learning attributes, informed by adult learning theory, on the preparation, presentation, and perception of the preaching moment within a conservative Southern Baptist congregation. Knowles (1970;1975) offered the theory guiding this study in his andragogy and self-directed learning (SDL) concepts. Knowles (1975) introduced an educational model that emphasizes adult learning and primarily SDL. The study attempted to observe whether being a self-directed learner impacts the shepherd–teacher's instructional activities, including preparation and delivery.

Research Questions

RQ1. What awareness do shepherd–teachers have of their process of learning and learning preferences?

RQ2. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform their instructional and planning activities?

RQ3. How do the shepherd–teacher's most prominent attributes as a self-directed learner, as assessed by the SDLRS, inform the content and delivery of the preaching moment?

RQ4. How does the perception of the shepherd–teacher's attributes of SDL inform a hearer's perception and view of the content and delivery of a sermon?

Research Conclusions, Implications, and Applications

The research was guided to pursue findings to answer the aforementioned research questions. The questions focused on the shepherd–teacher as the person primarily responsible for weekly teaching during the sermon or preaching moment. The researcher noted the seemingly intuitive application during sermon preparation and presentation of principles and practices

espoused in theoretical literature following Knowles's andragogy theory. However, the hearers' perceptions of the preaching moment gave insight into the features of sermon content that engender credibility and spur continued personal study. The conclusions regarding the research questions served as a platform from which the researcher developed theoretical and practical implications.

RQ1 Conclusion

The shepherd–teachers were interviewed to discover their awareness of their learning process and preferences. Each participant could thoroughly describe a consistent process of carrying out research during sermon preparation. However, the process seemed more intuitive or organic to each shepherd–teacher rather than reflecting deliberate adherence to a preplanned strategy. There were consistent elements in the learning process across all the cases, likely explained by the shared experience of seminary training related to biblical hermeneutics and exegesis. No participants had participated in academic coursework or training related to adult learning and associated theories. However, all four participants scored in the top quartile of the SDLRS. The interviewees demonstrated an intuitive application of SDL in their ministry and in daily life. Of the nine practices associated with SDL by Knowles, four appeared in every case: self-concept of independence, identification of resources for learning, diagnosis of learning needs, and understanding of learners and learning skills.

RQ1 Theoretical Implication

The researcher approached the analytical process with a general analytic strategy characterized by Yin (2018) as relying on theoretical propositions (p. 168). In this case, the theoretical propositions derived from Knowles's characterization of andragogy and its application in SDL. In answering RQ1, the researcher's experience instigated further thought

regarding SDL, mainly as evaluated by Guglielmino's (1978) factors in the Self-Directed Learning Readiness Scale (SDLRS). The study provides anecdotal support for the SDLRS and challenges the contention that the instrument only measures a broad love for learning rather than a specific capacity for SDL.

All the shepherd–teachers scored in the top quartile of the SDLRS. However, they had yet to pursue training or instruction related to SDL. In concert, the shepherd–teachers demonstrated seemingly innate application of behaviors related to SDL. They modeled a specific ability to recognize particular learning needs, identify specific resources to address them, and iteratively apply learning skills to achieve a desired and measurable learning outcome. The exercise of such specific behaviors among the group challenges the suggestion that a high score on the SDLRS only "represents a positive attitude toward learning in general and not specifically toward the kind of learning called self-directed" (Bonham, 1991, p. 92). This study was qualitative and did not have as an aim the replication of reliability studies for the SDLRS. Still, the practice of behaviors associated specifically with SDL in professional and private life in participants scoring in the top quartile of the SDLRS provides anecdotal support for the utility of the SDLRS in considering individual factors related to SDL.

RQ1 Practical Application

Two practical applications emerged in answering RQ1. Both address the preparation and equipment of shepherd–teachers. All shepherd–teachers participating in the study were trained at seminaries affiliated with the Southern Baptist Convention. This was most likely demonstrated in their capacity to study biblical texts. More likely than not, their training enhanced their skills to engage in SDL. However, an individual discerning a call to embark on vocational ministry as a

shepherd–teacher would benefit from considering their learning skills and preferences. Additionally, it would be worthwhile to consider SDL's role within the seminary curriculum.

An individual discerning a call to vocational ministry as a shepherd–teacher would benefit by evaluating their capacity for SDL. The shepherd–teachers in the research project were acutely aware of the self-concept of independence. In the interviews, the sense of self-directedness in learning manifested as an acute awareness of a responsibility associated with the role of the shepherd–teacher. They recognized an individual capacity to conduct research and study to select specific preaching themes, develop preaching content, and answer learning needs in the congregation. As discerned by the SDLRS, the attributes associated with SDL correspond with the attributes necessary to carry out the biblical imperative to "feed my sheep" (*ESV*, 2001/2016, John 21:17). Using an instrument like the SDLRS to assess one's learning skills would at least be a tool for understanding opportunities for development or, perhaps, an affirmation of a gift needed to fulfill a ministerial calling.

It would be worthwhile for seminaries to explore SDL across their curricula and overall teaching philosophies. Creating opportunities via an introductory learning skills course for aspiring shepherd–teachers to intentionally explore and measure their SDL skills could be a more direct action. The consensus among the cases was that self-directedness and a capacity to be self-directed in learning are necessary for a shepherd–teacher. One shepherd–teacher commented, "I've said to people before, you can't really be in ministry, pastoral ministry without being a self-motivator." The shepherd–teachers consistently noted enjoyment of research and learning related to biblical content. The ability to engage in SDL was presented as an innate capacity, with interviewees reporting "I am a self-learner. I like following some rabbit trails," and "For me, I love to study." The shepherd–teachers were acutely aware of their capacity for, and the necessity

of, SDL, even without being intentionally aware of their learning preferences and processes. Intentional equipment that provides a heightened awareness of learning skills would help aspiring shepherd–teachers hone the necessary qualities before entering the complex interpersonal context of local church ministry.

RQ2 Conclusion

The most excellent demonstration of SDL in the shepherd–teachers' instructional and planning activities was not in exegesis of biblical texts but in understanding the congregation's learning needs. Shepherd–teachers demonstrated a seemingly innate ability to select content for the preaching moment. The interviews revealed that the shepherd–teachers had a keen ability to identify gaps in learning, displayed in their ability to evaluate the learning needs of the congregation. The shepherd–teachers' planning of teaching content consistently involved a willingness to discern and address a perceived learning need of the congregation. The term that was selected for the research was "sagacity." An acute application of discernment leads the shepherd–teacher to provide teaching relevant to the moment. There is a clear need for the capacity to diagnose learning needs, translate needs into objectives, identify learning resources, and strategize the use those resources. The shepherd–teacher applies the skills associated with SDL to accomplish a significant part of the preaching moment: sermon planning.

RQ2 Theoretical Implication

Answering RQ2 highlighted theoretical tension between the concept of independence as an attribute of SDL and the mutuality of the learning environment, also characterized as an element of SDL. SDL is not inherently independent or autonomous learning. One of the eight factors the SDLRS considers is initiative and independence in learning. Guglielmino (1978) offered that this involves "confidence in the ability to work well on one's own" (p. 63). The

interviews with the shepherd–teachers revealed a strong sense of personal responsibility for their learning and preparation of the content of the preaching moment. However, they equally communicated a willingness to seek peer input. Knowles (1975) noted peer collaboration as a behavior associated with SDL. In three cases, the shepherd–teachers acknowledged the value of peer collaboration (e.g., listening to other shepherd–teachers or discussing matters with fellow church leaders) as part of their learning. The temptation to emphasize the self-regulatory elements of SDL creates the opportunity to overemphasize independence in learning relative to initiative and collaboration. Research related to SDL within teams, such as that of Van Woezik et al. (2021), would be valuable to maintain a balanced perspective within the context of medical education. The tension reveals an opportunity for further study of SDL through a more contemporary model of SDL, such as the person process context model, whereby Brockett (2023) argued that "the context in which SDL takes place is a substantial consideration in determining the likelihood for success in learning" (p. 183).

RQ2 Practical Application

The shepherd–teacher must participate in the community as a peer to rightfully discern learning needs. Ayabwile (2013) counseled, "A powerful message in the hands of a humble messenger *among the people* [emphasis added] is how God normally works" (para. 2). He pointed to the apostle Paul's affirmation to the church in Thessalonica: "You know how we lived among you for your sake" (*New International Version*, 1978/2011, 1 Thess. 1:5). The shepherd–teacher, too, should live among the congregation in a consistent peer relationship. The connection is essential for the shepherd–teacher to discern congregational learning needs that guide their sermon planning. The most practical observation from RQ2 was recognition of SDL's role in the shepherd–teacher's capacity to diagnose congregational learning needs. The

researcher expected to observe, and did observe, SDL attributes and behaviors in shepherd–teachers' study of biblical content while preparing sermons. However, the intuitive application of SDL was active even before engagement in sermon planning. The shepherd–teachers relied on their relationship with the congregation to understand learning gaps and diagnose learning needs. Shepherd–teachers engaged in peer collaboration and thoughtful consideration of the context, displayed as a consideration of the hearer, or hearer focus, to select the biblical text and refine the focus of their sermon preparation. The shepherd–teacher is best equipped to guide hearers to address learning gaps in a consistent peer relationship with the congregation. The point is best illustrated by the choice to use "shepherd–teacher" throughout this study. The practical application of andragogical principles in ministry affirms that one must be both a shepherd and a teacher rather than a shepherd or a teacher. Gone is the perception of the shepherd–teacher as the authoritative teacher; instead, there must be a sense that they are a participant in a shared learning experience.

The shepherd–teacher requires the capacity to engage in continuous learning beyond biblical material and spiritual content. Multiple volumes addressing the homiletical preparation and process recognized the necessity of continuous learning for effective pulpit ministry (Lawson, 2022; Stott & Scharf, 2015). The ability to develop thoughtful illustrations and applications relies on the shepherd–teacher's ability to draw from a broader base of knowledge and experience. Challenging contemporary unbiblical themes in culture implies an awareness of those themes. The shepherd–teacher's capacity for SDL goes beyond an ability to follow the exegetical process prescribed in preaching text; instead, they must identify and leverage learning resources to evaluate culture and current events. Practical volumes on preparing for and carrying

out the preaching moment would help shepherd–teachers by going beyond indicating a need for continual learning to also providing direction on refining one's skills as a learner.

RQ3 Conclusion

The sermon samples reflected multiple characteristics consistent with attributes and behaviors associated with SDL. Sermon samples for all the cases focused on a central idea related to the congregation's contemporary learning needs. This quality is tightly aligned with the shepherd–teachers' capacity to diagnose learning needs. Additionally, it demonstrates intent to formulate a clear learning objective. The shepherd–teachers demonstrated a pattern of providing references for continued learning beyond the preaching moment. This may reflect an effort to assist the hearers with independent and continuing learning related to the sermon content. Knowles et al. (2015) shared that adult educators "make efforts to create learning experiences in which adults are helped to make the transition from dependent to self-directed learners" (p. 44). The consistent references model for the congregation is the shepherd–teachers' capacity to identify and use learning resources. Additionally, sermon samples emphasized illustrations that connected with shared experiences and the learning needs of the congregation. Generally, the illustrations included personal narratives that relied on the shepherd–teachers' situation or experience to emphasize a point. Sharing personal narratives demonstrates transparency and vulnerability indicative of self-confidence and emotional security, two attributes associated with SDL in Guglielmino's (1978) research and the development of the SDLRS.

RQ3 Theoretical Implication

In the half-century since Knowles popularized andragogy, like all sincere scholarship, it has been critiqued. The predominant challenge documented by Rachal (2002) was the absence of

an operational definition for Knowles's "andragogy" and, more practically, a criterion with which to identify what procedures constitute andragogical practice. Rachal executed a macrostudy to suggest criteria and conditions for defining and determining andragogical practice. This study narrowed its scope to concentrate on SDL and the shepherd–teacher. However, the context for a significant portion of the study, the preaching moment in the local church, arguably fulfills Rachal's criteria. This suggests that the local New Testament church provides a fitting context for exploring andragogical practice. Additionally, consistency with Rachal's criteria provides confidence that the phenomenon documented in this study is a sincere observation of andragogy in praxis. However, the unique context of mutuality in the churches emphasizes the difficulty in andragogy of balancing the sense of learner autonomy and learning in collective or group environments. Perhaps it is time to challenge the assertion that "learner control is the crux of whether a learning experience is andragogical or not" (Rachal, 2002, p. 218).

The research setting was explicitly an opportunity to consider SDL. The International Society for SDL (2024) defines SDL specifically as "an intentional learning process that is created and evaluated by the learner" (para. 2). This is especially true with a narrow focus on the shepherd–teacher's preparation of sermon content. However, a more careful consideration of Rachal's (2002) criteria for the collaborative determination of learning objectives is necessary to answer whether the preaching moment is an exercise in andragogical practice. Rachal (2002) recognized that "mutuality and collaboration can cause apparent instructor/learner role dichotomies to get fuzzy" (p. 218). This is especially true in the local church where the shepherd–teacher has a clear responsibility to teach while simultaneously being part of the community engaged in learning. This study revealed the shepherd–teacher's sense of individual

responsibility and intentional engagement with the community to discern mutually beneficial learning objectives.

Learner control is an essential aspect of andragogical practice to encourage the development of the learner's concept of being self-directed and independent, counteracting conditioning from pedagogical experiences. Knowles et al. (2015) recognized that

> the minute adults walk into an activity labeled "education," "training," or anything synonymous, they hark back to their conditioning in their previous school experience, put on their dunce hats of dependency, fold their arms, sit back, and say "teach me." (p. 65)

Anecdotally, the researcher has experienced this mindset within the local church during the preaching moment. Without a doubt, there is a need to develop an environment that respectfully and supportively allows and encourages learners to exercise self-directedness in their learning. However, this effort should not constrain the facilitator, the shepherd–teacher in this study, or lead them to abdicate the duty of facilitating the learning for the learner's benefit. Lewis (1992) captured it well when he wrote, "It would be better to describe self-directedness as a goal for adult education and not a natural trait in all adults" (p. 167).

The preceding argument might lead to an assessment that the researcher is advocating for something other than Knowlesian andragogy. That is left to the evaluation of experts in the field more knowledgeable and seasoned than the researcher. However, the researcher aims to consider the value of Knowles's initial assumptions as applied to a unique learning context outside the traditional learning environments. The local church inherently prizes—or at least should prize—mutuality and cooperation and resists a view of the shepherd–teacher as different from and above those participating in the preaching moment. The tension remains with respect to operationalizing andragogy for research, particularly balancing self-directedness and peer collaboration. This study accepted and moved beyond viewing the ambiguity of andragogy as a challenge to empirical research. Instead, the aim became to admire the value of the breadth of

Knowles's assumptions, because it provides flexibility and latitude to pursue an andragogical approach in various practical settings without succumbing to prescriptive practices created for the sake of research conducted in particular and specialized contexts.

RQ3 Practical Application

The andragogical model's emphasis on the learner's responsibility ought to encourage the shepherd–teacher to create learning experiences that promote self-directedness in learning. An essentially pedagogical model within the Church latently emphasizes dependence on the shepherd–teacher for the sharing of biblical truth. This constrains the capacity and impact of the Church. In contrast, intentionally pointing hearers to additional sources of knowledge, building community by highlighting shared experience, and establishing rapport as a peer in a shared learning experience encourages independent learning while emphasizing collaboration.

Addressing common experiences in the preaching moment through illustrations, including events and activities familiar to the hearers, creates an opportunity to engage hearers in the preaching moment and emphasizes community by highlighting shared experiences. The research revealed that the preaching moment consistently addressed common experiences. The field observations also showed that the shepherd–teachers used illustrations or stories to connect the sermon message to events and activities familiar to the congregation. This included addressing philosophical views of contemporary culture (e.g., secular humanism, consumerism, and individualism), the COVID-19 pandemic, and a recent church-building campaign. This observation is consistent with the suggestion that "the first task of the facilitator of learning is to help the learners become aware of the 'need to Know'" (Knowles et al., 2015, p. 64). Additionally, as was highlighted in the application related to RQ2, the common experience

revealed a connection between the congregation—routine participants in the preaching moment—and the shepherd–teacher.

To facilitate continued exploration, make references available to the hearers within the preaching moment. The sermon samples included a pattern of providing references. Often, these references connected disparate portions of Scripture to elaborate on key points in the sermon content. However, extrabiblical resources were often highlighted. At the very least, the shepherd–teacher modeled willingness to engage various learning resources thoughtfully. Additionally, they provided pointers to resources for continued personal study. It may be worthwhile for the shepherd–teacher to share a list of additional references or resources for the hearers to use to continue to explore the sermon content. The researcher reflected on the vestige of once prominent church libraries. Although a library may be unrealistic, the researcher noted that most research sites had a table of print resources accessible to persons participating in the preaching moment. This is a readily available opportunity to intentionally provide specific resources that encourage continued learning among the congregation.

RQ4 Conclusion

The ability of the congregation to witness the routine life of the shepherd–teacher via a personal relationship as a peer was a repeated theme that marked the congregation's confidence in the preaching content and desire for continued biblical study. Additionally, the fruit of the shepherd–teacher's study efforts in presenting historical and grammatical context and concepts surrounding biblical texts influenced the hearers' desire to continue studying the content of the preaching moment and the Bible. There was a discernible connection between the demonstrated learning in the sermon content, the perception of relatability, and the hearers' confidence in the teaching from the shepherd–teacher. Across the cases, a connection was expressed between the

shepherd–teachers' management of content that challenges individual preconceptions or paradigms and the hearers' desire to engage in continued learning on the topic.

RQ4 Theoretical Implication

The researcher's experience during the research demonstrated that the pulpit remained a principal means of Christian education. Kang and Parrett (2009) offered, "Many pastors seem to have all but forsaken the teaching task as a key aspect of their ministry … many pastors have simply abandoned the task of significant teaching altogether" (pp. 157–158). The feedback from the hearers in this study demonstrated that they viewed the preaching moment as a learning experience. The content of the moment encouraged continued study and application of principles drawn from the teaching to their lived experience. At least in these anecdotal cases, the shepherd–teachers certainly had not forsaken significant teaching. The hearers in the focus groups lauded the deliberate teaching of biblical content, including what they perceived as well-researched historical and grammatical context. Volumes addressing Christian education routinely emphasize specific educational ministries of the Church (e.g., Sunday school) but neglect the pulpit. Still, the pulpit has demonstrated its capacity as a primary means of corporate growth.

Preaching, as defined by Robinson (2014), requires the application of biblical truth to the "personality and experience of the preacher" (p. 8). McDill (1999) wrote that the preacher's personality "will so color your preaching as to be a determining factor in its effect with the audience. Who you are as a person is as important as what you preach." (p. 22). The interactions within the focus groups affirmed McDill's assertion. The hearers repeatedly pointed to observing the lived-out practice of biblical truth as a means of determining the credibility of the shepherd–teacher. The interpersonal interactions with the shepherd–teacher outside the pulpit proved to be a measure for the congregation of the shepherd–teacher's trustworthiness in the pulpit. However,

this was complemented by communication of the historical, grammatical, and cultural context of biblical content.

Definitions of preaching generally demonstrated consensus about the content of the preaching moment. Scharf (2005) said preaching comes from “one or more texts of the Bible” (p. 13). Keller’s (2015) emphasis was on intent to convey “teachings of the Bible” specifically through “exposition of the Bible” (pp. 11–12). Heisler’s (2007) aim in preaching is “applying the text” (p. 21). Beyond the samples here, exposition of biblical text is a consistent theme in definitions of preaching. The research demonstrated that hearers value the unpacking of the grammatical, historical, cultural, and theological context of the biblical text. They pointed to the expositional teaching as an encouragement to continue their own independent study of the Bible. The deliberate learning strategies of the shepherd–teacher develop the content that equips hearers for Bible study and encourages them to continue such study. So, that part of the definition of preaching that might be more likely associated with teaching is an essential part of the formula of preaching.

RQ4 Practical Application

The dichotomy between teaching and preaching should not be viewed as rigid. Preaching has been characterized as exhortation, teaching as explaining (Larson, 2000). The preaching moment wields the cumulative effect of both. People are not bored, overwhelmed, or distracted by information on theological, literary, and historical context. Rather, it equipped and encouraged them to continue their studies. The hearers in the study were spurred to engage in the application and continuing study of sermon content via topics considered to lie within the realm of teaching—for example, the biblical passage’s historical, grammatical, and cultural context. The hearers also valued the shepherd–teacher’s capacity to challenge their preconceptions and

paradigms. The euphemism "stepping on toes" was a theme for the hearers, who said it encouraged their engagement with the Bible and the content of the preaching moment. The study included in its theological framework Larson's (2000) assertion: "Understand that both teaching and preaching are Spirit-given gifts which must be exercised for the good of the fellowship of believers" (p. 208). The researcher contends that the best exhortation is grounded in thorough biblical teaching.

The shepherd–teacher has a preeminent opportunity to engage with and steward the educational ministries of the Church not only as the leading teacher but also as a learner. The unique significance of the preaching moment provides an opportunity to bring intentionality and collaboration to the educational ministry of the Church. Trentham (2023) articulates the necessity of shepherd–teachers stewarding the educational ministry of the Church (pp. 158–159). He wrote, "Pastors are not the church's only leaders, nor its only teachers, but they are accountable for the church's direction and teaching in a singular way" (Trentham, 2023, p. 159). The interaction with congregational focus groups in this research affirmed the hearers' expectations that the shepherd–teacher serve as the church's leading teacher. Concurrently there was an appreciation for the shepherd–teacher's participation in the broader educational ministry in the Church. The encounters outside of the preaching moment during small group sessions, Sunday school, or weeknight Bible study created opportunities for questions to clarify the sermon content and specific interactions to guide individual application. The shepherd–teacher's participation as a peer in the learning community influences congregational perceptions as to the credibility of the shepherd–teacher and provides insight with which the shepherd–teacher can fulfill the call to comprehensively steward the educational ministries of the Church.

Summary

The qualitative nature of the research allowed the researcher to gather a large volume of information regarding the preaching moment across multiple cases. Analyzing the data produced results that are most relevant and practical for church ministry. Several findings and conclusions are especially relevant to the study's goal of better equipping the shepherd-teacher in carrying out the ministry of the Word. These include:

- The shepherd-teachers consistently recognized the need for an individual capacity to conduct research and study to select specific preaching themes, develop preaching content, and answer learning needs in the congregation. As discerned by the SDLRS, the attributes associated with SDL correspond with the attributes necessary to engage in a consistent preaching ministry. Institutions training shepherd-teachers could better equip their students by encouraging familiarity with their learning skills and characteristics.
- The shepherd-teacher's participation as a peer in the broader educational ministry of the church established an important sense of mutuality in learning and allowed the shepherd-teacher to better discern the learning needs of the congregation. The shepherd–teacher has a preeminent opportunity to engage with and steward the educational ministries of the Church not only as the leading teacher but also as a learner.
- The distinction between preaching and teaching need not be viewed as rigid. The fruit of the shepherd–teacher's study efforts in presenting historical, theological, and grammatical context and concepts surrounding biblical texts influenced the hearers' desire to continue studying the content of the preaching moment and the Bible. The hearers were also encouraged toward continued study by preaching content that challenged personal paradigms or exhorted change. The researcher concluded the best exhortation is grounded in thorough biblical teaching.

Research Limitations

The research was constrained by design to focus on local churches with shared doctrinal commitments, as established by their affiliation with a state-level denominational entity. The congregation's beliefs are expected to influence their ministry conduct significantly. For example, in all of the cases the sermon moment is the preeminent moment of the worship service. That is to say, the service builds toward the sermon. This may contrast with other traditions. Additionally, the shepherd-teachers demonstrated a similar expository preaching style.

Finally, the sample resulted in cases with smaller church size in suburban or rural context. This shared, significant attribute among the cases challenges the ability to generalize the findings of this research.

All of the shepherd–teachers in the case study scored in the top quartile of the SDLRS. The standard deviation within the group for the SDLRS was 4.44, representing a limited dispersion. Additionally, the findings from the SDLRS presented a negative kurtosis, indicating little opportunity to examine outliers. This hindered the researcher's ability to explore outcomes when the shepherd–teacher lacked qualities or attributes associated with SDL, as measured by the SDLRS.

Further Research

Considering the study findings, limitations, and delimitations, this exploratory study generated multiple questions that could advance the understanding of SDL's role for the shepherd–teacher and in the context of the local church during the preaching moment:

1. Explore the preaching moment in contexts beyond the sample addressed in this study (e.g., different preaching styles, congregational size, denomination, or use of a liturgical calendar).

2. Using exploratory qualitative studies, consider the current application of SDL within seminaries, including instructional practices, like learning contracts, or the availability of courses related to learning strategies.

3. Investigate shepherd–teachers' engagement in collaborative learning with other shepherd–teachers (e.g., ministry support groups, intentional mentoring relationships, and conferences) and its relationship with their capacity for SDL.

4. Explore the interaction between the discipleship processes within the church and the congregation's engagement with small group ministry (e.g., Sunday school, small groups, and life groups) in relation to the prevalence of self-directedness of the shepherd–teacher.

5. Evaluate whether intentional training on SDL or other learning theories affects sermon planning and preparation using a before-and-after study in concert with provision of said instruction.

6. Determine how seminary training influences capacity for SDL using a pre- and posttest design with an instrument measuring capacity for SDL periodically throughout the seminarians' academic careers.
7. Quantitative research could be explored to discern patterns or trends related to specific qualities or individual factors associated with SDL among shepherd–teachers.

Conclusion

In the cases examined, the pulpit was modeled as a principal tool for education in the local church. Each shepherd–teacher acknowledged the individual responsibility of discerning, developing, and delivering biblically faithful teaching for the preaching moment. The shepherd–teachers articulated consistent processes with which to research and study biblical text to communicate with clarity and conviction. Their application of learning processes seemed innate and intuitive. The results of the SDLRS and interviews with the shepherd–teachers demonstrated a consistent set of SDL attributes. This affirms the shepherd–teachers' assertion that the capacity to take initiative in learning is a seminal requirement for pastoral ministry. Any person exploring a call to ministry as a shepherd–teacher would do well to evaluate their capacity for self-directedness in learning. Additionally, their learning included reliance on collaborative relationships and peers.

The emphasis on community or collaborative learning was a surprising theme in research focused on SDL. During interviews, shepherd–teachers referred to the necessity of building the collective community. They alluded to relying on relationships and community to gain knowledge in their learning experiences. The shepherd–teachers employed SDL attributes to understand their congregations' learning needs better. The sermon samples showed the shepherd–teacher leveraging an understanding of the church's context, concerns, and life events to connect teaching to practical learning needs and heighten the hearers' awareness of their need to know. Additionally, the sense of the shepherd–teacher as a peer within the learning

community was repeated in the focus groups with congregants. The theme of collaboration highlights that SDL is not inherently independent; instead, it thrives in a collaborative environment.

The shepherd–teacher has a distinct responsibility to teach. However, they remain a peer within the learning community. Study and sound preaching were essential qualities that achieved credibility with the congregation. Still more, confidence in the content of the preaching moment for the congregation required intentional presence in the life of individuals and families in the congregation, providing occasions with which to demonstrate and apply biblical truth in real time. The assertion that successful ministry requires initiative in learning and the attributes associated with SDL cannot overwhelm the shepherd–teacher intentionally living out the content of their teaching in the context of their learning community—the local church.

Encouraging the exercise of SDL in the context of a peer community is consistent with the Church's aim to make disciples. The Church does not benefit from a pedagogical model that positions hearers to become passive recipients of the shepherd–teacher's learning. This does not move closer to the goal of equipping the body for the work of ministry. As gifted learners, the shepherd–teachers possess the capacity and opportunity to encourage self-directedness by leading the community through modeling of the use of learning resources, pointing hearers to additional resources, and, most of all, living as part of the peer community on a mutual and shared journey.

REFERENCES

Akin, D. L., Curtis, B., & Rummage, S. (2011). *Engaging exposition.* B&H Publishing Group.

Altheide, D. L. (1996). *Qualitative media analysis*. SAGE Publications. https://doi.org/10.4135/9781412985536

Anders, M. (1999). *Galatians-Colossians*. Broadman & Holman Publishers.

Argyris, C. (2002). Double-loop learning, teaching, and research. *Academy of Management Learning & Education*, 1(2), 206–218. http://www.jstor.org/stable/40214154

Argyris, C. (2004). *Reasons and rationalizations: The limits to organizational knowledge*. Oxford University Press.

Argyris, C., & Boonstra, J. (2008). Double-Loop Learning and Organizational Change. In *Dynamics of organizational change and learning* (pp. 389–402). J. Wiley & Sons. https://doi.org/10.1002/9780470753408.ch19

Ayabwile, T. (2013). Brothers we should stink. In D. L. Akin, T. Anyabwile, M. Bullmore, S. Crabtree, R. C. Ortlund Jr., J. Piper, R. C. Sproul Jr., J. Vanderstelt, & D. Wilson (Eds.), *Still not professionals: Ten pleas for today's pastors*. Desiring God.

Balz, H. R., & Schneider, G. (1990). *Exegetical dictionary of the New Testament* (Vol. 2). Eerdmans.

Beard, C. B. (2017). Connecting spiritual formation and adult learning theory: An examination of common principles. *Christian Education Journal*, *14*(2), 247–269. https://doi.org/10.1177/073989131701400202

Beard, C. B. (2023). Experiential Learning. In A. Belzer, B. Dashew, & H. Beder (Eds.), *Understanding the adult learner: Perspectives and practices* (pp. 193–211). Routledge. https://doi.org/10.4324/9781003448471

Behm, J., & Würthwein, E. (1964). νοέω [noeo, understand] In G. Kittel, G. W. Bromiley, & G. Friedrich (Eds.), *Theological dictionary of the New Testament* (Vol. 4, p. 950). Eerdmans.

Bonham, L. A. (1991). Guglielmino's self-directed readiness learning scale: What does it measure. *Adult Education Quarterly*, *41*(2), 92–99. https://doi.org/10.1177/0001848191041002003

Bredfeldt, G. (2006). *Great leader—Great teacher: Recovering the biblical vision for leadership*. Moody Publishers.

Brockett, R. (2023). Self-directed learning: A 21st century imperative. In A. Belzer, B. Dashew, & H. Beder (Eds.), *Understanding the adult learner: Perspectives and practices* (pp. 173–191). Routledge. https://doi.org/10.4324/9781003448471

Brockett, R., & Hiemstra, R. (1991). Self-direction in learning: Perspectives in theory, research, and practice. Routledge.

Brockett, R., & Hiemstra, R. (2012). *Reframing the meaning of self-directed learning: An updated model* [Conference proceeding]. Adult Education Research Conference, Saratoga, New York. https://newprairiepress.org/aerc/2012/papers/22

Brookfield, S. (Ed.). (1985). *Self-directed learning: From theory to practice*. Jossey-Bass.

Bultman, R. (1985). ginosko [to know] In G. Kittel, G. W. Bromiley, & G. Friedrich (Eds.), *Theological dictionary of the New Testament* (Vol. 1, pp. 689-719). Eerdmans.

Calvin, J. (1995). Acts Chapter 6. In J. I. Packer & A. McGrath (Eds.), *Acts (Ac 6:2)*. Crossway Books.

Corbin, J., & Strauss, A. (2008). *Basics of qualitative research (3rd ed.): Techniques and procedures for developing grounded theory*. SAGE Publications.

Corley, B., Lemke, S., & Lovejoy, G. (2002). *Biblical hermeneutics: A comprehensive introduction to interpreting Scripture* (2nd ed.). Broadman & Holman.

Costa, A. L., & Kallick, B. (2004). *Assessment strategies for self-directed learning*. Corwin Press.

Creswell, J. W., & Creswell, J.D. (2018). *Research design: Qualitative, quantitative, and mixed methods approaches* (5th ed.). SAGE Publications.

Cyr, J. (2019). *Focus groups for the social science researcher (1st ed.)*. Cambridge University Press.

Delahaye, B., & Choy, S. (2000). The Learning Preference Assessment (Self-Directed Learning Readiness Scale). In Maltby, J., Lewis, C.A., & Hill, A. (2000) *Commissioned reviews of 250 psychological tests*. Edwin Mellen Press.

DeWalt, K. M., & DeWalt, B. R. (2010). *Participant observation: A guide for fieldworkers (2nd ed.)*. Rowman & Littlefield.

Douglas, L. M. (2000). Learning theories. In A.S. Morreau (Ed.), *Evangelical dictionary of world missions* (p. 569). Baker Books.

Ellsworth, W. (2000). *The power of speaking God's Word*. Reformation & Revival.

Emanuel, D. M. (2014). Thinking. In D. Mangum, D. R. Brown, R. Klippenstein, & R. Hurst (Eds.), *Lexham theological wordbook*. Lexham Press.

Emslie, N. (2016). Transformative learning and ministry formation. *Journal of Adult Theological Education*, *13*(1), 48–63. https://doi.org/10.1080/17407141.2016.1158497

English standard version. (2001/2016). Crossway Bibles.

Field, L. (1989). An investigation into the structure, validity, and reliability of Guglielmino's self-directed learning readiness scale. *Adult Education Quarterly*, *39*(3), 125-139. https://doi.org/10.1177/0001848189039003001

Gangel, K. O. (1998). *Acts* (Vol. 5). Broadman & Holman Publishers.

Garrison, D. R. (1997). Self-directed learning: Toward a comprehensive model. *Adult Education Quarterly*, *48*(1), 18-33. https://doi.org/10.1177/074171369704800103

Gibson, S. M. (2018). *The worlds of the preacher: Navigating biblical, cultural, and personal contexts.* Baker Academic.

Gournelos, T. (2019). *Doing academic research: A practical guide to research methods and analysis*. Routledge.

Griffiths, J. (2017). *Preaching in the New Testament: An exegetical and biblical-theological study.* Intervarsity Press.

Guglielmino, L. (1978). *Development of the self-directed learning readiness scale* [Doctoral dissertation]. University of Georgia.

Guglielmino, L. (1989). Reactions to Field's investigation into the SDLRS. *Adult Education Quarterly*, *39*(4), 235–245. https://doi.org/10.1177/0001848189039004005

Guglielmino, L., & Guglielmino, P. (2020). *Guglielmino & Associates, LLC*. Learning Preference Assessment. http://www.lpasdlrs.com/

Guthrie, D. (1994). 1 Timothy. In D. A. Carson, R. T. France, J. A. Motyer, & G. J. Wenham (Eds.), *New Bible commentary: 21st century edition* (4th ed., p. 1301). Inter-Varsity Press.

Hamilton, L., & Corbett-Whittier, C. (2013). *Using case study in education research*. SAGE Publications.

Harris, W. R. (1979). Pastor. In G. W. Bromiley (Ed.), *The international standard Bible encyclopedia, revised* (Vol. 3, p. 679). Wm. B. Eerdmans. https://ref.ly/logosres/isbe

Hedin, N. (2010). Experiential learning: Theory and challenges. *Christian Education Journal*, *7*(1), 107–117. https://doi.org/10.1177/073989131000700108

Heisler, G. (2007). *Spirit-led preaching: The Holy Spirit's role in sermon preparation and delivery.* B&H Academic.

Helm, P. (1988). Disciple. In Elwell, W.A. (Ed.), *Baker encyclopedia of the Bible* (Vol. 1, p. 629). Baker Book House.

Henry, G. (2011) *Malcolm Shepherd Knowles: A history of his thought*. Nova Science Publishers.

Henschke, J. (1997). In memoriam: Malcolm S. Knowles. *Adult Learning*, *9*(2), 2-4. https://go.openathens.net/redirector/liberty.edu?url=https://www.proquest.com/scholarly-journals/memoriam-malcolm-s-knowles/docview/208162611/se-2

Hertig, P. (2002). Transforming theological education through experiential learning in urban contexts. *Mission Studies*, *19*(1-2), 56-73. https://doi.org/ 10.1163/157338302X00198

Hiemstra, R. (2003). More than three decades of self-directed learning: From whence have we come? *Adult Learning*, *14*(4), 5–8. https://doi.org/10.1177/104515950301400402

Hippolytus. (1886). Against the heresy of one Noetus (S. D. F. Salmond, Trans.). In A. Roberts, J. Donaldson, & A. C. Coxe (Eds.), *Fathers of the third century: Hippolytus, Cyprian, Novatian, Appendix* (Vol. 5, p. 227). Christian Literature Company. (Original work published ca. 235)

Hoggan, C., & Kasl, E. (2023). Transformative Learning. In A. Belzer, B. Dashew, & H. Beder (Eds.), Understanding the adult learner: Perspectives and practices (pp. 213–229). Routledge. https://doi.org/10.4324/9781003448471

International Society for Self-Directed Learning. (2024). *About us*. https://www.sdlglobal.com/about-us

Jamieson, R., Fausset, A. R., & Brown, D. (1997). *Commentary critical and explanatory on the whole Bible* (Vol. 2). Logos Research Systems.

Kaak, P., & LaPorte, M. (2022). A faith-informed model for experiential learning applied to faith integrated service-learning. *Christian Higher Education*, *21*(1–2), 11–30. https://doi.org/10.1080/15363759.2021.2004563

Kang, S. S., & Parrett, G. A. (2009). *Teaching the faith, forming the faithful: A biblical vision for education in the Church*. Intervarsity Press.

Keller, T.J. (2015). *Preaching: Communicating faith in an age of skepticism*. Viking.

Knowles, M. (1970). *The modern practice of adult education: Andragogy vs. pedagogy*. Association Press.

Knowles, M. (1975). *Self-directed learning: A guide for learners and teachers*. Association Press.

Knowles, M. S. (1977). Adult learning processes: Pedagogy and andragogy. *Religious Education*, *72*(2), 202–211. https://doi.org/10.1080/0034408770720210

Knowles, M. S., Holton, E. F. I., & Swanson, R. A. (2015). *The adult learner: The definitive classic in adult education and human resource development (8th ed.)*. Routledge.

Kolb, D. (2014). *Experiential learning: Experience as the source of learning and development*. Pearson FT Press.

Larson, K. (2000). *I & II Thessalonians, I & II Timothy, Titus, Philemon* (Vol. 9). Broadman & Holman Publishers.

Lawson, S. (2022). *Called to preach: Fulfilling the high calling of expository preaching*. Baker Publishing Group.

Lewis, S. (1992). Andragogy in the Sunday school. *Christian Education Journal*, *12*(3), 166–177.

Long, H. (1992). Self directed learning: A guide for learners and teachers. In G. Confessore & S. Confessore (Eds.), *Guideposts to self-directed learning* (pp. 37–46). Organization Design and Development.

Marmon, E. L. (2013). Transformative learning theory: Connections with Christian adult education. *Christian Education Journal*, *10*(2), 424–431. https://doi.org/10.1177/073989131301000212

McCune, S. K. (1988). *A meta analytic study of adult self-direction in learning: A review of the research from 1977 to 1987* (Publication No. 8903377) [Doctoral dissertation, Texas A&M University]. ProQuest Dissertations and Theses Global.

McDill, W. V. (1999). *The moment of truth: A guide to effective sermon delivery*. Broadman & Holman. https://ref.ly/logosres/mmttruth

Merkle, B. L. (2008). *40 questions about elders and deacons*. Kregel Ministry.

Merriam, S. B. (2001). Andragogy and self-directed learning: Pillars of adult learning theory. *New Directions for Adult & Continuing Education*, *2001*(89), 3-13. https://doi.org/10.1002/ace.3

Merriam, S. B., & Bierema, L. L. (2014). *Adult learning: Linking theory and practice*. Jossey-Bass.

Merriam, S. B., & Tisdell, E. J. (2015). *Qualitative research: A guide to design and implementation.* John Wiley & Sons Incorporated.

Merriam-Webster. (n.d.). Sagacious. In *Merriam-Webster.com dictionary*. Retrieved October 11, 2023, from https://www.merriam-webster.com/dictionary/sagacious

Mezirow, J. (2000). Learning to think like an adult: Core concepts of transformation theory. In J. Mezirow (Ed.), *Learning as transformation* (pp. 3–33). Jossey-Bass.

Mikaelian, M. (2018). The transformative learning experiences of Southern California church-based small group members. *Christian Education Journal*, *15*(2), 171–188. https://doi.org/10.1177/0739891318784307

Miller, C. (2006). *Preaching: The art of narrative exposition.* Baker Books.

Mitchell, M. T. (2010). *Leading, teaching, and making disciples: World-class Christian education in the church, school, and home*. Crossbooks.

Moo, D. J. (1994). Romans. In D. A. Carson, R. T. France, J. A. Motyer, & G. J. Wenham (Eds.), *New Bible commentary: 21st century edition* (4th ed., p. 1122). Inter-Varsity Press.

Morgan, D. L. (1997). *Focus groups as qualitative research* (2nd ed.). SAGE Publications. https://doi.org/10.4135/9781412984287

Nehemiah, J. (2021). *Leadership training in the hands of the Church: Experiential learning and contextual practices in North Africa and the Middle East.* Langham Creative Projects.

Nehrbass, K., & Rhoades, J. (2021). Jesus' Use of Experiential Learning in the Sending of the Seventy: Implications for Ministry Practicums. *Christian Education Journal.*, *18*(1), 74–88. https://doi.org/10.1177/0739891320908279

Nelson, R. S. J. (2021). Redemptive transformational learning for ministry and theological education, Part 1. *Christian Education Journal*, *18*(3), 387–405. https://doi.org/10.1177/0739891320975776

New international version. (2011). Zondervan.

Newton, G. (2012). *Heart-deep teaching: Engaging students for transformed lives*. Broadman & Holman.

Oddi, L. F. (1986). Development and validation of an instrument to identify self-directed continuing learners. *Adult Education Quarterly*, *36*(2), 97–107. https://doi.org/10.1177/0001848186036002004

Oddi, L. F. (1987). Perspectives on self-directed learning. *Adult Education Quarterly*, *38*(1), 21–31. https://doi.org/10.1177/0001848187038001003

Olson, K. (2016). *Essentials of qualitative interviewing*. Routledge

Pace, R.S., (2018). *Preaching by the book*. (H. Thomas, Ed.). B&H Academic.

Quicke, M.J. (2003). *360-degree preaching: Hearing, speaking, and living the word.* Baker Academic.

Rachal, J. R. (2002). Andragogy's detectives: A critique of the present and a proposal for the future. *Adult Education Quarterly*, *52*(3), 210-227. https://doi.org/10.1177/0741713602052003004

Rengstorf, K. H. (1964). διδάσκω, [didasko, to teach]. In G. Kittel, G. W. Bromiley, & G. Friedrich (Eds.), *Theological dictionary of the New Testament* (Vol. 2, p. 165). Eerdmans.

Ridder, H. (2019). *Case study research: Approaches, methods, contribution to theory*. Rainer Hampp.

Robinson, H. W. (2014). *Biblical preaching: The development and delivery of expository messages (3rd ed.)*. Baker Academic.

Rozsahegyi, T. (2019). Case study. In M. Lambert (Ed.), *Practical research methods in education: An early researcher's critical guide* (pp. 124–131). Routledge.

Scharf, G. (2005). *Prepared to preach: God's work & ours in proclaiming his word*. Mentor.

Senturk, C., & Zeybek, G. (2019). Overview of learning from past to present and self-directed learning. In F. G. Giuseffi (Ed.), *Self-directed learning strategies in adult educational contexts* (pp. 138–182). IGI Global.

Smith, J. K. A. (2009). *Desiring the Kingdom: Worship, worldview, and cultural formation* (Vol. 1). Baker Academic.

Stake, R. E. (2006). *Multiple case study analysis*. Guilford Press.

Stockdale, S. L., & Brockett, R. G. (2011). Development of the PRO-SDLS: A measure of self-direction in learning based on the personal responsibility orientation model. *Adult Education Quarterly*, *61*(2), 161–180. https://doi.org/10.1177/0741713610380447

Stott, J. R. W. (1979). *God's new society: The message of Ephesians*. InterVarsity Press.

Stott, J. R. W., & Scharf, G. (2015). *The challenge of preaching*. William B. Eerdmans Publishing Company.

Stuart, J. (2011). Applying adult education principles within the church sermons: Some theoretical implications. *The Journal of Adult Theological Education*, *8*(2), 115–129. https://doi.org/10.1558/JATE.v8i2.115

Taylor, B., & Kroth, M. (2009). Andragogy's transition into the future: Meta-analysis of andragogy and its search for a measurable instrument. *Journal of Adult Education*, *38*(1), 1–11. https://www.proquest.com/scholarly-journals/andragogys-transition-into-future-meta-analysis/docview/204494009/se-2?accountid=12085

Tolliver, D. E., & Tisdell, E. J. (2006). Engaging spirituality in the transformative higher education classroom. *New Directions for Adult and Continuing Education*, *2006*(109), 37–47. https://doi.org/10.1002/ace.206

Tough, A. (1978). Major learning efforts: Recent research and future directions. *Adult Education*, *28*(4), 250–263. https://doi.org/10.1177/074171367802800403

Trentham, X. X. (2023). On the relation of teaching to preaching: A discussion. *Christian Education Journal*, *20*(2), 157-175. https://doi.org/10.1177/07398913231207867

Trester, E. (1984). The biblical andragogy clinic. In M. S. Knowles (Ed.), *Andragogy in action: Applying modern principles of adult learning* (pp. 343–351). Jossey-Bass.

Van Woezik, T. E. T., Koksma, J. J.-J., Reuzel, R. P. B., Jaarsma, D. C., & van der Wilt, G. J. (2021). There is more than 'I' in self-directed learning: An exploration of self-directed learning in teams of undergraduate students. *Medical Teacher*, *43*(5), 590–598. https://doi.org/10.1080/0142159X.2021.1885637

Vines, J., & Shaddix, J. L. (2017). *Power in the pulpit: How to prepare and deliver expository sermons (1st ed.)*. Moody Publishers.

Vines, J., & Shaddix, J. L. (2017). *Progress in the pulpit: How to grow in your preaching*. Moody Publishers.

Wilson, J.C. (2013). *The pastor's justification: Applying the work of Christ in your life and ministry.* Crossway Publishing.

Yin, R. K. (2016). *Qualitative research from start to finish* (2nd ed.). Guilford Press.

Yin, R. (2018). *Case study research and applications: Design and methods*. SAGE.

Young, K. M. (1995). The use of andragogy in Christian education. *Christian Education Journal*, *16*(1), 79–84.

Yount, W. (2010). *Created to learn: A Christian teacher's introduction to educational psychology (2nd ed.)*. B&H Publishing Group.

APPENDIX A: IRB APPROVAL LETTER

LIBERTY UNIVERSITY.
INSTITUTIONAL REVIEW BOARD

March 2, 2022

Matthew Gowin
Brian Pinzer

Re: IRB Exemption - IRB-FY21-22-116 GREAT LEADER – GREAT LEARNER: A MULTIPLE-CASE STUDY OF SHEPHERD-TEACHERS IN THE CHURCH CONSIDERING SELF-DIRECTED LEARNING AND THE PREACHING MOMENT

Dear Matthew Gowin, Brian Pinzer,

The Liberty University Institutional Review Board (IRB) has reviewed your application in accordance with the Office for Human Research Protections (OHRP) and Food and Drug Administration (FDA) regulations and finds your study to be exempt from further IRB review. This means you may begin your research with the data safeguarding methods mentioned in your approved application, and no further IRB oversight is required.

Your study falls under the following exemption category, which identifies specific situations in which human participants research is exempt from the policy set forth in 45 CFR 46:104(d):

Category 2.(iii). Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met:
The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by §46.111(a)(7).

Your stamped consent form(s) and final versions of your study documents can be found under the Attachments tab within the Submission Details section of your study on Cayuse IRB. Your stamped consent form(s) should be copied and used to gain the consent of your research participants. If you plan to provide your consent information electronically, the contents of the attached consent document(s) should be made available without alteration.

Please note that this exemption only applies to your current research application, and any modifications to your protocol must be reported to the Liberty University IRB for verification of continued exemption status. You may report these changes by completing a modification submission through your Cayuse IRB account.

If you have any questions about this exemption or need assistance in determining whether possible modifications to your protocol would change your exemption status, please email us at irb@liberty.edu.

Sincerely,
G. Michele Baker, MA, CIP
Administrative Chair of Institutional Research
Research Ethics Office

APPENDIX B: CONSENT FOR PASTOR

Title of the Project: Great Leader-Great Learner: A Multiple-Case Study of Shepherd-Teachers in the Church Considering Self-Directed Learning and the Preaching Moment

Principal Investigator: Matthew T. Gowin, MDiv, Doctoral Candidate, Liberty University

Invitation to be Part of a Research Study

You are invited to participate in a research study. To participate, you must be an adult and serving in a local church as the primary teaching pastor. Taking part in this research project is voluntary.

Please take time to read this entire form and ask questions before deciding whether to take part in this research.

What is the study about and why is it being done?

The purpose of the study is to explore the learning preferences of the pastor and how those traits inform the content, delivery, and congregational perceptions of the sermon. The aim is to gain knowledge that will help better equip pastors in communicating biblical truth.

What will happen if you take part in this study?

If you agree to be in this study, I will ask you to do the following things:

1. Complete a questionnaire related to your learning preferences. The questionnaire will be available electronically and is completed at your own pace and convenience. The questionnaire includes 58 items and will take about an hour to complete.

2. Participate in an in-depth interview that addresses sermon preparation, learning preferences, and communicates the results of the questionnaire. The interview will be documented via an audio recording. The interview will require one to two hours to complete.

3. Provide permission to allow the researcher to observe several occasions of corporate teaching (e.g., the sermon) during a normal gathering of the church. The sermon may be recorded via an audio device.

4. Provide permission for the researcher to conduct a focus group with participants in the church gathering follow the preaching moment (e.g., after the service).

5. Provide access to sermon notes created in preparation for the sermon and used during the sermon delivery.

6. Participate in a follow-up interview with the researcher to consider the research findings and knowledge gained. The interview will require approximately an hour to complete.

How could you or others benefit from this study?

The direct benefits participants should expect to receive from taking part in this study are an increased understanding of personal learning skills.

Benefits to society include an increased base of knowledge to enhance the equipping of pastors to effectively communicate biblical truth.

What risks might you experience from being in this study?

The risks involved in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

How will personal information be protected?

The records of this study will be kept private. Published reports will not include any information that will make it possible to identify a subject. Research records will be stored securely, and only the researcher will have access to the records. Data collected from you may be shared for use in future research studies or with other researchers. If data collected from you is shared, any information that could identify you, if applicable, will be removed before the data is shared. Participant responses will be kept confidential through the use of codes. Interviews will be conducted in a location where others will not easily overhear the conversation.

- Data will be stored on a password-locked computer and may be used in future presentations and in the development of written research report. After five years, all electronic records will be deleted.]

- Interviews/focus groups and sermons will be recorded and transcribed. Recordings will be stored on a password locked computer for five years and then erased. Only the researcher will have access to these recordings.

- Confidentiality cannot be guaranteed in focus group settings. While discouraged, other members of the focus group may share what was discussed with persons outside of the group.

Is study participation voluntary?

Participation in this study is voluntary. Your decision whether or not to participate will not affect your current or future relations with Liberty University. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

What should you do if you decide to withdraw from the study?

If you choose to withdraw from the study, please contact the researcher at the email address/phone number included in the next paragraph. Should you choose to withdraw, data collected from you will be destroyed immediately and will not be included in this study.

Whom do you contact if you have questions or concerns about the study?

The researcher conducting this study is Matthew T. Gowin. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact him at [redacted]. You may also contact the researcher's faculty sponsor, Dr. Brian Pinzer, at [redacted].

Whom do you contact if you have questions about your rights as a research participant?

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the Institutional Review Board, 1971 University Blvd., Green Hall Ste. 2845, Lynchburg, VA 24515 or email at irb@liberty.edu.

Disclaimer: The Institutional Review Board (IRB) is tasked with ensuring that human subjects research will be conducted in an ethical manner as defined and required by federal regulations. The topics covered and viewpoints expressed or alluded to by student and faculty researchers are those of the researchers and do not necessarily reflect the official policies or positions of Liberty University.

Your Consent

By signing this document, you are agreeing to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.

☐ The researcher has my permission to audio-record me as part of my participation in this study.

____

Printed Subject Name

____

Signature & Date

APPENDIX C: CONSENT FOR FOCUS GROUP

Title of the Project: Great Leader-Great Learner: A Multiple-Case Study of Shepherd-Teachers in the Church Considering Self-Directed Learning and the Preaching Moment

Principal Investigator: Matthew T. Gowin, MDiv, Doctoral Candidate, Liberty University

Invitation to be Part of a Research Study

You are invited to participate in a research study. To participate, you must be an adult who participated in the preaching event. Taking part in this research project is voluntary.

Please take time to read this entire form and ask questions before deciding whether to take part in this research.

What is the study about and why is it being done?

The purpose of the study is to explore the learning preferences of the pastor and how those traits inform the content, delivery, and congregational perceptions of the sermon. The aim is to gain knowledge that will help better equip pastors in communicating biblical truth.

What will happen if you take part in this study?

If you agree to be in this study, I will ask you to do the following things:

7. Participate in a focus group following the preaching moment (e.g., after the service). The focus group will address perceptions of the content and delivery of the sermon and take approximately 1 hour. The focus group will be audio-recorded.

How could you or others benefit from this study?

Participants should not expect to receive a direct benefit from taking part in this study.

Benefits to society include an increased base of knowledge to enhance the equipping of pastors to effectively communicate biblical truth.

What risks might you experience from being in this study?

The risks involved in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

How will personal information be protected?

The records of this study will be kept private. Published reports will not include any information that will make it possible to identify a subject. Research records will be stored securely, and only the researcher will have access to the records. Data collected from you may be shared for use in future research studies or with other researchers. If data collected from you is shared, any

information that could identify you, if applicable, will be removed before the data is shared. Participant responses will be kept confidential through the use of codes. Interviews will be conducted in a location where others will not easily overhear the conversation.

- Data will be stored on a password-locked computer and may be used in future presentations and in the development of written research report. After five years, all electronic records will be deleted.]
- Interviews/focus groups and sermons will be recorded and transcribed. Recordings will be stored on a password locked computer for five years and then erased. Only the researcher will have access to these recordings.
- Confidentiality cannot be guaranteed in focus group settings. While discouraged, other members of the focus group may share what was discussed with persons outside of the group.

Is study participation voluntary?

Participation in this study is voluntary. Your decision whether or not to participate will not affect your current or future relations with Liberty University. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

What should you do if you decide to withdraw from the study?

If you choose to withdraw from the study, please contact the researcher at the email address/phone number included in the next paragraph. Should you choose to withdraw, data collected from you, apart from focus group data, will be destroyed immediately and will not be included in this study. Focus group data will not be destroyed, but your contributions to the focus group will not be included in the study if you choose to withdraw.

Whom do you contact if you have questions or concerns about the study?

The researcher conducting this study is Matthew T. Gowin. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact him at [redacted].
You may also contact the researcher's faculty sponsor, Dr. Brian Pinzer, at [redacted].

Whom do you contact if you have questions about your rights as a research participant?

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the Institutional Review Board, 1971 University Blvd., Green Hall Ste. 2845, Lynchburg, VA 24515 or email at irb@liberty.edu.

Disclaimer: The Institutional Review Board (IRB) is tasked with ensuring that human subjects research will be conducted in an ethical manner as defined and required by federal regulations. The topics covered and viewpoints expressed or alluded to by student and faculty researchers are those of the researchers and do not necessarily reflect the official policies or positions of Liberty University.

Your Consent

By signing this document, you are agreeing to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.

☐ The researcher has my permission to audio-record me as part of my participation in this study.

____

Printed Subject Name

____

Signature & Date

APPENDIX D: RECRUITMENT TEMPLATE

Dear [Recipient]:

As a graduate student in the Rawlings School of Divinity at Liberty University, I am conducting research as part of the requirements for a doctorate degree. The title of my research project is Great Leader-Great Learner: A Multiple-Case Study of Shepherd-Teachers in the Church Considering Self-Directed Learning and the Preaching Moment, and the purpose of my research is to explore the influence of the shepherd-teacher's learning attributes informed by adult learning theory on the preparation, presentation, and perception of the preaching moment within a conservative Southern Baptist congregation. I am writing to invite eligible participants to join my study.

Participants must be an adult and serving in a church as the primary teaching pastor. Taking part in this research project is voluntary.

Participants, if willing, will be asked to:

- Acknowledge consent to participate in the research.
- Complete an initial screening survey.
- Complete a questionnaire about learning preferences.
- Participate in in-person interviews.

It should take approximately 4 hours to complete the procedures listed. Names and other identifying information will be requested as part of this study, but the information will remain confidential.

To participate, please click here (include hyperlink to online survey). A consent document is provided as the first page of the survey. The consent document contains additional information about my research. After you have read the consent form, please click the button to proceed to the survey. Doing so will indicate that you have read the consent information and would like to take part in the research.

A consent document is provided as an attachment to this message and on the first page of the survey. The consent document contains additional information about my research. After you have read the consent form, please click the button to proceed to the survey. Doing so will indicate that you have read the consent information and would like to take part in the research.

Sincerely,

Matthew T. Gowin, MDiv
Doctoral Candidate, Rawlings School of Divinity, Liberty University

APPENDIX E: RECRUITMENT FOLLOW-UP TEMPLATE

Dear [Recipient]:

As a graduate student in the Rawlings School of Divinity at Liberty University, I am conducting research as part of the requirements for a doctorate degree. The title of my research project is Great Leader-Great Learner: A Multiple-Case Study of Shepherd-Teachers in the Church Considering Self-Directed Learning and the Preaching Moment, and the purpose of my research is to explore the influence of the shepherd-teacher's learning attributes informed by adult learning theory on the preparation, presentation, and perception of the preaching moment within a conservative Southern Baptist congregation.

Two weeks ago and e-mail was sent to you inviting you to participate in a research study. This follow-up message is being sent to remind you to complete the initial survey if you would like to participate and have not already done so. The deadline for participation is [Date].

Participants, if willing, will be asked to:

- Acknowledge consent to participate in the research.
- Complete an initial screening survey.
- Complete a questionnaire about learning preferences.
- Participate in an in-person interview.

It should take approximately 4 hours to complete the procedures listed. Names and other identifying information will be requested as part of this study, but the information will remain confidential.

To participate, please click here (include hyperlink to online survey). A consent document is provided as the first page of the survey. The consent document contains additional information about my research. After you have read the consent form, please click the button to proceed to the survey. Doing so will indicate that you have read the consent information and would like to take part in the research.

Sincerely,

Matthew T. Gowin, MDiv
Doctoral Candidate, Rawlings School of Divinity, Liberty University

APPENDIX F: SCREENING SURVEY QUESTIONS

Instructions: Thank you for choosing to participate. Please answer the following questions to help the researcher discern how you can best contribute to the research. If at any time you decide not to continue participating, you may exit the survey by closing your web browser.

1. First and last name
2. What is your current title (e.g., pastor, elder, lead pastor, etc.)?
3. Are you the person primarily responsible for delivering the sermon?
4. Please provide the name of the church where you serve.
5. What is the address for the church?
6. How long have you served in your current role at this church?
7. What is the approximate Sunday morning attendance?

Describe training you have received related to sermon preparation and delivery. When and where did the training occur?

APPENDIX G: FOCUS GROUP QUESTIONS

1. Share what you plan to do, if anything, as a response to hearing today's message?

2. What illustrations or references does the pastor offer that are most useful to you?

3. Was there any part of the content or delivery that made the sermon more understandable? Anything that made it more difficult to understand?

4. Were you encouraged or equipped to further study the text or concepts included in today's message? What encourages you to engage in further study?

5. How would you characterize or describe the pastor's teaching or preaching?

APPENDIX H: FIELD OBSERVATION NOTES

Sermon Observation Field Notes

Site #
Observation Date & Time:
Principle biblical text:

Main Idea of the Message (MIM):

Did the shepherd-teacher introduce the message by relating it to current events or practical issues of concern to the congregation ?
 YES NO If Yes, Briefly note the issue:

Did the message indicate a clear objective (e.g. expected changes in perspective or behavior)?
 YES NO If Yes, Briefly note an example:

Was an outline discernible during delivery (e.g., document the main points and secondary points)?

Did the shepherd-teacher use illustrations or stories that connected the message to events or activities likely familiar to the congregation?
 YES NO If Yes, Briefly note an example:

Is the environment "physically and psychologically" comfortable? Do the hearers appear relaxed and comfortable? Provide brief notes to explain the response.
 YES NO
Briefly explain:

Did the sermon include any direction to additional materials (e.g., recommended reading or books, further study resources)?
☐ YES ☐ NO

Were any printed or digital handouts provided (e.g., outline, reflective questions, group discussion starters)? If yes, please collect a copy.
☐ YES ☐ NO

Additional Notes/Observations:

APPENDIX I: CODE PROTOCOL WITH FREQUENCIES

Code	Memo	*f*
Total		873
Personal narrative	The shepherd–teacher uses a personal situation or his own experience to emphasize a point of teaching.	25
Mechanics	This is a code for those moments when the shepherd–teacher expressly shares how he handled the text or conducted his study of the Bible. This is akin to the colloquial adage of showing "how the sausage is made."	10
Prayer	This code marks the time when the shepherd–teacher is praying during the preaching moment.	14
Scripture	This code marks the moments when the shepherd–teacher is reading directly from the Bible aloud for the congregation.	100
Previous preaching	The shepherd–teacher connects the content of the current preaching moment to teaching or content in a previous preaching moment, routinely with a reference to the time, sermon title, or sermon series.	22
Main idea	The shepherd–teacher plainly states the main idea, or primary principle, they intend to communicate through the preaching moment.	35
Additional resources	The shepherd–teacher provides direction to access or find additional learning materials related to the topic (e.g., recommended reading, further studies, other sermons).	7
Comfortable	A "psychologically and physically" comfortable learning environment is an element associated with self-directed learning. The code marks qualities assessed as making the environment comfortable.	6
Clear objective	The preaching moment provides a clear objective (e.g., expected change in perspective or behavior). This demonstrates an ability to translate learning needs into objectives.	7
Current events	The shepherd–teacher introduces the preaching moment by relating it to current events (e.g., identifying a need for learning).	7
Credibility	Credibility speaks to the source of confidence the hearers have in the reliability of the content of the preaching moment.	32
Workmanship	Features of the preaching moment that communicate the intentionality, skill, and work applied by the shepherd–teacher to communicate well.	8

Code	Memo	*f*
Distracting	The content of the preaching moment or learning environment creates a negative sentiment that distracts from the preaching moment.	17
Relatable	The content of the preaching moment creates a connection with the hearer.	34
Facilitative	The members of the focus group identify sermon content as helpful in encouraging continued personal study of the sermon topic.	41
Unity	The content of the preaching moment connects the hearer with the community based on a shared belief, need, or sense of purpose.	7
Affirmation	The content of the sermon is an affirmation of the hearers' beliefs and worldviews.	10
Sermon planning	The shepherd–teacher develops a calendar or plan for weekly services. Some calendars are more deliberate—creating a schedule well in advance with specific themes or main ideas.	1
Sagacity	This code identifies sermon planning that is almost nonplanning; that is, the topic, theme, or biblical text of the preaching moment is driven by the shepherd–teacher's intuition, discernment, or distinct sense of supernatural leading. The term "sagacity" relates to the application of "keen and farsighted penetration and judgement: discerning" or a quality "caused by or indicating acute discernment" (Merriam-Webster, n.d.).	7
Topic	The sermon planning is driven by a topic, generally related to contemporary issues, church calendar, or the church life.	5
Bible	The planning is centered on preaching through specific books of the Bible.	5
Self-directed learning qualities	Practices associated with self-directed learning, as described by Knowles (1975, pp. 23–24)	
Validate evidence of accomplishing learning objectives		5
Strategize to use learning resources		13
Identify resources for learning		12
Relate to teachers as facilitators		0

Code	Memo	*f*
Translate learning needs to objectives		4
Diagnose learning needs		15
Peer collaboration		11
Self-concept of independence/self-directedness		9
Understanding learners/learning skills		7
Sermon notes	The hearers are provided with an outline or notetaking materials for the sermon, such as a fill-in-the-blank sheet or a point-by-point outline.	2
Audio/visual	The setting for the preaching moment includes audio/visual support (e.g., screens, audio system).	6
Application	The hearers' reference to practical steps or behaviors they intend to implement based on the influence of the preaching moment.	29
New information	The hearers' acknowledgement that they have gained new information from the preaching moment. The content provides clarity to their beliefs or specific theological concepts.	11
Continued study	The hearers' intent to engage in future study or continued study with the biblical text or topic shared during the preaching moment.	27
Extrabiblical sources	The shepherd–teacher relies on resources or material outside of scripture to prepare and inform the preaching moment (e.g., commentary, theological volumes).	12
Hearer focus	The shepherd–teacher considers or evaluates the specific situation or spiritual situation of the hearer during the preparation of the sermon content.	16
Main idea	The teaching moment has one main idea, or principal concept, the shepherd–teacher intends to convey to the hearer.	9
Manuscript	The shepherd–teacher prepares a manuscript for sermon delivery.	2
Outlines	The shepherd–teacher outlines the biblical passage in an effort to discern the primary teaching content.	7
Visual/video reference	Visual/video reference includes the use of visual aids to convey information that is necessary to the preaching moment.	6

Code	Memo	*f*
Practical instruction	The didactic material that directs specific conduct or an approach to fulfilling a task within the life of the hearer.	46
Common experience	“Common experience” refers to the shepherd–teacher’s relation of the teaching material to the familiar experiences of the hearers, perhaps with the intent to address a specific need for learning or establish relevance of the teaching.	52
Reference	The shepherd–teacher provides a citation (e.g., name or title) of an additional learning resource with which to further explore the topic at hand in the preaching moment.	93
Question	The use of questions, both rhetorical and actual, to engage the hearers in the content of the preaching moment.	23
Illustration	An illustration is a story, anecdote, or narrative that demonstrates or emphasizes the point of the speaker for the audience.	33