10th International Conference on
TRANSFORMATIVE LEARNING
November 1-4, 2012, San Francisco, California

A FUTURE FOR EARTH:
RE-IMAGINING LEARNING FOR A TRANSFORMING WORLD

CONFERENCE PROCEEDINGS

MERIDIAN UNIVERSITY
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**A Future for Earth: Re-imagining Learning for a
Transforming World**

**The Proceedings of the 10th International Conference on
Transformative Learning**

November 1-4, 2012

San Francisco, CA

Hosted by

**Center for Transformative Learning
Meridian University**

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ITHAKA

When you set out for Ithaka
ask that your way be long,
full of adventure, full of instruction.
The Laistrygonians and the Cyclops,
angry Poseidon - do not fear them:
such as these you will never find
as long as your thought is lofty, as long as a rare
emotion touch your spirit and your body.
The Laistrygonians and the Cyclops,
angry Poseidon - you will not meet them
unless you carry them in your soul,
unless your soul raise them up before you.

Ask that your way be long.
At many a Summer dawn to enter
with what gratitude, what joy -
ports seen for the first time;
to stop at Phoenician trading centres,
and to buy good merchandise,
mother of pearl and coral, amber and ebony,
and sensuous perfumes of every kind,
sensuous perfumes as lavishly as you can;
to visit many Egyptian cities,
to gather stores of knowledge from the learned.

Have Ithaka always in your mind.
Your arrival there is what you are destined for.
But don't in the least hurry the journey.
Better it last for years,
so that when you reach the island you are old,
rich with all you have gained on the way,
not expecting Ithaka to give you wealth.
Ithaka gave you a splendid journey.
Without her you would not have set out.
She hasn't anything else to give you.

And if you find her poor, Ithaka hasn't deceived you.
So wise you have become, of such experience,
that already you'll have understood what these Ithakas mean.

Constantine P. Cavafy

An Invitation to the Proceedings of the 10th International Conference on Transformative Learning

These Proceedings from the 10th International Conference on Transformative Learning represent a rich array of the ideas, reflections, theories, and practices that enriched the conference over a span of four days. For ease of reference, the Proceedings have been arranged in alphabetical order. However, to see the overall context of where each session was offered in time, you may wish to review the Conference Schedule, included here.

Many colleagues contributed in numerous ways to the Conference as well as to the virtual *Conversation Series on Transformative Learning*, which preceded the Conference (in the spring of 2012). Panels for this Conversation Series were moderated by Eleanor Criswell, John Dirkx, Christine Jarvis, Elizabeth Kasl, Alexis Kokkos, Randee Lawrence, Victoria Marsick, Jason Meek, Edmund O'Sullivan, and Marti Spiegelman. These conversations, preserved as audio files, can be found on the Meridian University's website.

The Conference was envisioned as an opportunity to expand the current transformative learning discourse by including the praxis of transformative learning in multiple domains and multiple levels of practice. The *Call for Proposals* stated:

> *We envision the upcoming Tenth International Conference on Transformative Learning as an opportunity to create a more coherent and dynamic praxis for transformative learning in multiple domains and at multiple levels; praxis weaves together theory and practice, action and reflection.*
>
> *We will gather to articulate a more inclusive and clear vision of what we already know, and to explore what we can discover together, about the role of transformative learning in creating a just and sustainable future.*

With the aspiration that the Conference might evoke shifts in participants' own perspectives on Transformative Learning, the *Call for Proposals* posed the following:

> *The Conference aspires to itself be an inquiry, a living model of what we seek to study, promote, and celebrate. How can we create a conference process that enables the conference itself to be an embodiment of wise transformative learning praxis?"*

Participatory Plenaries
The Conference was structured around several *Participatory Plenaries*, which were intended as opportunities for significant participation and interaction between panelists and conference participants.

These plenaries opened with talks by presenters, which were then followed by the invitation for attendees to actively draw on their experience of what had been evoked for them through these opening talks. Robert Horn (World Business Council for Sustainable Development) addressed the relationship between sustainability and our planet's future relative to 40 "must haves," identified as necessities prior to the year 2050. Other such evocative presentations included Martin Luther King's "I have a dream" speech, and Alexis Kokkos, (professor of Adult Education at Hellenic Open University), who read the Greek poem *Ithaka*. Each plenary then

offered the opportunity for all participants to express their experience and views through an Open Mike, which was a space for the *commons* - an open space for all participants to express how they were affected by the presentations.

Panel conversations explored such questions as:
- What *don't* we know about the role of Transformative Learning in creating a just and sustainable future?
- What *do* we know about the role of Transformative in creating a just and sustainable future?
- What facilitates Transformative Learning?
- What are the barriers to Transformative Learning?

Plenary panelists included: Elizabeth Kasl, Ramona Sharpe, Linden West, Terri O'Fallon, Ed Taylor. Dorothy Ettling, Knud Illeris, Elizabeth Lange, Libby Tisdell, Akilah Martin, Steve Schapiro, Ilene Wasserman, Lyle Yorks, Linden West, Jason Meek, and Placido Gallegos.

During the integration work of the group's explorations, participants were encouraged to meet, confer, and network with others who shared their experience and interests. During the conference the plenary space was continually set up with tables so that special interest groups could form. Each table was numbered, corresponding to the specific domain of praxis drawn from the *Call for Proposals*:

1. Education, K-12
2. Spiritual Practice
3. The Arts
4. Civil Society
5. Law & Governance
6. Psychotherapy
7. Health Care
8. Business
9. Organizations
10. Higher Education

After speakers addressed the group, participants were invited to choose a domain where they would then be joined by others with this same domain interest. The plenaries were designed to promote the "emergence" of collective intelligence and wisdom.

On Saturday, the group danced to the oldest known dance in Western Civilization, *Enos Mythos*, while on our last morning together, the group ended by engaging in a circle where each person was invited to briefly express their hope and vision for the role Transformative Learning can play in creating a just and sustainable future.

Wishing you deep engagement with the rich and diverse collection of papers in these proceedings.

Melissa Schwartz, Ph.D.
Director, Center for Transformative Learning
Vice President of Academic Affairs
Meridian University

SCHEDULE AT A GLANCE

Thursday, November 1, 2012 (Schedule at a Glance)

Time	Event
5:00 p.m.	Registration opens
6:30 p.m.	Refreshments
8:00 - 10:00 p.m.	Participatory Plenary

Friday, November 2, 2012 (Schedule at a Glance)

Start - End: 8:30-9:30 a.m.

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Boardroom IV	Boardroom III	Harbour B	Sandpebble D
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9:30-9:45 a.m. — 15 minute break

9:45-10:45 a.m.

Regency A	Sandpebble E	Harbour B	Harbour A	Boardroom IV	Sandpebble D
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Regency C	Conference Room 8052	Regency B	Boardroom II	Boardroom III
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SCHEDULE AT A GLANCE

Friday, November 2, 2012 (Schedule at a Glance)

Time	Event
10:45-11:00 a.m.	15 minute break
11:00 am-1:00 p.m.	Participatory Plenary
1:00-2:30 p.m.	Lunch Break
3:30-3:45 p.m.	15 minute break
4:45-5:00 p.m.	15 minute break

2:30-3:30 p.m.

Room	Session
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Sandpebble D	54 - The Making of Wisdom: Journeying through the Transformative Fire of Immigration to Living in the 'Third Space' — Lange
Regency B	109 - Transformative Learning in Higher Education: Epistemological Crossroads — Herbers & Ettling
Harbour A	91 - Collaborative Inquiry and Transitions in Urban Ministry: Creating Time and Space for Reflexive Praxis in Community — Wong
Boardroom IV	140 - Silenced Voices That Cry In the Night: Transformative Learning and Spouses of Wounded Warriors — Brown
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Boardroom II	32 - Transforming Equity: At Home in a Multi-Faceted World — Hovey-Ritter
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Boardroom III	36 - Integral Intelligence: Transforming Leaders to Meet the Demands of a Complex World — Stoneham
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Room	Session
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Boardroom IV	97 - How an Action Learning Group Can Contribute to Leadership Development and the Participants' Experience of Transformative Learning — Kueht
Harbour B	55 - Towards an Integrated Research Framework for Transformative Learning Theory — Hoggan
Harbour B	27 - Life Writing through Different Point of View Perspectives — Wimmer

SCHEDULE AT A GLANCE

Friday, November 2, 2012 (Schedule at a Glance)

Time	Sandpebble E	Harbour B	Boardroom IV	Regency C	Boardroom III
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Time	Regency B	Boardroom II	Regency A	Sandpebble D	Harbour A
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Time	
6:00-8:00 p.m.	Dinner Break
8:00-10:00 p.m.	Participatory Plenary

SCHEDULE AT A GLANCE

Saturday, November 3, 2012 (Schedule at a Glance)

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Regency B	Boardroom II	Regency A	Conference Room 8052	
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9:30–9:45 a.m.

15 minute break

9:45–10:45 a.m.

Regency A	Harbour A	Harbour B	Boardroom III	Regency B
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Boardroom II	Conference Room 8052	Boardroom IV	Regency C	
64 - Extending Group Sensemaking: Practices for Engaging Expansive Group Experiences **Kelley**	23 - The Power of Praxis: Transforming Pedagogies and Practices in Graduate Leadership Education **Mankey & Stoneham**	154 - Transformative Learning through Intercultural Dialogue **McEwen & Romkema**	134 - Collaborative Developmental Action Inquiry: A Method for Envisioning the Future of Adult Learning Graduate Programs **Davis, Dzubinski, Hentz, Nicolaides**	

10:45–11:00 a.m.

15 minute break

11:00 am–1:00 p.m.

Participatory Plenary

1:00–2:30 p.m.

Lunch Break

2:30–3:30 p.m.

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135 - Learning about Race through Innovative Praxis – Theoretical and Practical Lessons for Today **Moll**	167 - Systemic Constellations and the Topology of Family Karma **Buchheit**	130 - Journey Into the Nature of Fear Through Collaborative Inquiry **Boltic, Fjellstedt, Jones, Schonour, Matthews**	24 - Learning Along the Road of Motherhood: Exploring the Potential of Transformative Learning in Doctoral Student Mothers **Tiu-Wu**	

SCHEDULE AT A GLANCE

Saturday, November 3, 2012 (Schedule at a Glance)

3:30-3:45 p.m. — 15 minute break

3:45-4:45 p.m.

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Boardroom II	Conference Room 8052	Regency B	Harbour B
148 - The Hero's Journey as a Metaphor for Personal Transformation — Willians	7 - How Stories Can Transform Whites Working for Racial Justice — Boyd	33 - Re-Imagining Learning by Engaging Local and Global Diversity: Building Our Capacity for Relational Eloquence — Wasserman & Gallegos	69 - Transformational Learning for Health and Healing: A Holistic Perspective — Sathe, Marinelli, Dahlem, Geisler

4:45-5:00 p.m. — 15 minute break

5:00-6:00 p.m.

Regency A	Harbour A	Boardroom III	Conference Room 8052	Regency B
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Boardroom II	Boardroom IV	Regency C	Harbour B
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6:00-8:00 p.m. — Dinner Break

8:00-10:00 p.m. — Participatory Plenary

SCHEDULE AT A GLANCE

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9:30-9:45 a.m.	15 minute break				
	Boardroom IV	Regency B	Harbour A	Harbour B	Regency A
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	Conference Room 8052	Boardroom III	Regency C	Boardroom II	Boardroom I
	63 - Walking Between Worlds: Holding Multiple Worldviews as a Key for Ecological Transformation — Canty	126 - Social Work in Gypsies Urban Ghetto: Failure and Transformation through the Narrations of Social Workers — Persico	15 - Setting the Stage for Transformative Learning: The Women Professors of Adult Education Retreat Experience — Lawrence, McGill, Caffarella, Tisdell, Wolf	28 - The Emotion of Shame: A Mechanism of Self-Protection — Wimmer	168 - Domains, Levels, and Approaches: Exploring the Diversity within Transformative Learning Praxis — Omer, Schwartz, Lubell, Gall
10:45-11:00 a.m.	15 minute break				
11:00 am-1:00 p.m.	Participatory Plenary				

LIST OF PAPERS

A Creative Approach to Learning from a Transformative Experience

Sabine Amend and Beatrice Benne

Abstract

The combined theoretical lenses of the two authors form the foundation for a workshop design on creative approaches to learning from a transformative experience. Perspectives on emergent creative process, living systems and complexity theories, post-Cartesian views of the human being, as well as the roles of community, play, trauma, and resilience are explored in their implications for designing transformative learning approaches.

I. Introduction

How can we weave further insight about transformative learning from our own transformative experiences? How can a creative process further transform a prior transformative experience? And how does this change the ways in which we act in our social and natural environments? These are the questions at the core of the proposed workshop.

Participants are invited to engage in a process of inquiry into these questions, which will take a personal transformative experience as a starting point for exploration. Building on insights derived from individual reflection, the session moves into a collaborative stage of sharing in small groups, and subsequent creation of artistic expressions of the shared perspectives. In a final reflection stage, insights from the process will be harvested and documented.

The co-facilitators converged on the workshop design with a background that covers multiple disciplines. These disciplines include Chinese studies and intercultural communication, systems thinking, complexity sciences, living systems theory, cognitive science, change management, leadership development, somatic education, and the fields of adults' and organizations' learning. In the following sections, each facilitator articulates her theoretical lenses through which she has approached the workshop design.

II. Lens 1 (Beatrice Benne): Transformative Learning as an Emergent Creative Process

Benne's research is transdisciplinary and grounded in the fields of second generation cognitive science of the 'embodied mind' (Lakoff and Johnson, 1999; Varela et al. 1993); complexity sciences and living systems theory — in particular, the study of complex adaptive systems' and living systems' adaptation to change in their environments (Langton, 1989, 1992; Kauffman, 1993, 1995; Harman & Sahtouris, 1998; Miller & Page, 2007), and the autopoeitic theory, which is the theory of self-creation in living systems (Maturana and Varela, 1980, 1997; Luhmann, 1990); and organizational theory with a focus on organizational learning and change (Senge, 1990; Wheatley, 1992; Stacey, 1996). These theories provide a rich ground to explore transformative learning in individuals as well as in social systems. Benne's work is also informed by the understanding of the nature of creativity and of the creative process (Ehrenzweig, 1967; Bohm, 1998).

Transformative Learning: The Pattern of Life

Benne's defines 'transformative learning' as any irreversible (emergent) process of sufficiently deep creative change in the mental structure and consciousness of any living system. Such a change alters the living system's perception of reality and, impacts its actions and behavior in its environment. So described, transformative learning is an evolutionary process and the fundamental pattern of all life pervading the entire creative Universe. It is life as 'becoming being,' i.e., an on-going process of creative emergence through which we become who we are: whole and connected to everything that is.

Within the context of transformative learning as defined above, Benne believes that, to learn, to create, and to transform are, if not synonymous processes, at least completely intertwined to the extent that neither of them can

exist without the other two[1].   In this essay, the three words will be used interchangeably.

Exploring Experience from an Embodied Mind's Perspective

In contrast to the traditional Western philosophical traditions that emphasize Descartes' mind-body dichotomy, Benne embraces the perspective of an "embodied mind," that is, the idea that cognition is a biological phenomenon (Bateson, 1973, 1980; Maturana and Varela, 1980; Varela et al. 1993; Lakoff and Johnson, 1999). From this perspective, cognition "is not a representation of an independently existing world, but rather a continual bringing forth of a world through the process of living" (Capra, 2002, p. 36). This implies that any study of the mind and consciousness needs to incorporate the whole body experience in its field of investigation.

Hence, in the first part of the workshop, we ask participants to become 'reflective scientists' — kind of 'reflective practitioners' (Schön, 1983) — and to not only reflect *on* their transformative learning experience, but to also acknowledge that their reflection *is* a form of experience (Varela et al., 1993). As they bring their awareness to their immediate present experience, participants should notice any feelings, sensations, and emotions that arise. In doing so, they might be able to live again aspects of their past experiences to some extent, which might be sources of insights about the nature of their transformative process.

The Perspective of Complexity Sciences and Living Systems Theory

Stacey (1996) shows the self-similar nature of the creative process in the mind, groups, and organizations — each of these being a complex adaptive system with self-organizing and emergent capacities. When the internal conditions of the system are favorable, learning, creativity, and emergence in a complex adaptive system occur at the edge of chaos, a paradoxical state of simultaneous stability and instability away from dynamic equilibrium (Langton, 1989; Langton et al., 1992). In this state, the components of the system self-organize spontaneously, without any blueprint, to create more ordered structures and patterns. For humans, change in the pattern of symbols in the mind is equivalent to creativity and double-loop learning (Argyris and Schön, 1974), i.e., the emergence of new mental model, insights, and creative ideas — all sources and generative of new behaviors that ultimately increase individual or group fitness (Stacey, 1996).

Autopoietic theory (Maturana and Varela, 1980, 1997) adds further insights into the transformative learning process with the principle of "conservation through change," which implies that autopoietic systems are able to spontaneously change their structure in order to adapt and evolve while maintaining their overall organization and identity.

Autopoietic systems are structure-determined: their behavior is determined by their own structure as opposed to by external forces. These systems are functionally open, i.e., they exchange information, resources and energy with their environment, but operationally closed, i.e., they select which environmental perturbations to notice and consequently create information and assigns meaning to it. This implies that autopoietic systems are both determined and free: they are determined by their own structure, but they maintain the freedom to define which perturbations from the environment will trigger their internal change and adaptation.

Changes in a living system occur through structural coupling: the process of inter-systemic coordination (when two or more systems coordinate their activities) and to the process of co-evolution (when a system adapts to change in its environment). The history of structural changes undergone by a system represents its history and differentiates its behavior from that of the other systems of similar type.

The theories presented above trigger interesting questions for the workshop, such as: What forces influence a system to shift from a dynamic equilibrium state to the edge of chaos? How did participants experience the edge

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[1] This idea was inspired by the writing of Adriaan Michiel de Lange (1945-), a South African chemist physicist and transdisciplinary scientist, who studies how thermodynamics, the base of modern complexity studies, applies to the humanities — more specifically, he suggests that entropy production must apply to the metaphysical world as well as to the process of physically knowing and learning. In the late 1990s, de Lange began sharing his theories at the learning-org.com forum.

of chaos state? How does individual choice influence their learning journey? How are the notions of freedom and determinism perceived by the workshop participants, as they recall their transformative learning experiences? What personal limitations or roadblocks did they face throughout the process, considering their past history, personal beliefs and mental models?

Irreversible Emergent Learning Process

Autopoietic systems behave like dissipative structures in that they defy the second law of thermodynamic: such systems dissipate entropy to their environment while increasing their internal level of organization by creating ordered structures and patterns (Prigogine, 1977).   This process is irreversible.

Similarly, authentic transformative learning is an irreversible process in the mind and consciousness: as humans go through their individual developmental process and develop higher level of consciousness, their perception of reality is altered in such a way that it can never be the same as it was prior to the transformative experience.

The Creative Process as a Transformative Tool

Analytical, linear ways of thinking are not the only approaches to the development of knowledge and, when aimed at a creative endeavor, they may, in fact, inhibit the unconscious and recursive processes upon which all creative activity and science depend (Bateson, 1973, 1980; Bohm, 1998; Ehrenzweig, 1967). Bohm (1992) expressed the idea that all learning occurs in a state of "not knowing." The challenge in a transformative experience is to find ways to interrupt the on-going flow of thoughts whose rigidity have the tendency to fragment and restrict the possible domain of inquiry and, instead, open up to other sources of knowing that are more fluid such as intuition, imagination, and primary knowing. Artistic activities and experiences with nature are wonderful tools to help us reconnect to our bodily senses (Senge et al., 2004; Scharmer, 2007), increase our level of awareness of the present moment, awaken the creative unconscious mind, and reconnect mind, body and heart so that one is able to perceive reality with 'new eyes' — an idea eloquently captured by Marcel Proust when he exclaimed: "The real voyage of discovery consists not in seeking new landscapes, but in having new eyes."

As we become more present and open to new insights, our connection with the world becomes more whole: we might witness a 'creative collapse,' that is, the collapse of the boundary between the 'Self' (i.e., the observer) and the 'Object' being observed — what Martin Buber (1878-1965) referred to as a "I-thou" relationship. This outcome is the purpose of Presencing technology (Senge et al., 2004) and what, in theory, should occur, at the bottom of the U in Theory-U (Scharmer, 2007). It is in such moments of intense aesthetic quality that our consciousness becomes one with all that is: a deep transformative experience.

In the final section of the workshop we ask participants to express their collective insights through an original artistic expression. It is hoped that through the creative process and by being performers of their own transformative experience (i.e., a kind of recursive process) new insights and learning will emerge collectively, that reinforce the individual experience.

III. Lens 2 (Sabine Amend): The Human Being, Finely-Tuned for Life

Whole Humans, Actively Coping

Amend's thinking is informed by a post-Cartesian, holistic perspective which views as paradigmatic the deep interconnectedness of conscious thinking, sensory-motor processing, emotional process, learning, action, and overall function of the human being as a whole system with self-regulating and adaptive capabilities, as it interacts with its environments. Theorists underpinning this viewpoint include Bartenieff (2002), Damasio (1994, 2000, and 2012), Hanna (1988), Hannaford (2005), as well as brain research and neuroscience (summary in Carter, 2009).

Since transformative experiences are not necessarily joyous or easy, and can tax the coping capacities of a person to a very high degree, Amend finds that it is helpful to include thinking on trauma, with its effects and learning potential, when working with individuals and groups on experiences of transformative learning. The writings of Levine (1997 and 2010), with their integrated somatic perspective on trauma as both a biological and a psychological event, and the brain as a layered and multi-voiced entity in negotiations with itself, fundamentally inform her views in this field.

Amend's approach is also guided by a resource-oriented view towards human development, in which self-organization and neuroplasticity, individuation, meaning, choice, coherence and resilience play a central role. The interested reader will find the works of Antonovsky (1987/1997), Rogers (1951, 1969), Perls (e.g. 1977), and Rock and Page (2009) a relevant starting place.

Movement, Play and Creative Expression

When working with play, movement-based activities or creative levels of expression, Amend views this methodological choice through the lens of developmental resourcing for the whole person (and the group) by creating safe and "time out of time" spaces, which invite experimentation with new possibilities.

Embodied, somatically-focused activities often involve tapping into developmental movement patterns, which are established (and frequently not healthily completed) in the first five years of a person's life. New movement experiences, particularly those in the realm of childhood developmental patterns hold the potential for "catching up" on prior phases or steps in human development, which can result in profound positive shifts for the whole human being. This, in itself, is transformational learning (e.g. Bainbridge-Cohen, 2008).

More broadly speaking, increasing one's awareness of movement habits and patterns can unlock expressive potential, bring access to new action resources, and provide significant personal insight into emotional and relational material, as well as into group dynamics. These are doorways into new awareness and choice, including meaning-making from transformative experience, and taking more well-adapted courses of action in every-day life (e.g. Laban 2011; Moore and Yamamoto, 2012; Halprin, 2003).

Playful and expressive activities, by themselves, hold a tremendous potential for discovery, be it through one's own actions or interactions, through witnessing those of others, and through reflecting on these experiences — not least because they open the realm of "make-belief", stimulating the imagination, and permitting room for aspects of ourselves that don't usually get voice in our "normal" functioning (e.g. Brown, 2010, Halprin, 2003, Winton-Henry, 2004).

Community and Storytelling

Playback Theater informs Amend's understanding of story and storytelling, in that in telling, performing, and witnessing, story becomes changed, and changed stories can transform both the teller of the story and the listeners/witnesses (see e.g. Salas, 1993; Fox, 1994). Circle-based methodologies of speaking, such as circle-based facilitation, or restorative justice circles, exhibit similar dynamics of potentially transformative storytelling, involving what can be viewed as "performative acts," which are embedded in community interaction and witnessing (Baldwin and Linnea, 2010; Title, 2011). It is for this reason that the workshop design includes storytelling and performative elements, community, and witnessing, so that they become available to further transform a transformative experience.

Meaning-making through language, symbols and social interaction can also be viewed through the theoretical lens of constructionist theory, which "locates the source of meaning, value and action in the relational connection among people" and posits that "through relational processes we create the world in which we most want to live and work" (Gergen, K., see Taos Institute www.taosinstute.org). Particularly the latter quote expresses an important facilitator-stance for the workshop.

Future for Earth

Finally, Amend considers our capacity for awakeness to the embodied, living-self essential for our ability to connect not just to other human beings but, also, to all sentient beings. In that regard, our deep, embodied connection with self is an essential resource for treasuring and creating a bio-friendly, truly sustainable, future for earth: Through our sense-full compassion, we can find pathways to action.

IV. Practice and Workshop Description

Session Weaving: Theory and Practice, Action and Reflection

The participants bring their own individual insights from a prior transformative experience into the room (using stories, metaphors, analogies, etc. so that to respect privacy), in order to ground the session in each person's prior actions and practice. As a first step, participants are asked to reflect individually on the characteristics of one important transformational experience. Next, the reflection process is further deepened through a small-group

sharing of the characteristics of individual transformative experiences. It is expected that the insights from this reflective activity broadly mirror the current theoretical perspectives, as well as deepen the participants' understanding of the key characteristics of a transformative experience. By combining the "private" experience with social interaction, it is expected that both the individual and the universal elements of transformative experience become better understood (and potentially available for theorizing and action).

Then the session shifts into action: Through an artistic expression — be it a skit, a dance, a sculpture, some object, collage, painting or whatever else — the small groups creatively express their collective insights on the characteristics of transformative experience. This creative action itself involves elements of sharing, agency and further reflection, as well as space for further learning and transformative experience.

The presentation/performance phase combines action on the part of the "performers" and reflection on the part of the "audience". All participants will have an experience of being "performers" and "audience" in this process.

The harvesting round will be a reflection on the learning based on the session experience. Particular emphasis will be placed on exploring how this learning can inform and alter the ways in which the participants take action in the context of their respective life and work environments.

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Further reading on Playback Theater can be found at: http://www.playbacktheatre.org/resources/articles-and-books

Learning Through Adaptive Challenges: Increasing Capabilities for Early Career Professionals

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Abstract

The transition from being a student to a professional can involve a steep learning curve. For doctoral graduates who enroll in a Centers for Disease Control and Prevention applied fellowship program, a major challenge can be learning public health practice while adapting to an applied, multidisciplinary, multiprofessional, and service-oriented work culture. The challenges that fellows might experience during this transition require further exploration. We used a Collaborative Developmental Action Inquiry (CDAI) approach to explore the challenges faced by a group of postdoctoral quantitative policy fellows as they transition to an applied service-oriented fellowship program. Findings indicate that this group of fellows experienced adaptive challenges related to collaborating across disciplines and interpersonal dynamics in the supervisor–mentor—mentee relationship. In the CDAI context, fellows learned to navigate through challenges (e.g., reframing their perspectives, observing the dynamics of their new work culture, and inquiring and engaging with others on the basis of a common understanding of the work).

Learning Through Adaptive Challenges: Increasing Capabilities for Early Career Professionals

Transitioning to a new work culture can be challenging. In particular, the transition into an applied postdoctoral program involving multiple disciplines and professions can be difficult because it involves simultaneously learning a new discipline and providing service in an unfamiliar work culture.

We share observations of an exploration that sought to understand the types of adaptive challenges that scientific fellows in an applied postdoctoral program face. Additionally, we wanted to understand how to foster learning types that support scientific fellows in meeting adaptive challenges in timely, skillful, and effective ways. This paper focuses specifically on one of the learning interventions that helped to increase awareness of adaptive challenges among the fellows and the ways in which they met those challenges. What we learned is that, in the context of the Collaborative Developmental Action Inquiry (CDAI) method, these scientific fellows are able to try new ways of approaching complex adaptive challenges by observing each other's behavior, inquiring into their frames of reference and how they interpret the challenges they face, and how they engage with such challenges to create effective pathways for change.

Context

Our project was conducted with participants of the Centers for Disease Control and Prevention's (CDC) Steven M. Teutsch Prevention Effectiveness (PE) Fellowship Program (http://www.cdc.gov/pef/), a 2-year scientific fellowship program established in 1995 to address an ongoing demand for quantitative policy analysis in public health. The Fellowship Program addresses this demand by recruiting economists, decision scientists, health services researchers, industrial engineers, operations researchers, and other scientists with similar backgrounds. Fellows are placed in training assignments at CDC headquarters in Atlanta, Georgia, where they are expected to work collaboratively in assessing the impact of public health policies, programs, and practices by determining their effectiveness, quality, and cost-effectiveness. Each fellow is assigned a supervisor and a mentor who are both responsible for creating the conditions for the fellow to learn and contribute to CDC's mission. The supervisor is responsible for assigning the day-to-day work and providing work oversight. The mentor engages in a nonsupervisory role and is typically a health economist who can offer methodologic guidance in health economics.

Theoretical Framework

This project is based on theoretical perspectives from (1) complexity theory, (2) transformative learning theory, and (3) adult learning. The transition to a new work context not only involves applying known skills in an unknown context but also continually adapting to increasingly complex and changing situations. Developing the capability to problem solve in complex situations is facilitated by "the use of non-linear learning approaches such as storytelling and small group, problem based learning" (Fraser & Greenhalgh, 2001, p. 799). Case-based learning is an example of a nonlinear learning approach and is an effective methodology for problem solving in complex situations (Drago-Severson, 2009; Foster & Carboni, 2009; Fraser & Greenhalgh, 2001; Heifetz, Grashow, & Linsky, 2009; Torbert, 2004; Yorks, 2005). Case-based learning "occurs in a group and is a structured opportunity (i.e., with a protocol) to join with colleagues and engage with a case based on one's own experience . . ." (Drago-Severson, 2009, p. 200). Case-based learning can uncover the complexity of a challenge when transitioning to a new work setting. Such learning approaches help to create the conditions for transformative learning to occur.

The challenges that are prevalent in such applied fields as public health are adaptive challenges instead of solely technical challenges (Koh, 2009; Uhl-Bien, Marion, & McKelvey, 2007). Adaptive challenges are "problems that require new learning, innovation, and new patterns of behavior. They are different from technical problems, which can be solved with knowledge and procedures already in hand" (Uhl-Bien, et al., 2007, p. 300). The notion of adaptive challenge, as conceptualized by Ronald Heifetz and colleagues (2009), can further help elucidate the problems that professionals can encounter when transitioning to a new work culture. Although many types of adaptive challenges exist, four basic patterns or archetypes emerge (Heifetz et al., 2009): (1) a gap between espoused values and behavior, (2) competing commitments, (3) speaking the unspeakable, and (4) work avoidance. Adaptive challenges require learning that includes unlearning, and transforming

undergirding habits of making meaning and choices of action that align with the complexities faced by these transitioning scientific fellows.

Methods

This is an exploration using CDAI (Torbert, 2004) for inquiring and understanding the types of adaptive challenges that scientific fellows face in their transition to CDC. CDAI is a learning practice where participants engage in reflection and inquiry in a collaborative manner so that learning occurs from individual and shared experiences. CDAI emphasizes first person (inquiry into our own actions in the world), second person (inquiry into our action with others), and third person inquiry (inquiry into how our collective actions impact the larger organization) (Torbert, 2004). Within CDAI, different learning methods can be used. This paper focuses on findings from case-based learning method, one of several inquiry methods used in this exploration.

To accomplish our goals, we formed two groups: the supervisor group (consisting of nine supervisors and mentors) and the fellow group (consisting of six quantitative policy fellows). Information about initial descriptions of the quality of their work challenges was generated through case-based learning with the fellows.

All members of the fellow group were asked to select and write about a case based on a real-life work challenge they had experienced within 6 months of their transition to working in an applied setting. Each fellow received a protocol for writing their case study and instructions for presenting their case study to the trainee group. We convened the fellow group and facilitated the case presentations. These presentations were recorded with the fellows' permission and later transcribed. Data analysis involved systematically coding and categorizing the transcribed data by using the step-by-step process outlined by Ruona (2005) and based on the constant comparative method. The constant comparative method "involves comparing one segment of data with another to determine similarities and differences" (Merriam, 2009, p. 30), then grouping the data by similar dimensions. Data were displayed by using case study analysis and presentation methods outlined by Yin (2009).

Findings

The table provides an overview of the challenges and adaptive learning and summarizes key themes of the six cases to illustrate the emerging findings from the case-based learning method. The adaptive challenge and problem statement columns in the table refer to the challenges that the scientific fellows described during their case presentations. The case-based learning column refers to statements of learning that were expressed in the context of the CDAI group sessions with the fellows. The summary of learning column refers to an inductive label to categorize the learning in the case-based learning column. Column 1 demonstrates that three of the six adaptive challenges were related to collaborating with stakeholders, and the remaining three related to interpersonal dynamics between the fellow and the supervisor or mentor.

Table: Adaptive Challenges and Learning Generated Through Case-Based Learning

Adaptive challenge	Problem statement	Case-based learning	Summary of learning
1. Collaborating in a new discipline	How to collaborate in a discipline where the fellow is inexperienced?	• Observe to gain insight into how stakeholders respond to a new idea • Take a systems view to look at what stakeholders need • Gently bring up the idea again, clarify intention through inquiry; reframe idea • Leverage social capital	Reframe approach from selling idea harder to asking about mutual needs
2. Collaborating under limited authority role	How to collaborate with external coauthors where the fellow has no authority over those coauthors?	• Create incentives for coauthors • Communicate for team building; communicate status of project and offer solutions when project is lagging • Inquire into what others need to be able to act • Ask for help from those who have positional power (e.g., engage supervisor)	Reframe from doing all the work on your own to engaging others on the basis of what they need
3. Collaborating under dynamics of role distinction	How to distinguish project roles in changing projects	• Clarify role through inquiry; offer feedback • Interrupt pattern of role confusion through a conversation to reframe • Be transparent about roles • Engage colleague by structuring agenda and assigning roles	Reframe project roles for collaborative engagement
4. Interpersonal dynamics with supervisor under changing projects	How to manage the interpersonal dynamics with supervisor under different projects with different stakeholders?	• Interrupt pattern of ineffective communication through inquiry • Move beyond comfort zone and recognize that change is painful • Recognize supervisors' needs	Reframe conversations to inquire into supervisors' needs
5. Interpersonal al	How to work with a supervisor and	• Value of multiple perspectives; split project into two elements to	Reframe project for mutual benefit

Adaptive challenge	Problem statement	Case-based learning	Summary of learning
dynamics with supervisor and mentor with differing perspectives	mentor who recommend different approaches for completing a project?	satisfy each stakeholder • Ask for feedback in the moment • Advocate and inquire	
6. Interpersonal dynamics with supervisor on long- and short-term projects	How to make progress on long-term projects while managing short-term requests for assistance?	• Understand the value of short-term requests to the organization • Use short-term requests as a platform for adding value on a more long-term basis	Reframe short-term requests for long-term benefit to the organization

The case-based learning method illustrates some of the types of adaptive challenges that the fellows faced and the types of learning and adaptations they used to meet those challenges. Each of the case-based learning dialogues offered opportunities for the fellow to consider revisions or reframes regarding how they were interpreting and taking action in the midst of their adaptive challenge.

Challenge 1: Collaborating in a New Discipline

This adaptive challenge refers to how to collaborate in a discipline where the fellow is inexperienced. Initially, the fellow's strategy was to "sell the idea harder" (group communication, January 19, 2012). Through the case inquiry session, the fellow received feedback on ways the fellow could approach the situation, including shifting from trying to sell the idea harder to asking about colleagues' interests or asking about mutual needs.

Challenge 2: Collaborating Under Limited Authority Role

This adaptive challenge refers to how to lead a manuscript publication project with external collaborators. Initially, the fellow's strategy was to attempt to complete the work himself. By the end of the case inquiry session, the fellow learned approaches for creating incentives to increase collaboration and timeliness of task completion. The fellow also learned how important communicating regularly with team members and the supervisor is, especially when project milestones are not being met. The fellow also learned to provide recommendations for improving the situation.

Challenge 3: Collaborating Under Dynamics of Role Distinction

This adaptive challenge refers to how to distinguish project roles on changing projects. The case-based learning session offered the fellow different approaches for clarifying role boundaries with colleagues while still engaging in a collaborative manner.

Challenge 4: Interpersonal Dynamics with Supervisor Under Changing Projects
This adaptive challenge refers to how to work under conditions of intense work oversight as a result of the project's visibility. The fellow learned to reframe her communication to inquire into what the supervisor's needs were. Additionally, an "Aha!" moment occurred when the fellow recognized that the hardships in learning how to communicate with the supervisor were part of the natural process of change that can be painful at times.

Challenge 5: Interpersonal Dynamics with Supervisor and Mentor with Differing Perspectives
This adaptive challenge refers to how to manage the dynamics of the supervisor and mentor who do not agree and who influence the projects on which the fellow works. In this instance, the fellow received feedback from peers and facilitators on how to generate projects that all could agree on. Additionally, the fellow learned how to ask for feedback and advocate without aggression by using a communication tool, the four parts of speech for communicating in difficult situations (Torbert, 2004)

Challenge 6: Interpersonal Dynamics with Supervisor on Long- and Short-Term Projects
This adaptive challenge refers to how to balance short-term requests for economics assistance with progress on longer-term projects (e.g., publications). The fellow received advice on how to reframe the way the fellow was reacting to short-term requests, which might be a signal of a deeper organizational need. Addressing that need could lead to a beneficial longer-term project.

Through case-based learning, fellows learned new ways to navigate through their adaptive challenges (e.g., reframing their perspectives, observing the dynamics of their new work culture, and inquiring and engaging with others on the basis of a common understanding of the work).

Discussion

Case-based inquiry is an effective approach for raising awareness and generating learning to navigate through the adaptive challenges fellows face when transitioning to an applied, multidisciplinary work culture. A summary of the adaptive challenge descriptions was shared with the supervisor group for developing approaches to help current and future fellows learn and transition through the adaptive challenges related to collaboration and interpersonal dynamics with a supervisor or mentor. A key recommendation offered by the supervisor group was to implement required training for all supervisors and mentors hosting fellows focused on raising awareness of the types of adaptive challenges fellows face. By raising awareness of the types of challenges and potential for learning through the challenges, supervisors and mentors can better prepare for and support the fellow's developmental journey.

The recommended training was implemented in September 2012 for the 2012–13 class of fellows. Evaluations from the training indicated that participants benefited from the exchange and that the training might be applicable to supervisors or mentors supporting the development of any professional or fellow transitioning to the CDC. Any professional or fellow transitioning to an applied work culture, involving collaboration across disciplines and professions, might experience similar adaptive challenges. The cased-based learning

method has helped these fellows accelerate their adaption to a new work culture and transform a challenge into an adaptive strength. Additionally, the training offered to supervisors on the adaptive challenges fellows face might help supervisors recognize how best to help fellows be effective.

In this project, the case-based learning method functioned well with two facilitators: One with expertise in the case-based learning methodology and the other with internal organizational experience. This setup enabled the case-based learning dialogues to be well guided and grounded in the organizational realities the fellow face. Broader explorations conducted with other CDC applied science fellowships can provide worthwhile information regarding application of case-based learning methods in such settings.

Note: The findings and conclusions in this report are those of the author(s) and do not necessarily represent the official position of the Centers for Disease Control and Prevention.

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From "Me" to "We:" Claiming Wisdom and Our Common World

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Abstract

I am proposing that, working with my conceptualization of practical wisdom, we can utilize a transformative process to bring about change that will enhance rather than inhibit human flourishing, moving from a "me" world to more of a "we" world. An explanation of the Emergent Wisdom Model and other theories will illustrate connections to both wisdom thinking and transformative learning.

Keywords

Wisdom, practical wisdom, the commons, systems thinking, transformative learning

Introduction

Here is an example from a recent event in my city of Minneapolis (Samuels, 2012). A man was driving along one evening when he saw two men urinating against a wall. Stopping his car, he called out to them that their behavior was against the laws of the city. The men proceeded to curse him out but the older man told them that he would not call 911, and the two men ran away with big smiles on their faces. What had happened? The older man soon discovered that while he was looking at the taller man of the two, the other had stolen his cell phone. Finally, with the help of the police he tracked the phone down. With the thieves standing between police officers, the older man told them his plan—he would recount the incident and they could corroborate or offer their own version of events. Very politely with lots of "yes, sir's", they agreed with the older man's story.

He then offered another perspective: a 63-year old black man in a mostly black part of the city sees two black men breaking the law by urinating against a wall. He cautions them but they respond with threats and intimidation. He did not have a gun; he did not call 911; he was simply interacting with them as an older man to younger ones, earning no respect, however, except when they were in the custody of two white police officers. Explaining that he will give them a break, he brought out one of his business cards and told them his name: Don Samuels, a Minneapolis City Council member and the chair of the Public Safety Committee. And he gave them information on resources that are available for people like these two young men to changes their lives and not continue urinating on buildings.

This, I believe, is an example of wisdom because the older man did not resort to the usual tactics of calling 911. Instead, he took the time and had the moral courage to engage with these two younger men, showing them a different way of reacting to them and offering them strategies for ways to change their lives. Councilman Samuels knew what matters—human flourishing—and he acted on it.

This example serves two purposes. The first is to demonstrate a possible leap into the transformative journey for the two young thieves. The second provides an entrée into a discussion of wisdom thinking. As for the transformative leap, unbeknownst to him, Don Samuels could have been offering the young men a trigger event in their lives—they had been caught as thieves but were being let off—and more than that, the man from whom they had stolen the cell phone was not only an important figure in city politics, but he was also presenting them with options for a different life. Why would anyone behave that way? they might wonder. Perhaps reflecting on that question could lead them to exploration and integration as they transform their understanding of themselves and the world around them.

Second, is this an example of wisdom? Yes, because in this situation at least Mr. Samuels fulfilled my definition of wisdom: "having sufficient awareness in various situations and contexts to act in ways that enhance our common humanity" (Bassett, 2011, p. 36). (I would not venture to call Mr. Samuels wise—or not wise—because what I provide here is a single example, and the definition requires that a person act with sufficient awareness at different times and places, that is, supplying a more comprehensive portrait.) In this case he showed awareness of the whole picture and acted in ways to bring about a positive change in these young men's lives.

Theory

I discuss two theories in this paper: wisdom and transformative learning. Wisdom theory includes my own (Bassett, 2011a, 2011b) and Sternberg's of balanced interests (Sternberg, 2001). For transformative learning, I discuss briefly Mezirow (2000) and additionally Daloz's thoughts (Daloz, 2000).

What is wisdom? A model that I have developed from my grounded theory research, the Emergent Wisdom Model, shows the various dimensions of wisdom and their interaction, that is, each of the cells interacts with each of the others. See Figure 1.

Figure 1 Emergent Wisdom Model © Caroline Bassett, 2009

Wisdom is having sufficient awareness in various contexts or situations to act in ways that enhance our common humanity.

(Please note that each cell relates to, interacts with, influences, and is influenced by any and all of the others.)

WISDOM				
Dimension	**Discerning** (Cognitive)	**Respecting** (Affective)	**Engaging** (Active)	**Reflecting/ Transforming** (Reflective)
Chief Descriptor	Objectivity	Openness & Acceptance	Involvement	Integrity
Proficiency	Insight Holistic thinking, systemic seeing into complexity Balanced interests	Multiple perspective-taking Compassion & caring/empathy/love Generosity of spirit/ non-judgmental	Sound judgment & adept decision-making Actions based on fairness & justice Moral courage	Self-knowledge Self-acceptance Perspective on self as part of systems
Manifestation	Deep understanding of fundamental patterns and relationships, causes & consequences	Sense of gratitude Expanded sphere of consideration	Committed action for the common good	Embracing of paradox & uncertainty Ability to see beyond the self Growing recognition of interdependence
Queries	What are the facts? What's really going on in this situation? What's true? What's important? What's right?	Whose point of view am I taking? How does someone else understand this situation? How can I relate to them with magnanimity?	What guides my actions? To what ends are my actions directed? What means do I use? What are some consequences?	What are my values, my boundaries, my needs? What really matters most to me? Who or what is the "I" that I think I am?

Here is a homey example. My friend Margaret lives in a transitional neighborhood with noisy neighbors who play loud music many evenings of the week. One hot Saturday night in July the music could be heard all the way down the block so at Margaret's house, just next door, it was particularly intrusive. She could have called the police but that action could yield tension in the future, if not animosity. She could have telephoned them to ask them to quiet down, but they would not have heard the phone. She decided to knock on their door, which fortunately they did hear. After identifying herself as their neighbor, she asked them to turn music down, which they did do. (The next day she also bought a white noise machine for herself.) As a result of this person-to-person interaction, the whole (the relations between neighbors) works better because of a direct face-to-face encounter that avoided bringing the police into the picture.

In terms of wisdom, you could call this not wisdom at all but rather common sense. I study practical wisdom that is useful in our daily lives, and I would argue that often common sense is wise. I and others see wisdom lying on a continuum (Meeks and Jeste, 2009) ranging from small barely-noticeable actions that result in good ends for all parties in a particular situation to large scale decisions that can affect millions, such as Nelson

Mandela's to avoid a bloodbath after apartheid ended by bringing the sides together. Another example is Aung San Suu Kyi, Nobel Peace Prize winner in Burma (Myanmar) who was released from more than twenty years of house arrest and now serves in the Parliament in that country, pressing ahead with her agenda to make the country more democratic. But most of us are not leaders who operate on a national scale—we fumble through our lives like everyone else.

What is the difference, then, between a wise person and a less wise one? I would argue that the wiser person employs most or all of the proficiencies in the Emergent Wisdom Model (see figure 1). For example, the city councilman Don Samuels demonstrated insight into the system of poverty and hopelessness; he exhibited caring by engaging with the young men instead of calling the police and having them arrested for stealing his cell phone; he certainly showed moral courage in facing up to them; and his perspective on himself as part of a system allowed him as councilman to bring other parts of the system into play (using the police when needed, not pressing charges for the theft, and bringing their attention in a forceful way to community resources). (I would add that an even wiser action would have been to follow up with them a week later, asking them what changes they had made.)

Transformative Learning

How does Mr. Samuels' wise behavior relate to transformative learning? The larger question is this: what is the relationship between wisdom and transformative learning? How can a person become wiser? Do individuals have to undergo transformation to become wise or wiser?

I would argue both yes and now. For the "no" I would say that much common sense requires ordinary, usual ways of thinking addressed in a humble way to solving commonplace problems in ways that result in good outcomes for self and others. At the same time, I would say "yes" because it takes some presence of mind to be able to see outside of one's own narrow personal system, which could look like this: "Those guys are breaking the law by urinating on the wall! Those guys will go to jail for stealing my cell phone! I am going to report them." A wisdom perspective requires a person to put himself into a context in a third person kind of way: "I am seeing two young men breaking the law. These two young men stole my cell phone. Why are they doing this? What is going on?" I put myself into the picture, and I try to see the forces at work—young men breaking the law and intimidating an older man—why are they doing this? Because they do not know any better. They do not know that there is a world where your boxer shorts do not show. They do not know a way out, and they do not want to make the effort to try to find it, much less to do it—perhaps. So, what can I, as a player, do to change the picture?

Arriving at this state of mind, I would argue, requires transformation beyond our usual ways of thinking to arrive at Mezirow's famous dictum about becoming critically aware of "how and why our presuppositions have come to constrain the way we perceive, understand, and feel about our world; of reformulating these assumptions to permit a more inclusive, discriminating, permeable, and integrative perspective; and of making decisions or otherwise acting upon these new understandings" (Mezirow, 1990, p. 14). From the point of view of wisdom thinking, I would posit that achieving the ability to see beyond the self probably requires transformation from conventional, ego-centered self to a place where a person can take a larger, less personally involved view of a situation.

At the same time, while I would not go so far as to deny the existence of transformative learning as Newman (2012) does, I would tend to agree that often transformation occurs, as Daloz says, when "the change or shift was long in coming and its possibility prepared for in myriad ways, generally across years" (Daloz, 2000, p. 105). He goes on to cite Nelson Mandela: "I had no epiphany, no singular revelation, no moment of truth, but a steady accumulation of a thousand slights, a thousand indignities, a thousand unremembered moments" (Mandela as cited in Daloz, 2000, p. 106).

In terms of wisdom development, it probably occurs along these lines. There may, however, be a moment when I did something that did not turn out well for myself and that hurt another. For example, when I was in graduate school, my friend's husband engaged in a long-term affair that finally resulted in divorce. There were three young children. When Emily and I talked about it over the years, we agreed that other behaviors on her husband's part would not have hurt so many people—his wife, the children, and the other woman, with whom he did not stay. Sure, you could say, he was a jerk. Nevertheless, even for them there are better—wiser—ways of doing things.

How could John have reduced the damage? Using the Emergent Wisdom model, he could have taken a step back and outside of the situation seeing beyond himself and his own needs (Reflection). He could look at it objectively. Here is a man cheating on his wife who is left with taking care of young children. What's really going on here (Discernment)? He is destroying a family, but he doesn't really love his wife any more. What is she

feeling? What would it be like to be in her shoes (Respect)? What is good for me, what is good for her, and what is good for the children? What are the consequences of these conclusions (Engagement)? Finally, we return to the Reflection/Transformation dimension. Perhaps a different man could hold the paradox of loving his wife and wanting to maintain an intact family while at the same time feeling passionately for another. He feels the tension of the paradox and in this case, he must resolve it because the situation at home has become untenable.

The big transformation that occurs with some people is the ability to see beyond the self, to get beyond narrow personalistic concerns, and to move to more universal or at least shared or common or general ones. How could John have acted with integrity in this situation?

How to see beyond the self

How can people acquire the ability to think in this more complex, comprehensive, and compassionate way? In my research I have uncovered three, two or perhaps all of which can be practiced directly. First comes a habit of mind that I inculcate in my students. It is called Wisdom Watch. I assign Wisdom Watching to them for homework for the course of the course and for the course of the rest of their lives (and for you too, dear reader). It consists of looking for wisdom all around you in your daily life: in the newspaper (where I read the Don Samuels story) or on television, in movies and fiction, in overheard conversations or in direct encounters. I ask for the opposite also, which is folly or foolishness—but they must turn it around with some idea on how to make the folly less foolish.

Second is the Third Person Exercise. It goes like this: Project yourself five years into the future and write down *in the third person* what is the difficult situation you were undergoing five years earlier. Describe what that person was doing and feeling. So, you would get this: "Now it is the year 2017. Back in 2012 she…." Then write down what is happening today in 2017 and how the situation got resolved, or what changed. . When people have done this simple exercise, I have seen some major shifts in their perception of the situation in which they find themselves.

Third, we can use Sternberg's definition of wisdom with its emphasis on the balancing of interests:

> Wisdom is defined as the application of tacit knowledge as guided by values toward the achievement of a common good, through a balance among intrapersonal, interpersonal, and extrapersonal interests of the short and long term, in order to achieve a balance among (1) adaption to existing environments (2) shaping existing environments, and (3) selection of new environments. (Sternberg, 2001, p. 231)

In this definition, the intrapersonal is one's own self-interest, the interpersonal the interests of others, and the extrapersonal other aspects of the context in which one lives, such as one's workplace, city, community, country, even God. Thus, consistently insisting in one's mind upon examining the balance of these elements helps us get outside of ourselves to see a situation more clearly, to behave with respect, and to act justly. If husband John had thought this way, I wonder what his actions would have been.

Getting to "We"

A Russian rocket painted with a giant Pizza Hut logo carried advertising into outer space. Stadiums are named for corporations and even buses have advertisements emblazoned on their sides—and even on the windows. A recent column by Thomas Friedman (May 12, 2012) used these examples from a book by Harvard philosopher Michael Sandel *What Money Can't Buy: The Moral Limits of Markets* (2012). We are becoming a market society where everything is up for sale, but as Sandel points out, market values crowd out civic practices. How can we regain them and what does this have to do with wisdom?

A market society directly maximizes good ends for a small group of people (the shareholders and owners). It also provides benefits, if it is a good product, for countless thousands, even millions. I am thinking, for example, of cars and drugs which cure or improve our symptoms. The problem arises, however, when the market economy becomes a market society, when everything is for sale, when the commons are increasingly diminished or taken over by privatization. The commons belong to all of us and include the wilderness and airwaves, museums and blood banks, public spaces and soccer (Walljasper, 2010). How can we hold on to what belongs to all of us, the commons, and foster the associated civic values?

Can wisdom-thinking skills help people do this? Yes. First, using systemic seeing (Discernment), we can apprehend the whole, seeing how the market is encroaching upon the commons. Employing a systems view allows us to take a look at the situation from the viewpoint of balanced interests (Sternberg, 2000). We realize that self-interest on the part of a market society eschews the larger good, except for a small select group. We can also work

our way through the Emergent Wisdom Model (Bassett, 2011b) to find other wisdom-thinking skills that can enhance civic values.

Conclusions

Can using wisdom thinking skills help us move from "me" to "we"? I believe so because with wisdom we can see systemically into a larger picture than our own narrow viewpoint; we can more easily see how parts relate to wholes and gain a clearer sense of what the whole is—a world that includes both "me" in what I attempt to do for myself or what the market does for its profit and advancement as well as "we" in preserving the commons, the things that belong to all of us: fresh water, air, parks, artistic traditions, and much more.

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Transforming Leadership for Ecological Sustainability in Nigeria: Transformative Learning Leveraging Intention, Spontaneity and Polarity

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Abstract

Learning, whether formal or informal, is not a luxury, it is a necessity if we are to effect transformation. Nowhere is that clearer than in vulnerable ecological and economic environments. The lessons learned there may prove illuminating to those of us practicing in business and academic settings, and our practice there, may in turn, contribute to transformation elsewhere. Sorting through and integrating apparent dichotomies and polarities of formal and informal learning and their respective effects on transformation can sensitize us and help us capitalize on opportunities to learn and facilitate learning everywhere.

Key Words

Case Study, Community, Ecology, Education, Informal Learning, Social Action

Two Kinds of Intelligence

There are two kinds of intelligence: one acquired…

With such intelligence you rise in the world…

There is another kind … …

It's fluid,
and it doesn't move from outside to inside
through conduits of plumbing-learning.

This second knowing is a fountainhead
from within you, moving out.

(Barks, 1995, p. 178)

When considering sustainability at individual, relational, community and societal levels, "plumbing-learning" matters, and we must not underestimate its importance. At the same time, the fountainhead of the learners' resources is equally relevant, and perhaps more likely to be overlooked. These pairings of inner and outer and resource and deficit represent "polarities" (Johnson, 1997) of learning that, once recognized, may be leveraged for the purpose of transformation. Sensitizing learners as leaders and leaders as learners to do so can better effect transformation. Our session will examine a case of a region under extreme duress that may illuminate important lessons for all of us working to effect transformation under challenging circumstances.

We will explore firsthand in our interactive session how surfacing and working through these various creative tensions can provide transformative "disorientation" (Mezirow & Associates, 1990). For example, in the case provided, participants' discovery of their own agency was undoubtedly unsettling in many cases, but ultimately

empowering. Managing such creative tensions in learning and leading has lessons for transforming ecological threats and the leaders who can transcend them in the Niger Delta and for the day-to-day challenges experienced by each of us in our respective and dynamic contexts. Our case story illustrates a central theme of being "prepared to be surprised" which represents one way to approach the tension between our own intent and our own openness to the emergent, as well as foreshadowing the process and product of our session (Owen, 1997, p. 101).

Conceptual Frame And Context

The transformative learning process, formal (facilitated) and informal, can foster change leadership in institutions and communities (Hallinger, 2003). Fragile and richly endowed environments such as the Niger Delta of Nigeria require organized and communities to protect distressed ecosystems against unsustainable mineral exploitation practices and to restore degraded land and water resources. In this interactive session we will orient participants to the context for sustainability using the Niger Delta as a grounding case study illuminating such "polarities" (Johnson, 1997) as intention and spontaneity, leader and follower, learner and educator, present and future, hope and fear, action and reflection, and appreciation and critique. We will situate "ecological sustainability" as literal and metaphoric as we prepare participants to apply a process of dynamic integration to their own learning and community contexts and issues.

Using our case as a spring board for further reflection and engagement, we hope to both explore some of these creative tensions, as well as move beyond some of the dualisms implied in the descriptions and definitions of transformative learning, such as cognitive versus whole person (Yorks and Kasl, 2002) and individual versus whole system (Meyer, 2009). Some TL scholars conceive of the experience not as linear, but as one in which there is no beginning or end to transformation describes it as a "way of being rather than a process of becoming" (Dirkx 1998, p.11). This links it to informal learning which, lacking the definitive signposts of degrees and credentials, unfolds organically, appropriate to our topic of sustainability.

Features of De-Privileged Informal Learning

One could certainly argue that in the Niger Delta, formality may be seen as an unaffordable luxury; conversely, such infrastructure may also be seen as absolutely needed. Nonetheless it is formal learning that has been privileged over informal learning in both traditional academia and in corporate America and global industry, to the detriment of both types of learning and settings. This is not to say there is anything inherently wrong with or bad about formal learning, only that some elements of formal learning jibe with American social biases toward visible agency, competition, and execution, and thus may overlook such values as communalism, cooperation and being-orientation.

This visible outcrop is, however, merely the tip of a deeper underlying structure, the structure of informal learning and development. Informal learning may be defined as the development of the dynamic ability to make "context-sensitive judgments" in changing environments (Hager & Halliday, 2009, p. 30), which is what we all need in today and tomorrow's environment. Degrees, credentials, grades, and certifications are only proxies, albeit sometimes useful ones, for the practical ability to achieve bottom-line results in a self-correcting, self-generating, and self-sustaining process. The community members and activists in the forthcoming case study engaged in a range of informal learning strategies that paralleled those described below.

- Organic/holistic

- Contextual

- Activity/Experience based

- Arises in situations where learning is not the main aim

- Learner-driven

- Often collaborative

- Indeterminate

- Opportunistic

- Includes both internal and external goods

- Ongoing

- Possible under any and all circumstances

- Tends to be de-privileged

(Cross, 2007; Hager & Halliday, 2009, Langer 1997)

Given the obvious practical transformative benefits of such just-in-time, context-sensitive, resource-building attributes, asking, "Why can't informal learning be more like formal learning?" is a lot like saying, "Why can't developing regions act more like developed ones?" or even "Why can't a woman be more like a man?" --in other words condescending, unintentionally revealing, and naïve. Nor does reversing the question make it more palatable. Like male and female, the two apparent opposites do indeed exist in relation to one another but include a multitude of overlapping/continuous more so than opposing attributes. Appreciatively seeking and amplifying value wherever it is found beyond the ideological label will do more for learners, learning and results than will advocacy for one over the other. At the same time, encouraging subjectivity, intersubjectivity, social co-construction and the celebration of mistakes as learning opportunities can serve as scaffolding for all learning. As we jointly reflected on one of the author's (Udoh) case study, we discovered many of these attributes.

Niger Delta Case Study

In December 2011, one of the authors, Udoh, adapted a four-level social-ecological model, using focus groups, to investigate the roots of violent conflict in 15 oil communities in Nigeria's Niger Delta. The four levels accounted for the micro- and macro-level risk factors perceived by focus group participants as sources of violent conflict in their communities. According to the Centers for Disease Control and Prevention (2009) and Dahlberg and Krug (2002), the social-ecological model considers violence as the product of "the complex interplay between individual, relationship, community, and societal factors". Among individual-level determinants of conflict, focus group participants identified personal ignorance, illiteracy, and lack of skills for employment and entrepreneurship; they identified selfishness of principal landlords, greed by unionized contractors as key relational determinants of violent conflict; at the community level, they identified leadership challenges, including imposition of corrupt leaders by government and oil companies; at the societal level, they identified the divide and rule policies of multinational oil companies, environmental pollution (in particular, oil spills and gas flaring events), lack of regulations to protect the environment, unemployment, poverty, and regional socio-political marginalization as causes of violent conflict.

Findings from this study are being used to develop short participatory and transformational health educational interventions that target 50 heavily polluted oil communities in Rivers and Bayelsa States of the Niger Delta. A key goal is to identify, train, and empower leaders of key constituencies within the oil communities to monitor the methods used for oil exploration and production by oil companies to ensure that they are sustainable and minimize environmental pollution. Community health workers are also trained to educate the people in the most polluted communities to protect themselves against water and land contamination by benzene, hydrocarbons, and other chemicals and gases that pose serious threats to human health and environmental sustainability.

The current state of non-sustainability resulting from the mounting social, human, and environmental costs of oil exploration in Nigeria has been largely ascribed to the failure of leadership (Frynas, 2001; Hargreaves, 2002). Described as the world oil pollution capital http://www.bbc.co.uk/news/10313107), the Niger Delta has been burdened by extensive oil spill and gas flaring issues, more than any other oil producing region in the world (Eweje, 2006). More than 546 million gallons of oil (excluding toxic wastes) have been spilled in the region in five decades;

24 billion cubic meters of gas is flared yearly, releasing an estimated 70 million tons of carbon dioxide per day into the environment (UNDP, 2006). According to the World Bank (2007), oil production in Nigeria accounts for more greenhouse gas emissions than all other sources in sub-Saharan Africa combined. Stakes are high and transformation is imperative.

A project to train women and youth as trainers and community organizers has so far resulted in significant material results, including the closing of dangerous water pits, compensation to landowners whose land was seized under eminent domain, clean-up of oil spills, and a lessening of the sex trade, among other outcomes, through the development of relationships, coalitions and partnerships, resting on the development of negotiation and influence skills, including civil action such as 10,000 women occupying a Chevron installation and disrobing (the most extreme form of protest available for a Nigerian woman). Moreover, trainers and those they organized transformed through their activism into believers in their own empowerment. This was effected by training that included voluntary and informal gatherings at such settings as churches and community centers by farmers and fishers who used their anger to fuel constructive and ultimately positive action, some of whom, lacking awareness of other options, had formerly resorted to gun violence as the most powerful expression of their rage. The impact of this transformation has resonated from an individual to a relational to community and societal level to create the potential for long-term systems change.

How was the process of moving from hopelessness to empowerment effected? Bringing hope and intention, transformational leaders enact fundamental changes in direction, development, productivity, and perceptions (Bass 1985; Bennis & Nanus, 1985; Burns 1978). Speaking to higher-level needs (Johnson, 2001, 122), including the terminal values of liberty, equality, and justice, transformational leaders can have a significant impact on the people and groups that they lead. To do so they must engage both intentionality around the goals they hope to achieve and the emergent spontaneity of the present, capitalizing on the "teachable moment," as well as imparting that capacity in their followers (Lawson & Flocke, 2009). This requires an active and dynamic process of integrating such apparently paradoxical polarities as appreciation and critique and roles of leadership and followership, teacher and learner.

Implications Across Practice Settings

What is true about learning and leadership for this context and setting is no less true for any of those in which we practice. At the Center to Advance Education for Adults (CAEA) at DePaul University's School for New Learning in Chicago the authors spent a year asking the question "What if every encounter were a learning encounter?" Offshoots of this question included: Why can't bosses in corporations and formal academic advisors be more like mentors, i.e., relationally attuned and responsive? How can learning leaders get credit for informal learning, as the ultimate, lean, cost-free 24/7 intervention? How can leaders and followers share accountability for learning processes and outcomes? How can individual learning style differences be better accommodated, whatever the setting? Some crucial integration between the intention and transparency of formality and the spontaneity and agility characterizing more voluntary settings seemed necessary.

The challenge is that learning is such a ubiquitous human phenomenon it is easy to overlook without the trappings of formality, and, as weddings can overshadow the substantive and dynamic reality of marriage, formality has a way of distracting us from that which demands attention. To a point this may be entirely functional, as the transformative significance of this ritual may require a certain anesthetic loss of consciousness in order to be consummated, assimilated, and integrated.

Yet attention may be the very thing that weds spontaneity and intention. The construction of a safe yet relatively unconfining learning environment, a dynamic focus that looks to both the immediate dynamic moment and the even less predictable future, to the self and the self in relationship to others, and being, "prepared to be surprised" (Owen, 1997, p.101) can manifest as both internal individual practices and environmental conditions intentionally engineered by leaders and/or learning professionals.

Related potential learning polarities include, and are not limited to the following:

Formal vs. Informal

Acquisitive vs. Instinctive

Objective vs. Subjective

Teacher vs. Learner vs. Student

Managerialist vs. Emancipatory

Solo vs. Social

Intentional vs. Spontaneous

Participants in our workshop may well be able to offer many other pairings seen reflected in the case or relevant to their own practice settings. Our view of these relationships is that attributes of each are present in all learning situations, these attributes are *interrelated* and interdependent in crucial (Hager & Halliday, 2009, p. 32).

Seizing the "teachable moment" is *intentionally* capitalizing on the *spontaneous* opportunity to facilitate a context-sensitive concept, such as when trainers in the Niger Delta met with women in their church groups and helped them understand the dangers in their environment by discussing their daily routines. Extracting lessons from complex settings, we ask how can formal learning "learn" to be more spontaneous? How can informal learning "learn" to be more intentional? In answering these questions we need to remember the following: 1) learning is ubiquitous; it happens all the time, 2) the degree of formality does not determine the quality of learning, 3) awareness of intention and openness to spontaneity by learners and learning.

Some practices enhance learning, whether formal or informal. Variation and novelty keep learners' attention (Langer, 1997). A forgiving attitude toward mistakes, hallmark of play and informal situations, promote closer-to-optimal conditions for taking in and acting on new information. An openness of focus elicits whole-brained thinking. Building on these, engaging learners' preferences, even naïve ones, versus mytholgizing specialized "expertise" encourages the aforementioned forgiveness and openness at the same time as it raises the learner's personal investment in novel areas of potential interest (Langer, 1997). Finally, honoring this subjectivity and intersubjectiveness completes the spiral. It is our hope that our participants may, in exploring polarities within their own specific practice contexts, identify means of enhancing their own learning, and, in fact, experience and practice these phenomena directly together, in the workshop.

Experiential Workshop Process

We hope to provide a potential experience of transformative learning in the workshop through structured reflective processes. These share elements of both formal (i.e. structured) and informal (i.e. ad hoc and individualized) learning. Facilitating a series of exercises we will frame our case study, as well as encourage participants to consider their own experiences.

To orient participants to the concepts of formal and informal learning, we will introduce the session with a reflective exercise which surfaces the tensions between formal and informal learning, results of which they will share with a partner, and we will ask for brief and voluntary reports out.

Following this exercise, we will segue to the case study. Next, to surface their own attitudes, participants will discuss, in small groups, the following statements and share their views on which they feel strongly about and why.

Learning is acquiring accurate skills and knowledge.

Learning is primarily an individually focused and cognitive phenomenon.

Learning requires discipline.

"A little knowledge is a dangerous thing."

Learning centers on stable and enduring scientific principles, i.e., the more generalizable, transferable, and replicable, the better and more valuable it is.

(Hager & Halliday, 2009; Langer, 1997)

We will debrief this experience and elicit whether such attitudes have been encountered in participant practice settings and what the impact has been.

In the capstone exercise we will ask participants to review their own and others' reflections on the questions posed and the information presented, and, considering their unique practice context, discuss the connections among them and ideas for blending formal and informal learning to enact transformative learning. It is our hope that the gravity of the Niger Delta case coupled with its positive outcomes will inspire a deep optimism in others who will in turn inspire all with whom they come in contact.

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Exploring the Faculty-Institutional Role in Support of Emerging Scholars: Knowledge Construction and the Diversity Divas

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Abstract

The role of institutional programs in supporting emerging voices into mainstream scholarship is complex. Power and positionality impact the potential for emancipatory praxis, as students move from margins to centers. The narratives of the Diversity Divas, a collaborative inquiry group of doctoral students from Teachers College, Columbia University, and their faculty advisor, Dr. Bitterman, illuminate the tensions of negotiating politics in knowledge construction; from individual and group voices to the multi-directional student-faculty relationship. Listed alphabetically, the students are: Maria Liu Wong, Naya Mondo, Ramona Sharpe, Aimee Tiu-Wu, Connie Watson and Rosie Williams. Recommendations are made for supporting student groups in cohort-based adult learning and leadership doctoral programs.

Introduction

The journey of doctoral students towards becoming scholars is complicated by power and location. What is the role of faculty, and/or institution, to enable students to own and contribute to knowledge in and of the field? Does the positionality of students and faculty change over time? Based on the experience of six female doctoral students and their faculty advisor, this paper and experiential session explores the stories of the Diversity Divas and the politics of knowledge construction. *What was, and should be, the faculty-institutional role in guiding a student group's journey towards knowledge construction in cohort-based adult learning and leadership doctoral programs?* Examined through Deshler and Grudens-Schuck's (2000) framework of power dynamics, individual and group experiences are expressed in relation to faculty-institutional context.

Background and Methodology

The Diversity Divas began as a group assignment for the "Learning Communities" seminars, taught by Dr. Jeanne Bitterman at Teachers College, Columbia University. Using collaborative inquiry (CI) to explore cross-cultural awareness and diversity, we went beyond course requirements by presenting at conferences and publishing a chapter in a handbook on workforce diversity. Heron's (1992) multiple ways of knowing were integrated into the process to bridge the rational-emotional divide for deeper whole-person knowing, with attention paid to spirituality and voice (Belenky et al., 1986; Tisdell, 2003). Themes and relevant learning were captured through journals and envivo coding done individually and in pairs. Exploring Deshler and Grudens-Schuck's (2000) "false dichotomies" in power relations and knowledge construction (theory versus practice; quantitative versus qualitative research; generalizable versus local knowledge; outsider versus insider status; and mind versus matter dimensions), we tell our narratives in multiple voices, marked by dissonance amidst harmony.

Beginnings: Motivations and Group Formation

Rather than prioritize theory over practice, the CI model establishes and maintains a culture that challenges the dominant paradigm by "push(ing) the boundaries of what knowledge making is all about" (Clark & Watson, 1997, p. 57). It changes the structure, assumptions, and perspectives of how co-inquirers' experiences are viewed, bringing context to "knowledge". Institutions are made of people who bring their own lived experiences and perspectives to teaching. "Those who control these resources – ideology, information, access, and material conditions – and the micro-politics surrounding them (Ball, 1987; Sissel, 2000) sit at a powerful center" (Sheared & Sissel, 2001, p.4). We as students and faculty challenge their hegemonic potentiality.

For Whom is Knowledge Constructed?

Maria and Naya: During the first summer of our program, we explored with Connie the idea of doing a CI together around our experiences as women, educators and emerging scholars. We were intrigued by a methodology that valued our perspectives. Experiencing "the silencing of lived experiences in discourses constructed through legislation and policies created by the dominant culture, which either 'commatizes or negates' the political,

economic, historical and social realities of those living in the margins of society (p. 73)" (Sheared, 1992 in Sheared & Sissel, 2001, p. 4), we sought to contribute our voices to mainstream scholarship.

Connie, Aimee, Ramona and Rosie: Our interest in diversity and gender converged with the idea of working with a supportive group of like-minded individuals on a mutual research project. We had not anticipated excluding men from the conversation, but after initial interest from others shifted, we ended up delimiting to a group of women from various backgrounds – human resources, non-profit sector, secondary and higher education, and theological education.

Jeanne: With experience, my belief in the emancipatory nature of participation in small group learning experiences has been affirmed. The learning communities sequence evolved from a more theoretical emphasis to a mandate that members of the cohort co-create in diverse small groups around topical interests. My conviction that transformative learning takes place in the affective domain of such groups has strengthened over time. This requires the facilitator to relinquish a bit of "institutional" power and learn to trust in the process. Personal fears historically have revolved around issues of maintaining authority and hence inadvertently serving to reproduce social injustices at the micro level. Through this process of collaborative inquiry and action research, academics can counter exclusivity, stress inclusivity, and make room for students who frequently otherwise claim their voices and interests have remained marginalized in academia.

Initially with great delight I saw these women come together with unusual clarity of purpose; however as facilitator, I felt responsible to ensure they did not exclude others. They were instructed to be open to at least one additional member. My struggles revolved around the degree to which my role would be instrumental - for consultations when asked (for example, reading proposals) versus intervening into helping to scope and define their processes. While highly interested in joining their inquiry, by virtue of formal authority, my participation might have tipped the exploration towards the conventional imposition of the privilege of white institutional power.

The Group Process: Negotiating Politics
Rather quickly, the group moved from fulfilling course requirements to presenting at professional conferences. Proposals led to deadlines for papers, which intensified pressure for time and achievement. The politics of knowledge construction became complicated, as the desire for voice and belonging was strained through limitations of time and space.

Collaborative Inquiry as a Democratic Process: Who Constructs Knowledge?
Naya, Maria and Ramona: Becoming visible through understanding and reflecting on our own learning and experiences gave us continued passion and need to construct knowledge ourselves. "When one is invisible, one does not take up space in our minds, our hearts, nor our economic, historical, political, or social concerns" (Sheared & Sissel, 2001, p. 6). The essence of CI was to use our different stories in one cooking pot, to recognize the existence and relevance of subjective realities. Fueled by our shared passion to bringing diverse voices and knowledge to our curriculum, we had to be attentive to relationship and listening, commitment, reflection, dialogue, and openness to divergent views.

There were "new self" and "new language" in the CI process, and that reflected the reality of knowledge making (Clark & Watson, 1987, p. 59). Knowledge could be expanded by utilizing an alternative paradigm for working with emerging scholars in adult education programs, drawing on the collective strength of participants and extending collaborative learning fostered in a diverse group like ours. The CI pointed to the need for faculty/institutions to partner with students in knowledge development.

Belonging, Identity and Power: Whose Knowledge Counted?
Maria and Connie: In the group, it was still unclear how people felt as to whose knowledge counted. Some of us stepped in when others weren't able – whether because of illness, family, travel or whatever circumstances came about. Sometimes out loud or silently, we wondered about the level of commitment we had to the group, and what that looked like. How did our actions speak in the balance of decision-making and power?

Ramona: Inclusion and belonging in the group were extremely complex because the Divas and their faculty advisor continuously moved from "insider" to "outsider" roles. Their advisor was an "insider," privy to the Divas' plans, projects and individual journals. However, she was an "outsider" because of her institutional role. The Divas were "insiders" as part of the CI group, but individual members left out of conversations (whether due to physical location, previously established relationships, etc.) felt like "outsiders."

Power dynamics also emerged as critical, impacting approaches to decision-making and project direction. Whose opinion counted? An organic approach was used and resulted at times in miscommunication but also afforded the most flexibility to the group.

Time and Space: Pressure to Prioritize or Sacrifice Authenticity

Connie and Maria: Time was a significant factor for engaging in a group process. Did we all put in the same time? One had to be willing to devote time for the collaboration, balancing it with other commitments. As full-time students, parents, wives and community members, we often struggled with finding time to pursue our inquiries in person, especially since at times we were separated by hundreds of miles.

Naya: Commitment was not always addressed sufficiently in the group. Engagement in the CI process required multiple levels of commitment. This included finding ways to work with various ideologies, experiences, research orientations, styles and needs of the different members. Because friendship, support and solidarity were valued so highly, divergence and expressing one's true voice was sometimes put aside. At the end of the day, the knowledge that emerged was not what remained hidden but what came to the fore.

Holding Environment: Sufficient Challenges, Supports and Emotions

Ramona: A positive, safe and secure holding environment was crucial to the success of the Divas. However, its importance sometimes superseded the importance of ensuring every voice was heard. There was even trepidation to confront conflict for fear of negative implications it might have on the holding environment. Emotions impacted the process of self-discovery and construction of knowledge, at times influencing area of focus and depth of exploration.

The Divas apparently lacked a strategy or process to deal with negative emotions, a natural part of knowledge construction, missing an opportunity for deeper growth and understanding. On the other hand, positive emotions propelled the Divas onward. We received much support from faculty, friends, family and the academic/scholarly community, which helped us to nurture our scholarly aspirations, find our voices, as well as confirm our research was both important and needed in the literature.

Jeanne: Another caution for facilitators is to guard confidentiality and respect privacy. As the reader of private reflections on individual, group and meta-group processes, there were times when micro-aggressions were exposed or individuals came to discuss them. The Divas' sensibility was that interference into their process might denude what they were working through. It required a fair amount of restraint to refrain from interceding on issues that were, and remain, ripe learning opportunities. One perennially must ask what privilege justifies institutional authority's interference into others' development? The holding environment the women created for themselves seemed paramount; interjecting threatened to jeopardize this priority and thus was deemed not justifiable.

IGI Handbook Chapter: Six Cooks and One Broth

Aimee and Rosie: Through Dr. Yorks, a faculty member, we had the opportunity to contribute a chapter in the *Handbook of Research on Workplace Diversity in a Global Society: Technologies and Concepts*, edited by Dr. Chaundra Scott and Dr. Marilyn Byrd. We took on the challenge to produce quality scholarly work while writing dissertation proposals and facing major personal life transitions. Consensus was reached for three members to lead. While the general direction of the paper was discussed, specifics were left to the discretion of the lead writers. While affirming our identities as budding scholars, ironically it brought us to the precipice of falling apart. Rationality and emotion influenced our individual and knowledge co-construction at this point.

Knowledge Construction in the Emotional Domain: "The Volcano Metaphor"

Aimee and Rosie: In the domain of emotion lies deep commitment to individual "belief systems" and cultural values that shape a person's assumptions, habits and priorities (Tisdell, Hanley & Taylor, 2000). Our "successful" journey was marked by frustration and discord within the lead writers. While discontent and frustration due to differences in perspectives, styles and preferences might be expected, we were astonished at the "amount of emotional and mental stripping" brought forth by the *paradox of diversity* (Yorks & Kasl, 2002).

Our experience affirmed our group image of a volcano, denoting the expansive but potentially explosive energy that diverse women might generate. The metaphor came to life, threatening solidarity - "a strain in relationships…emerged (that)…might lead to a rift between individuals." At the time, we failed to appreciate the critical role of conflict in generating new knowledge since deeper relational experiences with others could reveal personal blind spots. Despite emotional weariness from the experience, we all expressed genuine desire for further engagement specifically through debriefing.

Knowledge Construction in the Rational Domain: Mind/Body Split
Aimee and Rosie: Our CI explored cross-cultural consciousness through whole person knowing and we experienced the tension of the mind/body schism (Yorks & Kasl, 2002). Describing our experience in a field that privileged reason over the body and emotion required a delicate balance of sharing our ideas in scholarly work despite intense emotions, conflicts, and physical limitations. In the end, we were confronted by rumblings in our group, and became highly defensive and sensitive of each other's frayed nerves, while carefully protecting the crucial work we had created.

Moving On: "So Much to Unite Us, So Much Deep Within Us to Divide Us"
Aimee and Rosie: After the chapter project, we debriefed with the intention of rational discourse and self-reflection. However, it was too much too soon for some of us to be fully authentic. In the end, we planted seeds together, recommitting to each other's growth and learning. We shared ideas on conducting difficult conversations with the hope of re-orienting the group by having a retreat. However, the opportunity to work with Dr. Bitterman for the Transformative Learning Conference took precedence.

Divas: While the group's raw sense of vulnerability has diminished a little, most of the women are still left wondering, "Where are we, where will we go, will there be room for us to go places we need to?" The question regarding enlisting an "outsider" as facilitator remains strong: "Do we see Professor Bitterman as an external observer/participant and advisor who can help us go places we wouldn't otherwise?"

Jeanne: Given the many successes of the Divas, one cannot help but feel proud to have been part of their process and hope to remain a part of their future endeavors. It is always challenging when one cannot "belong" to or join in such groups. With respect to this group's process, the "faculty-institutional" role remained that of the "guide on the side": being accessible for consultation, seeking resources to support their travels, and reading and critiquing their work. While some positive claims can be made with respect to mandating action research projects and requiring students to co-create, it is not without some cautions or paradoxical tensions.

In their particular cohort, almost all of the groups had projects shared in a peer-reviewed journal or at a conference. The one group that did not was topically focused on the right to resist. The composition of groups and scoping of compelling and viable projects is *key* to success. Despite years of honing such experiences, no magic formula has emerged to date to ensure this happens for all; rather vigilance and trust are the core ingredients.

Knowing whether, when, and how to intercede in small group processes is a delicate balance of shaping the direction of the knowledge created versus supporting the process and allowing it to be owned by the group. It is an agonizing process deciding when and with whom to impose the faculty (or at least my) perspective. Finally, we are reminded not all doctoral students are interested in the collaborative process despite this being the nature of the program. Mandating such participation is in some ways antithetical to the very concerns expressed earlier about social reproduction. There is the perennial challenge of how to be constructively critical and yet responsive to new peripheral forces in the field.

Some questions that recur revolve around the following: how to limit a group from taking on too much; how to rein in the excessively ambitious; when to intercede in interpersonal conflicts regarding feelings and micro-aggressions; when and how to impose deep level learning when a group articulates a preference to stay in their

safety zone; whether and how to reflect candidly on topical agendas and question framing; how to ensure optimal and viable group size and composition; and so on and so on; the list is endless.

Factors to Consider and Recommendations

Jeanne and the Divas: Several factors need to be considered in supporting student groups in a doctoral cohort setting. These are addressed at the levels of individual and small group, as the nuances are significant for each context.

Individuals

1. Commitment may increase when focusing on area(s) of interest that students are passionate about.

2. Exposure to literature and theories earlier on allows for research interests to grow.

3. Learning how to share one's voice without quieting those of others is critical.

4. Building relationships and developing trust takes time; one must be committed to working through hurt feelings and miscommunication.

5. Authenticity and timing may be difficult to navigate because readiness is different for individuals.

6. Personal priorities affect engagement with and commitment to the group.

Small Groups

1. Academic scaffolding is important; start with assigned groups, allowing groups to work together to better understand, describe and explain a concept and practice a process, and then move on to more self-directed opportunities.

2. Paying attention to the false dichotomies of knowledge construction can provide for more balanced inquiry.

3. Context matters; background and research interests of faculty and students, and the institutional environment impact a sense of belonging.

4. Promoting growth outside of the university program is important.

5. Faculty/institutional support (advocacy, encouragement, and mentorship) is critical.

6. Faculty/institutional direction or scaffolding for dealing with conflict and developing a process for working together; reconciliation post-conflict is paramount.

7. Knowledge construction is affected by: power sharing, emotions, decision-making processes, achievement orientation, individual priorities, conflict, inclusion, holding environment, time and space, curriculum scaffolding, faculty/institution support (during & post-academic program).

8. Exclusion is inevitable when a group delimits; dialogue about power and positionality can help.

9. Prioritizing individuals' gifts/strengths helps productivity, but impacts dynamic when people switch roles.

The Experiential Session

The experiential session accompanying this paper explores our multiple stories and how we made meaning and constructed knowledge on the individual and small group levels. In light of the false dichotomies of knowledge construction as they relate to the journey of the Divas and their faculty advisor, we will engage in variations of perspectives through movement, voice and silence on our CI questions. Power, positionality, and privilege will be investigated through choreographed movement and interaction with participants.

Conclusion

Divas: In retrospect, CI allowed us to contribute to thoughtful praxis, prioritizing qualitative lived experience. As individuals, we contributed local knowledge that resulted in a greater sense of mutuality, as we had much in common despite our differences. The outsider versus insider tension varied from time to time, and context to context, underscoring its complexity. We did not leave space however for an outsider to "catalyze action in a way that may be more difficult for insiders' inquiry into unproductive aspects of local dynamics and realities" (Deshler & Grudens-Schuck, 2000, p. 599). Human agency was combined with interaction with the environment in the case of mind versus matter.

Coming into "our own" as emerging scholars, we found our voices mattered, and we constructed knowledge, not only for ourselves, but also for others. Our CI provided an example of the potential for transformative learning to take place within an institutional context. However, it was not without negotiating the politics of knowledge construction scaffolded by faculty.

Jeanne: We all learned so much from the Divas, about the paradox of diversity, about how institutions can push the limits and help students challenge the status quo, and how students can be socialized into our community of practice while concurrently helping it evolve. We are hopeful the themes discussed above provide interesting and challenging reflections for others' development of themselves as practitioners as well as for emergent scholars concerned about constraints of our discipline.

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Using Collaborative Inquiry to Investigate the Nature of Personal Fears

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Abstract

Fear manifests itself at both the individual and group level and impacts our ability to engage in transformative learning opportunities. Which begs the questions: What if we could understand the nature of our fear? Would this allow us to overcome the fear entirely? Collaborative inquiry (CI), a practice of recurrent meetings followed by reflection and action through which a group tries to answer an important question (Bray, Lee, Smith &York, 2000), may be an effective tool for surfacing and addressing the underlying nature of our fears that often limit our ability to embrace transformational changes.

Keywords

Collaborative inquiry, Fear

Introduction

This paper provides a comprehensive report on a collaborative inquiry (CI) effort conducted by the authors. Our group focused on the concept of fear as it relates to sharing or revealing our authentic selves. We each experienced this fear differently and were able to identify specific situations or risks where fear was palpable and powerful. As a group, we set out to address a common question: *What is the nature of the fear that keeps us from taking the risk we are considering?* Although the impetus for our group was driven by individual curiosity, it is important to note that we also hoped to learn something about the nature of fear that could prove useful to others. Fueled by curiosity about the nature of fear, we explored individual fears through different experiments, hoping to gather empirical data that might contribute to learning. Over the course of twelve weekly meetings, we shared individual results and subjected our experiences to group inquiry and reflection.

This paper addresses four primary areas. It provides a review of the theoretical basis used for our inquiry, discussing briefly the primary thinkers who influenced our work. It also describes the methodology we used as we conducted our inquiry. This paper describes the session that will be presented at the 2012 Transformative Learning Conference. Finally, the paper provides a summary of our learning to date.

Primary Theoretical Foundation

Bray, et. al., define CI as "a process consisting of repeated episodes of reflection and action". (2000, p. 6) Accordingly, the theoretical foundations for our group work were derived from the school of American pragmatism. Specifically, John Dewey's ideas about experiential learning and George Herbert Mead's thoughts on social learning helped us craft a plan for our collective effort. Bray, et. al. note, "For Dewey, human experience is central to arriving at knowledge" and that reflection on experience can lead to "possibilities of action". This section of the paper describes how the work of Dewey and Mead provided the primary theoretical base for our group.

Dewey

Dewey believes that learning through educative experience is necessary to development. He believed that every experience takes something from the past, modifies it, and changes the future action of the agent. For Dewey, an experience must first have continuity, meaning "every experience both takes up something from those which have gone before and modifies in some way the quality of those which come after". (1997, p. 35) In our group, continuity of both individual and collective experience allowed learning to occur throughout our CI process.

The initial intent of our group was to review personal experiences that involved fear and try to determine the nature of that fear. We designed individual experiments based on the results of our reflections and utilized these experiments to test our learning and gain new experience. In practice, this process is consistent with Dewey's ideas about pragmatic inquiry and worked well for our group.

Mead

Mead's ideas about learning are grounded in the idea that human consciousness arises out of symbolic communication. Learning is the result of social interaction. Our group was guided by Mead's theory as we shared stories and explored the source of our fears. Listening closely to each other and engaging in dialogue allowed us to gain insight to make helpful suggestions. The raw emotions of the stories told by members of our group were not personally connected to those of us listening. Thus, we were able to be more objective than the person experiencing the fear. This is important because it demonstrates that simply receiving feedback on our stories was not enough. What was most important was how we each received feedback and interpreted it. This is consistent with Mead's ideas about social learning and served as a firm theoretical base for our work.

Other Theoretical Influences

In addition to Dewey and Mead, each member of our group also discovered that their CI experience was impacted by the thinking of other scholars. Marsick and Watkins informal learning, Kegan's Constructive Development Theory, Illich and Tennant's attention to learning outside the classroom, and Daloz's concentration on mentoring helped us understand and appreciate the learning we were experiencing so that we could understand how our individual fears were being challenged and conquered. In an interesting way, the process of incorporating these other thinkers is very consistent with both Dewey and Mead. The individual effort and study devoted to learning about other theorists was itself an experience. Pausing for reflection on the experience and the subsequent action involved in incorporating new ideas into our CI process is a very pragmatic undertaking.

Marsick and Watkins

Victoria Marsick and Karen Watkins' exploration of informal and incidental learning provide a framework for processing how everyday experiences and interactions translate into learning. One member of our group found this framework beneficial in examining our collective processes. This member commented, "The control of individual and collective learning experiences rested solely in our hands, which speaks specifically to the nature of informal learning. The ability to engage one another in somewhat directed conversations surrounding our individual experiences and progress created an environment where informal learning opportunities were able to flourish."

Kegan

Two members of our group were impacted by Robert Kegan's Constructive Development Theory. They found Kegan's thinking closely linked to Mead's ideas. Kegan explains learning as an activity that occurs in six stages throughout a person's life. These stages are important because although they rely upon the concept of social development of consciousness (like Mead) they also focus more heavily upon individual development and how individuals move from one stage to the next or, in some cases, don't move and get stuck.

Kegan's work applied to the CI experience for these two people because the process allowed them to revisit some stage-shifting life experiences. One team member notes, "I think that many of my shifts from one stage to the next occur as epiphanies that feel like waves rolling over the top of my head, much like a wave does at the beach. I had those experiences in my life many times and I think that there are a lot of those waves in each of Kegan's stages. They are feelings that have made me stop and look at the world in a totally different manner than I did before."

Illich and Tenant

One member of our group had their experience impacted by both Ivan Illich and Mark Tenant. Illich's notion that learning happens everywhere – not just in a school setting or through formalized instruction was interesting to this team member. Although our group's effort was part of a formal learning program, the CI process was conducted very informally and allowed learning to happen in ways that were different from our classroom encounters.

Mark Tennant wrote, "Lifelong learning policy reforms attempt to dismantle institutional barriers, open up pathways for learning and forge new institutional identities." (Tennant and Yates, 2005) Tennant has also related how learning has moved from a traditional liberal arts education and moved more towards a more vocationally based education. Our team member shared, "I have been affected by this transformation as a person whose BA was in Asian Studies and was unable to find work related to my degree because people said that I had no "useful skills." After that, I went back to school and picked up some "useful skills" as a tax accountant. The value that I provide for most employers is not located in my understanding of Asian cultures, but of the tax code, which saves clients' money."

Daloz

Another member of our group found a theoretical connection between our work and the ideas of Laurent Daloz. Daloz focuses on mentoring, and our CI process allowed members to serve as peer mentors, sharing insights, perspectives, personal experience and examples throughout the process. Our team member noted, "Mentors provide insights, questions, encouragement and challenges along the way. As a group we were focused on each other's learning and on creating an environment where we could share our experiences".

Methodology

The primary methodology employed by our CI group was the four phase approach of forming, creating, acting, and making meaning outlined by Bray, Lee, Smith, & Yorks (2000). We found this method easy to follow and positive results were generated quickly and continued through the process. This section of the paper provides details regarding our work together.

Forming and Creating

Our team found it hard to separate the tasks recommended for the forming and creating phases of the CI process. In the forming phase, we came together around a common interest in the notion of fear as it relates to sharing or revealing our authentic selves. We found early on that this question was challenging to clarify as a group. Each of us had a different understanding of what fear was and what fear might mean to us. Ultimately, we determined that the fear we would explore should be defined by the individual, and that it was important for us each to explore individual fears that were truly meaningful, as opposed to a collective activity that might cause fear (i.e. skydiving or swimming with sharks) but may not meaningfully impact our daily lives. As we circled the idea of collectively exploring individual fears, we were able to agree on specific wording for our CI question "What is the nature of the fear that keeps us from taking the risk we are considering?" At the same time, we found it critical to establish ground rules (a phase 2 activity) and commitments around the ideas of group process, sharing and confidentiality. In hindsight, we suspect that the overlapping nature of our work from phases 1 and 2 were a result of the extremely sensitive nature of our topic. Collectively discussing individual fear required that we each allow ourselves to be vulnerable with one another. It was clear from the beginning that many of us had avoided the things we fear in order to prevent this type of vulnerability. Exploring this topic through the CI process meant we had to agree from the beginning that we would be open and would address these issues head on with the group.

Since our team members were geographically dispersed, we agreed to meet weekly via teleconference. We also agreed that at least four members of our six-person team had to be present to conduct the meeting. While all of us had to miss one or two meetings, no call was ever cancelled or postponed. Another important part of this phase 1 and 2 effort was the establishment of a leader and scribe for each call. This continuity and timeliness was very helpful and provided focus. This formalized structure allowed us to document group observations, record milestones, hold members accountable and allowed us to effectively utilize the CI process during our meetings.

Cycles of action and reflection were created when we all agreed to articulate a specific fear we wanted to study. We agreed to devise personal experiments to gather data about our fears. Individual processes will be discussed later, but the flow of our weekly calls was driven primarily by reports from each team member. Each member of the group shared their progress on the fear they were exploring. After each member shared, the group would ask questions, provide feedback, and offer support. Group members were active in trying to help each other explore the root of the fear and what the individual was learning about this fear through the CI process. After exploring individual topics, we scheduled time to articulate any learning we may gleaned from the call and to examine the process we followed and how it could be improved. While we were able to establish our question,

design a process and weekly meeting structure relatively quickly, it is important to note that these continued to evolve throughout the entire CI. While our question and structure remained consistent, our effectiveness depended on the individual and group focus from week to week. Overall, there was clear commitment from all members involved, but the learning was not a linear progression, as our structure might imply. Phases 1 and 2 were completed when we had agreed on our question and the process we would use to explore it.

Acting

Phase 3 started naturally when we began to enact the processes we established in phases 1 and 2. As we came together week after week, we became more comfortable and confident about revealing our successes and failures in overcoming our fears. We began to trust each other, and become more vulnerable with the group. After we had the experience of trusting once and seeing that it was respected, we trusted again. By talking each week we built up trust and began to talk about the real reasons we were afraid. Group members also felt more confident in asking challenging and difficult questions, holding peers accountable, and pushing each other to dig deeper into the explanation of how they were addressing the fear from week to week. This combination of increased trust among the group, challenge and support from the members was important to exploring areas of fear that many of us had admittedly avoided. By sharing and reflecting in a collective we were able to gain new insights into ourselves and our fears that we may not have previously explored or understood. While many of us entered this experience with some root explanation or understanding of why we thought this area was a fear – we collectively were able to gain new insights and perspective that enhanced our learning as well as our understanding of fear. We never felt any expectation to suggest – or to take – any specific actions on behalf of each other or ourselves. Phase 3 was completed for our group when we realized that we had each finished our individual experiments, had a chance to share these with the group, and received sufficient feedback.

Making Meaning

Our group has continued to extend the final portion of phase 4. We have a remarkably detailed and accurate record of our activities and well-defined sets of empirical data from each of our experiments. As we sort through this data, we agree that our geographic separation will be both helpful and a bit of a hindrance as we seek to make meaning of our CI experiences. We benefited from our separate locations as we sought to avoid groupthink and check for validity of our ideas in vastly different arenas. Although our separation hindered our attempts to construct knowledge in the moment, we still celebrate in a meaningful way, and speak to the public with a collective voice. We made a commitment to continue our CI work, however, and hope to continue to meet and think together about our experiences. We are not certain when phase 4 will be finished for our team.

Learning

Because our CI group was comprised of six members each in pursuit of a very personal goal, our learning occurred on both the individual and group levels. Each member contributed to making meaning in relation to our primary question. At the same time, these meetings became important elements in our own personal learning journeys. This section of the paper describes the learning we experienced at the group macro levels.

Learning about how we learn

The learning through our CI project exemplifies the principles professed by Mead's concept of social interaction. We met on the phone weekly and served as research subjects both for our own projects and the projects of others. Mead's version of social interaction took place during our weekly calls. As we began our project, we had within each of us a perception of what our individual fears were and what we wanted to learn to conquer these fears. Initially, we found it harder to build trust over the phone. We attributed this to the lack of nonverbal cues and reduced personal connection in our communication. Over time, in spite of the challenges presented with weekly meetings over the phone, trust was developed and deeper conversations allowed us to experience the full CI process. The primary areas of learning for our group were: better goal formation, proper addressing of the question throughout the process, and the use of a support system. By serving as a member, observer and facilitator of a collective process we were better able to experience and understand how this type of social and group learning occurs.

The concept of fear can be ambiguous, and our group learned how to ask penetrating questions about what, exactly, we wanted to accomplish through our work together. We learned to be specific about goals for our group as well as for our individual experiments. When conversations trailed into territory not specifically related to our goal, we learned to rely on our primary question as an anchor. Finally, as we became more comfortable with each other and our method for communication, we began to develop a support system within the group. This allowed us to address our individual fears, and, in doing so, learn about the nature of fear as a whole.

Learning about Fear

Exploring fear through the CI process allowed us to gain greater clarity within our own experience and extract deeper meaning from the experiences of other. Our group formed with the initial understanding that we would experiment on one fear. However, through individual and group reflection, we were able to more clearly identify and reflect on the many ways fear regularly manifests itself in our daily lives. We gained a greater understanding of fear as it impacts how we interact with others and with the world around us. We found the experience of directly confronting our fears to be both empowering and exciting. As a group we celebrated successes and supported each other through setbacks. We also gained insight into how we had created and maintained fears that may or may not be real. We identified how fear could dramatically impact how individuals do or do not learn, grow and develop. Finally, we gained a greater appreciation for the complex and often ignored role of fear in our day to day lives. Addressing fear requires first admitting that it is present, and we found that, at times, this can be the most challenging step.

Transformative Learning Conference Session

In imagining the future of our planet, we propose that the process of collaborative inquiry (CI), a process of recurrent meetings followed by reflection and action through which a group tries to answer an important question (Bray, Lee, Smith &York, 2000), may be an extremely effective tool for surfacing and addressing the underlying nature of our fears that often impede and limit our ability to embrace transformational changes in our lives. At the Transformative Learning Conference we will present an interactive session that will provide participants with exposure to our CI process which was designed to examine the nature of the fear that kept the presenters from taking specific risks that were needed for them to achieve desired behavior change. By the end of this session, participants will be able to:

- Explore how risk and fear are experienced in significant learning.
- Articulate the purpose and primary elements of the CI Process.
- Explore the role of the educator in helping learners relate to and process their fear.
- Explore the beginning phases of forming a CI group and framing the inquiry question.

Conclusion

Collaborative Inquiry enhanced our learning through practical application and reflection upon our own experiences. During this learning journey, we covered the theoretical basis of our inquiry, the methodology and our summary of what we learned to date. We took an abstract problem during this process and explored it from unique perspectives. Through social interactions, we deepened our understanding of what we knew of as fear, which enhanced our individual projects, including running, guitar playing, public speaking, and exploring other religions to a level previously not attempted. While the primary purpose of this effort was to understand fear, our group came away with much more: a new way of learning through social interactions.

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How Stories can Transform Whites Working for Racial Justice

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Abstract

This paper grows out of my effort to tell stories of white people in U.S. history who have worked for racial justice alongside of people of color as allies. My premise is that learning these stories will help white people move toward the development of an anti-racist identity and lifestyle. In this paper I look at how learning about the lives of white anti-racist allies can assist whites in their development toward an anti-racist identity.

The Need for Role Models

In her interaction with white students in her courses on the psychology of racism, Beverly Tatum (1994) often witnessed that when white students are confronted with the reality of racism in U.S. history as well as in the present day, they are often overwhelmed a strong experience of guilt. Even if they themselves had not demonstrated overtly racist behavior they often experience what she calls "guilt by association," that is, a feeling that as a white person they have unwittingly benefitted by the centuries of discrimination against people of color. In my own teaching on issues of race, I have found that white students experience a sense of powerlessness; they cannot undo the atrocities of the past nor do they feel equipped to address contemporary expressions of racism. Furthermore, they are confused as to how they are to relate appropriately to the people of color in their lives.

Tatum (1994) has found that one thing that helps white students through their personal angst toward developing non-racist identity and lifestyle is to be given role models of white anti-racist allies, both living and in the past. She quotes one of her white students who wrote: "Now that we have learned about the severity of the all the horrible oppression in the world, it is comforting to know how I can become an ally" (p. 472) Another student wrote: "I don't need to feel helpless when there is so much I can do" (p. 473). Tatum concludes, "… the restoration of hope is an essential part of the learning process. Otherwise, students, both white and of color, become immobilized by their own despair" (p. 473).

Different Roles of Race

To understand the role that the stories of white anti-racist allies can play in the transformation toward a non-racist identity and approach to life, one must understand the role race plays in the social and cultural identity of white people. People of color are confronted with the reality of race everyday as the deal with subtle and overt expressions of racism on a regular basis. They have had to cultivate what Dubois (1903) called a double consciousness. In contrast, white people can and do go through life oblivious to the role whiteness plays in the way they are treated, the opportunities they are afforded, and the choices they are offered. Guinier and Torres (2002) describe the different ways in which whites and people of color experience race through the metaphor of water.

> "Minus the heat source of privilege, race for many poor black people is like water in a frozen state. The crystalline structure of race locks many poor black people into a set of local relationships that have to be negotiated regardless of their social position as defined by other factors….By contrast, for most white people, including many who are poor, race is experienced more like a vapor than like ice. Water in its gaseous state is not constrained. It is functionally formless. It does not inhibit movement….Their experience permits them to assume an essentially evanescent quality for race" (p. 90).

Thus, while people of color constantly bump up against the perception that they are the "other," white people go through life largely unaware of the ways race has shaped the contours of their lives.

As a result when whites become aware of the ways in which whiteness has privileged them, they feel ill-equipped to deal with the ways their whiteness has guided and directed their lives. They enter uncharted emotional and intellectual territory, and most, if not all, the other white people in their lives are equally ill-equipped or totally clueless. Boyd (2003) has found in his study of racism awareness that when people begin to become aware of the way race and racism has shaped their lives, they experience a high level of emotional discomfort that causes them to

want to retreat to a pre-awareness state of uncritical acceptance of the status quo. Moreover, much of white culture with its projection of colorblindness as it relates to race (Bonilla-Silva, 2006), supports and reinforces this retreat. Thus, Boyd contends that in order to grow in one's understanding of the role race places in one's life, one must make a conscious choice to grapple with the information and emotions that come with becoming more conscious on one's whiteness.

Models of Racial Identity Development

In her model of white racial identity development, Helms (1990) refers to this initial awareness of one's whiteness as the disintegration stage. This stage is preceded by the contact stage in which the white person first encounters the fact that there are people of color. While the person is aware that not all people are white, this fact and its social implications do not concern him/her in any significant way. However in the disintegration stage, the white person first confronts the reality of whiteness in a conflicted way that often causes the person to question the values, beliefs and practices he or she was taught as a child. Whites become acutely aware of the ways that whiteness is more highly valued and the social consequences faced by people of color for not being white. This awareness is often accompanied by feelings of guilt, depression, helplessness, and anxiety, and as one becomes aware of the incongruence between one's worldview and the life experiences of people of color.

In his study of white racial justice activists, Warren (2010) found that these "seminal experiences" propelled people to learn more about the racial dynamics in personal, institutional and systemic dimensions, and eventually to actively challenge and recreate racist practices ,structures and policies. However, Helms (1990) in her studies found that typically whites confronted their internal dissonance by proceeding to what she called the reintegration phase.   In the reintegration phase, whites respond in ways that do not require them to change. Thus, they might change their behavior by consciously withdrawing from contact with people of color, or attribute the difference in outcomes between blacks and whites is due to differences in culture, or they develop beliefs that racism is not the white person's fault and that something else must account for the different treatment in society. In essence in the reintegration phase whites find ways to distance themselves from the implications of their whiteness and people of color who make them acutely aware of that whiteness.

To this point in the process, while whites have become aware of race, they have not moved toward developing a non-racist identity . However, in the next three phases in Helms' model the white person moves in that direction. As one continues to explore the issues of race and racial identity, one enters the pseudo-independent stage and actively questions the innate superiority of whites and accepts the responsibility for the ways he or she has exhibited racist thought and behavior, even if it was unconscious. However, this engagement is almost exclusively on the intellectual level and thus suppresses powerful and uncomfortable emotions leading to the delusion that all is needed is more information and better understanding. As one moves into the immersion/emersion stage, one engages the emotional issues as well as the ongoing cognitive issues in an effort to redefine and restructure patterns of thought, feeling and behavior in a non-racist direction. While the disintegration phase is characterized by denial and suppression, in the immersion/emersion stage this re-engagement with one's emotional dissonance is cathartic. The individual is able to confront the questions of their own racial identity and the racial identities of others in an honest and authentic manner. After grappling with these issues eventually the individual moves into the autonomy stage in which one can embrace one's whiteness without a need to oppress, idealize, denigrate or save people of color. Not only is the person eager to learn from other cultural groups, but in many cases becomes an active agent in dismantling and challenging personal, institutional and systemic racism in the world at large. Tatum (1997) refers to the autonomy stage as a place of "racial self-actualization" but adds that rather than a feeling of having arrived, this stage is characterized by an eagerness and openness to continual personal growth about "racial and cultural variables" (p. 112).

While both the disintegration stage and the immersion/emersion stage in Helms' model are characterized significant emotional turmoil, what distinguishes them is the way in which the individual responds to that turmoil. In the disintegration stage, the person typically employs strategies that physically and emotionally distance him or her from the discomfort provoked by the awareness of one's whiteness. By contrast in the immersion/emersion stage, the individual enters into the emotions with a conscious desire to undergo change in one's attitudes, perspectives and behavior. The person wants to learn so that they can transform themselves into a person who can relate justly, equally and authentically with people of other races and cultures. Thus, in her description of the immersion/emersion stage Helms (1990) points out that whites will seek out biographies of white persons who went

through similar journeys toward a healthy white racial identity development. So what are the ways that stories of white anti-racist allies can support and facilitate this progression toward a healthy, non-racist white identity?

The Role of Stories in Transformation

"To be human is to tell stories." So Clark (2010, p. 3), begins her discussion of the use of stories in adult education. Stories are the ways in which human beings make sense out of the disordered confusion of their lives and make sense of their experiences. In effect one's identity is shaped and determined by the stories one constructs and tells oneself. As Smith (2007) writes "Narrative understanding is our most primitive form of explanation. We make sense of things by fitting them into stories" (p. 32). Hammack (2008) adds that one's identity is always shaped in the interplay between the self and society, and that in effect one seeks to define oneself in response to and the context of the master narrative that the dominant culture is telling. Thus one's story must always be viewed within the larger and social context in which it is being lived.

Human beings have used stories and myths for centuries to define personhood, moral values, the meaning of suffering, and much more through the centuries (Smith, 2007). For example, Smith, (2007) used storytelling teaching of Xhosa children in South Africa, a significant percentage of whom suffer from poverty, abuse, disease and violence-based trauma. Stories were tools that helped the children recapture their rich cultural heritage and restore a sense of dignity. He used stories from the Xhosa culture to remind them that suffering could be overcome, and that they could develop empathy for one another. While many of the stories he told were ancient Xhosa tales and myths, he also used more contemporary stories, such as the story of South African activist, Stephen Biko to remind them of their legacy of resistance to oppression. In telling these more contemporary tales Smith sought to stress that "the past does not resolve itself and that it depends on the vision and drive of real heroes who step up to solve the problems" (p. 37).

While whites seeking to develop a non-racist identity and work for social justice do not suffer oppression in the way that people of color or colonized peoples have through the centuries, there is a very real sense in which the stories that inform their values and visions for the world have been silenced. In the post-civil rights era there is a strong tendency in dominant white society to think that racism is a thing of the past and that we should seek to be "colorblind" as it relates to people of color. As Hughes writes (2007) "students perceive racism as a tragedy of the past divorced from the historical issues … and the contemporary realities of power in American society" (p. 203). The problem in that approach is that the stories of systemic, institutional and personal white racism are not told, nor the stories of those whites who chose to resist that dominant theme in U.S. history. As a result, stories of white anti-racist allies remain suppressed in an effort to keep the sanitized story intact. For to do otherwise is to tell an alternative history, a history of which the fuller truth would need to be told.

Middleton and her associates (2009) use the metaphor of the journey to describe the process by which people of privilege move from awareness to action. Stories provide what they refer to as a "journey guides" or "journey maps" resources and readings that help whites perceive a different way in which to be white in a racist society. In interviews, their subjects spoke of role models and important readings that helped them imagine a different way of being and a new way of living in the world. These maps present the opportunity for whites to embrace what Markus and Nurius (1986) refer to as possible selves, the picture of one's hope for or feared future self. Possible selves are those representations of oneself that one hopes to change or aspires to based on past and present self-awareness. One's possible selves motivate one to change ideas, values, beliefs, and actions toward a more consistent self-definition. Made aware of their privilege and conscious and unconscious complicity in a racist society, whites in the immersion/emersion stage are open to a positive, non-racist white possible self (Helms, 1990). Telling stories of whites who likewise had to overcome and in many cases confront the racism of their day provides pictures of positive possible selves and are powerful sources of inspiration and motivation for change.

However, the purpose of telling stories of white anti-racist allies is not simply to enable whites to feel comfortable with their whiteness, but rather to move toward personal and societal transformation. Whites who embrace the possible selves contained in these stories will often choose to live with conflicting emotions and misunderstanding or criticism from close friends and family, as well as well as society at large. While these stories portray great conviction and courage, they also demonstrate the sacrifices some whites were willing to make in the cause of racial justice. As Roediger stresses there are "costs a racist system exacts at times from those who oppose it" (1999, p. 242).

Stories and Transformative Learning

From the perspective of Transformative Learning Theory stories of white anti-racist allies provide tools for change. Having been presented with what Mezirow (2000) describes as a disorienting dilemma, whites seeking to embrace a non-racist identity and lifestyle must confront their personal meaning structures and cultural paradigms connected with whiteness have operated in their lives. The purpose of telling stories is to provide alternative meaning structures and frames of reference from which whites can draw to change their habits of thought and action in ways that are more consistent with their espoused values and beliefs. Adopting new meaning structures, frames of reference and habits of mind is the essence of transformative learning.

Helms' racial identity development theory confirms that as whites deconstruct their former white identity and adopt a new perspective, stories of role models who have gone before them in that struggle can be a guide and inspiration for their continued development. While such stories alone are not sufficient to accomplish this transformation, they can be vital instruments in the transformation process. When proceeded by self-reflection on one's former racial paradigms and meaning structures, and accompanied by an honest self-analysis on both a cognitive and emotional level, such stories can point a way for whites seeking to overcome the powerlessness of their guilt, fear and anger, and come to the place of embracing their whiteness not as over against but interdependent with the identities of racial others.

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Existential Dimensions: What the Terminally Ill can teach us about Existential Underpinnings of Transformative Learning

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Abstract

A major contributor to existential psychotherapy, Irvin Yalom (2008) suggests that adult attention falls into two overarching foci; one where we concern ourselves with the *everyday*, and the other where we dwell on the *ontological* or our deepest sense of being and mortality. The purpose of this paper is to demonstrate how shifts from everyday to ontological dimensions of understanding can be informed uniquely by case studies of four terminally ill patients, which traced processes of meaning-making through the lens of Transformative Learning Theory, under the care of the Visiting Nurse Service of New York Hospice (Brendel, 2009).

Introduction

It may be that one of the deepest forms of transformative learning involves less of a grasping for new meaning through reflection and dialogue, and more of a purposeful and non-judgmental release of everyday reflection itself. The literature on transformative learning seems, with a few exceptions, to privilege learning through an active exploration of assumptions, especially those inherent in everyday life. This preoccupation with action may in fact distract us from a parallel road to transformation, which directs wisdom seekers toward a quality of awareness outside of ourselves and our everyday problems and predilections. What would happen if instead, action and reflection were actively let go of and the meaning constructs we seek to edify were consciously released altogether, even if just momentarily? What might we discover about ourselves and our capacity for making meaning then? This is precisely the kind of existential dimension that this author observed in a series of case studies investigating a process of narrative-sharing and dialogue with hospice patients (Brendel, 2009). For each of these individuals, Marietta, Emerson, Huxley, and Willow, this process resulted in deep sense of self-given permission, a launch pad for transcending the everyday. Irvin Yalom (2008) expresses an important distinction between the everyday and these spaces as such, "In your everyday mode, you are entirely absorbed in your surroundings, and you marvel at how things are in the world; whereas in the ontological mode, you focus on and appreciate the miracle of 'being' itself and marvel that things are, that you are" (Yalom, 2008, p. 33). The pattern of learning illustrates a process of knowing that seems to rest in the spaces between critical reflection, reflective discourse, and the everyday. Consider the following poem from 13th century Persian Muslim poet, Jalal Al-din Rumi (Barks & Moyne, 2004):

> There is a way between voice and presence
>
> Where information flows.
>
> In disciplined silence it opens
>
> With wandering talk it closes.

Existential Permission

Existential dimensions of transformative learning have been suggested and studied by a number of important contributors to the literature on transformative pedagogy (Morris, 1966; Greene, 1967, 1974; Cross, 2005; and Willis in Taylor & Cranton, 2012). For instance, Maxine Green (1967) artfully assimilated the works of Sartre (1905 – 1980) and Dewey (1938) in a pedagogical and less individualistic fashion and it is suggested that these early authors spoke mainly to the existential dimension of confrontation, or the moment of truth when an individual must stand up not only for what she believes, but also who she is (Willis in Taylor & Cranton, 2012). Over time, the contributions that this author hopes to make are slightly different from what seems to be Sartre's central assertion, that authenticity exists when we actively defy our oppressors when pushed up against the wall and our deepest held beliefs are threatened; where we can still reclaim our freedom by saying no (Barrett, 1962), and in this way remain true to our worldview. But what if our oppressors are not others but rather ourselves? Further, what if the ultimate existential leap is to give ourselves permission to let go of the multiplicity of problematic constructs we create, reflect upon, and recreate for ourselves. In fact, continued everyday critical reflection may yield an even further fractured and even disconnected view of self. Coming to a greater sense of freedom may in fact require a process of

leaping from one's worldviews in some regard. Discussions with certain hospice patients can give us a greater idea and appreciation of what this looks like.

To be more specific, three existential dimensions became apparent in hospice patients as they moved through the research protocol (Brendel, 2009), which consisted of sharing life histories and producing narratives around their present situations. The first dimension may seem antithetical to much of the literature on Transformative Learning Theory. Instead of approaching, challenging, and testing assumptions, patients facing existential crises in this study suddenly let go of everyday reflection itself. This certainly was not a matter of giving up, or becoming too tired to think or speak. To be specific, it appeared to be a process of actively releasing versus locating and grasping for a newly revised meaning. The second existential dimension is arguably an outcome of the first. Rather than learning from experience, a tenet of Dewey's (1938) that is deeply embedded in Transformative Learning Theory, patients dropped into a process of mindfulness concerning the present moment. This study provides evidence that these patients moved into a quality and capacity of awareness free from the tugs of past experience and future worries. This author experienced patients as becoming perfectly still and vividly present in the moment, often topped with laughter that to the naked ear, seemed to have no origin. The final existential dimension suggested by this study is a process of finding an authentic felt encounter with peace and rest. In sum, patients followed a pattern of releasing reflection, falling into awareness, and experiencing something altogether non dérange.

In large part, as the study commenced patients focused on depictions of physical and emotional suffering. Patients concentrated primarily on their inability to engage in daily activities. Patients suddenly faced with terminal illness, like those in this study, are often jolted by their grave prognosis into a confining space for reflection, which tends to their firsthand experience with physical and emotional suffering. For instance Willow, a middle aged woman diagnosed with end-stage cancer, shared that she had spent most of her life struggling and often failing to be in control. Willow reported that she now found herself in a physical condition that limited control more than ever (Brendel, 2009). Patients in this study were preoccupied with important physical limitations and pain, including loss of sensation, hearing, strength, control, and agency. Patients also focused on struggles with relationships with family and friends who doubted their illness, abandoned them, or stood by their side. These issues are critically important everyday issues for the terminally ill.

As patients moved into examining their narratives, they experienced a sense of control, insofar as their ability to reflect on something very familiar - themselves. It seems that they developed a semblance of confidence and control, which could be described as an existential form of defiance against those who had left them for dead. Among those who left these patients for dead were the patients themselves. Through the lens of Transformative Learning Theory, it becomes clear that because narratives tend to be so identity-focused, they lend themselves to elevating an individual's sense of self to a more comfortable, workable, and even empowering level. After telling, reflecting, and retelling their narratives, a pattern became observable across all four cases: (1) Release from Reflection (2) Falling into Awareness; and (3) Resting in Peace. The remainder of this paper is dedicated to describing these dimensions through patient and caregiver descriptions, and this author's firsthand observations.

Release from Reflection

If narrative was the soil, dialogue with patients nurtured noticeable stalks of silence. Patients were present and conscious, and in fact appeared to be more awake than usual, their eyes physically widened. These rests in speech grew longer and more frequent. It seemed as though patients were making their own leap into 'what is', versus what used to be or what ought to be. Patients also no longer felt 'left for dead', but rather the everyday was left for dead by them, as captured by Huxley's remark, "I consider this a fake life, not the true life… we're only here temporarily" (Brendel, 2009). This remark was followed by a deep sigh and prolonged silence, not as though Huxley was shutting out the everyday, but rather releasing it. The tension in his face dissolved, suddenly revealing a half smile.

Emerson also demonstrated this sudden contempt around his relationship with the everyday, stating "We buy things. We cover ourselves with junk, and then it becomes just that, garbage. So when we learn that the only thing that is really valuable is one self, one's inner self… everything else becomes secondary" (Brendel, 2009). What is interesting here is not what was said, but rather what was not said. In between a particularly long pause, Emerson shared "We are here as a gift, and in the meantime, the spirit leaps and our souls go to heaven, just like water evaporates. We move into the everlasting" (Brendel, 2009).

Marietta, an 80 year old Sicilian and great grandmother living in the Bronx, with the reputation of family matriarch and primary consult over all important matters, from spending, to marriage and even divorce. Marietta's sense of self throughout life was one of leadership, decision making, and reverence. When she became bedridden she was more than frustrated with her inability to deal with these matters effectively and was mostly disturbed with her inability to operate in the simplest of matters such as standing and walking. She shared that this friction was disgusting and lacking of any inspiration. However, after sharing her life history and present narrative, Marietta had suddenly released her sense of self - that of family chieftain - into the hands of her daughter. Her daughter joyfully spoke about this change, or release of reflection about everyday matters, in her mother, "She had a lot of anger and resentment. She has now let go of that anger and resentment and is so grateful for every minute we have together and grateful to the point where any little thing I did she would hug me and compliment me, which I wasn't even used to… we would clash at times and now we don't argue any more" (Brendel, 2009, p. 228). Later, Marietta added, "There was a time I used to have no silly laughter. But, I don't know, now I'm very comical, laughing and smiling" (Brendel, 2009, p. 248). Laughter can after all be a hallmark of deep release. These statements, and observable moments, indicated a break from reflection that produced something greater than transformative learning. Patients like Marietta had transcended the fetters of their lives.

Perhaps there was no more vivid a release from reflection upon the everyday, than by Willow. In this author's dissertation, Willow's spiritual suffering was greater than her physical, "In the spiritual sense, where the ultimate meaning of one's life enters reflection, Willow experienced an observable existential crisis. She was in a word, torn. She would often stop mid-sentence as if she was literally being torn in half from the overarching difference between the life she espoused and the life she had lived" (Brendel, 2009, p. 131). Willow expressed living a double life that was torn between her religious beliefs and her proclivity toward harmful behaviors. It seemed that the impetus for Willow's release was similarly a rejection of any process to make sense of dying at all, "What do you want me to say? I spent most of my life trying to be in control - and just wanting to. I guess I'm not. Yeah I'm struggling with it. Yes, I get very, very frustrated" (Brendel, 2009, p. 149). With every visit, it seemed that symbolically Willow was divesting herself of the artifacts of everyday life. The scarf that covered her bald head disappeared during a subsequent visit, and then her eye-patch, and then there was a notable change in body language, a release. Willow would sit in increasing silence in each visit, and as a researcher this author learned to learn from these moments of release. Toward the end of our protocol, Willow shared, "I decided that I'm just going to be me. I'm going to talk about how I really feel… it feels good, it feels liberating" (Brendel, 2009).

Falling into Awareness

Ralph Waldo Emerson once wrote, "We know that the ancestor of every action is a thought. The poor mind does not seem to itself to be anything unless it has an outside badge. The rich mind lies in the sun and sleeps, and is Nature. To think is to act" (Needleman, 2008, p. 107). Perhaps just as well, the ancestor of every thought is awareness. Patients in this study directed themselves in and out of a place of quiet, separate and distinct from their everyday pain, suffering, attachments to the past, and worries concerning the future. With each deep breath followed by pregnant pause, with eyes closed and relaxed countenance, all of the patients in this study seemed to step outside of time, every now and then, to simply be aware of 'all that is.' Patients were also able to see, in a sense, how everything is connected. Emerson shared, "Everything has consequences. When you throw a rock in it causes the ripples. A bird flapping its wings moves the air. It causes the air to move. The air doesn't move by itself. Everything has a consequence and everything you say and do now will mold the ways and pave the ways to tomorrow" (Brendel, 2009).

When patients returned from this quiet place between reflections it seemed clear that not only had they let go of their anguish, but they articulated the illusion of the everyday, and praised the beauty of the moment. Emerson pondered, "Some people live and they just are miserable. Every day is hell for them. Every day is a struggle… Living should be beautiful. You should enjoy what you eat, making love, huh?" (Brendel, 2009)

Resting in Peace

Coming to terms with ourselves might sound like a feat fit for a thousand lifetimes. After all, in the everyday it seems that there is always room for more critical reflection. In fact, one might argue that tireless reflection of this sort only yields a multiplicity or fragmentation of the self. Shining light on our assumptions is certainly an important and necessary way to function in the everyday, but most indications from this study suggest that they may be causing a deeper cancer upon our authenticity. This type of stance, which we may be inclined to toss to philosophers, is critical to our understanding of transformative learning.

The greatest teachers regarding these dimensions may be the terminally ill who answer an existential calling to relinquish 'everydayness' for a singular, awakened, and unadulterated sense of being. Take for instance Emerson's account of this multiplicity, "You know, you are here to be tried, in many ways. You are tried by yourself, you are tried by your partner, your coworkers, different situations, but mainly by yourself. And you have to fight with yourself, your inner selves… the outcome of that struggle is what makes you stronger or weaker in life. And whether you move on or do it all over again is up to you. The choice is yours. Only you can work on that… that's how you come to terms with yourself" (Brendel, 2009, p. 212).

As this author concluded his study, it seemed a good time to find closure with the patients whom he had sat with for hours at a time. Though the personal experience of 'goodbye' was expected to be the stuff of sadness and grief, for patients it was surprisingly serene. Patients, now having released the world itself in their own unique ways experienced our departure peacefully and with a great sense of love and gratitude. The final gaze between researcher and participant was immersed entirely in the present moment. The phenomenon that this author experienced was not the one that he had prescribed, but rather it was a moment of time free from worry. It was a moment in time of sheer being and rest. After concluding the study, this author read *The Death of Ivan Ilyich* by Tolstoy (1886). The central character had been consumed throughout his time on earth with the everyday until the very final moments of his life, when he had experienced this same quality of peace:

And suddenly it grew clear to him that what had been oppressing him and would not leave him was all dropping away at once from two sides, from ten sides, and from all sides… 'And the pain?' he asked himself. 'What has become of it? Where are you, pain?' He turned his attention to it. 'Yes, here it is. Well, what of it? Let the pain be. And death… where is it?' He sought his former accustomed fear of death and did not find it. 'Where is it? What death?' There was not fear because there was no death. In place of death there was light… 'Death is finished' he said to himself. 'It is no more!' (Tolstoy, 2010, p. 48).

Conclusion

Dr. Bruce Kramer, the Dean of my college, was recently forced to step down from his post due to advancement in his own terminal disease, ALS or Lou Gehrig's Disease. In this particular illness the body shuts down rather quickly while the mind stays as sharp as ever. Recently Dr. Kramer shared in his blog, "in the past month, I missed the beauty of life lived in the moment, because I existed in the future. I missed subtle hints of physical loss that left me surprised, angry and humiliated as they were suddenly realized. I missed knowing the last time even when the last time was screaming in my face. And when the last times came, I was so focused on the final ending, I missed their beginnings" (Dis-Ease Blog Post, Kramer, 10/8, 6:46AM, 2012). It may be that no process of critical reflection ever leads to a state devoid of problematic social constructs - those very same constructs which critical reflection seeks to cure. We need not be terminally ill to begin exploring our capacity to transcend our own narratives and develop a new relationship with our own existence. We can in this very moment give ourselves existential permission, as did the patients in this study, to let go of our reflections, fall into a less contaminated quality of awareness, and rest in a state of being beyond the problematic constructs we create for ourselves. This author believes that this is the place where, as demonstrated by these four patients, we may rediscover compassion, faith, humor, love, and hope.

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Silenced Voices That Cry In the Night: Transformative Learning and Spouses of Wounded Warriors

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Abstract

This phenomenological dissertation study seeks to gain an in-depth understanding, or the essence, of the learning experience and meaning making process of young, ethnically diverse female spouses of wounded warriors* who have transformed their world view from dependent wife to head of household as a result of significant injuries their soldiers sustained fighting the War on Terrorism. The theoretical framework lay at the intersection of adult learning theory, in particular transformative learning, and women's adult development. The study will be conducted through a feminist lens to better understand the ways in which women know, learn and thus transform their perspectives.

Key Words

Transformational learning; Women's Development; Feminism; Wounded Warriors; Army Spouses

"The basic dimension of human prospect are survival and transformation …and the two dimensions, are inextricably intertwined" (Kothari, 1988, p. 20). The words of Kothari so resonated with me after a conversation I had with a young female intern that it compelled me to think about that discussion for this dissertation. Let me explain.

Motivation for This Study

After speaking to a class of 130 junior government employees, one of the young women asked to speak with me in private. She shared her personal story of transformation from a 'young, dependent wife' to 'head of household' caring for a soldier wounded in the Global War on Terror (the War) and no longer able to work full time. We talked about how she has had to learn (and is still learning) to become independent, how she sees the world differently but how so many, both inside and outside of her organization, still viewed her as just a "young, dependent spouse." We talked about ways to overcome this perception and I provided her with some strategies that had worked for me many years ago as a young Army spouse in charge of my household during years of long separation of my soldier and his eventual death. As I traveled home, I could not help but replay her story of transformation over in my mind. I was intrigued as it mirrored much of my own. As an educator and former military spouse, the transformative learning experience of these courageous women became an area of renewed interest and the focus of my dissertation.

Research Purpose and Main Question

Our military service members represent only 1 percent of our population, but they shoulder the responsibility of protecting our entire Nation. To date, according to the Iraq Coalition Casualty Count (ICCC, 2012) close to 1.7 million troops have served in Iraq or Afghanistan since September, 2001. The ICCC further reports as of May 2012, there have been 6382 confirmed deaths of U. S. servicemen and women and more than 420,000 wounded in action. Improved body armor, explosive resistant vehicles, the enormous progress of battlefield medicine and more advanced care at military treatment facilities havecreated an unprecedented situation in which warriors who would have died in all previous wars from their injuries now survive. As such, "...more troops are returning home severely wounded, with injuries that require lifelong care and cost millions of dollars in medical bills" (Wood, 2011). The injuries sustained by these soldiers have affected thousands of families. The spouses of our wounded warriors shoulder a elevated level of spousal responsibility. For many of these young spouses (primarily female), transforming their world view as a result of the traumatic injury experienced by their soldier is the first step towards a strong family foundation that can support changing roles and responsibilities.

To that end, the purpose of this study is to gain an in-depth understanding or *essence* (Creswell, 2007) of the learning experience and meaning making process of young, ethnically diverse female spouses of enlisted soldiers who have transformed from *dependent wife* to *head of household* as a result of injuries (traumatic and/or debilitating; visible or not) their soldiers sustained fighting the War. I am also interested in how these women make sense of their new perspective and how society can better support them. The overarching research question that underpins this study is: Using transformative learning and women's way's of knowing as a theoretical framework for inquiry, what is the overall essence of the learning experience of being transformed from dependent spouse to head of household? Additional sub questions will also be examined.

Research Paradigm and Design Overview

The theoretical framework lays at the intersection of adult learning theory, in particular transformative learning, and the feminist theory of women's adult development. Transformational learning theory as presented by its chief architect, Jack Mezirow, posits that significant learning in our lives involves meaning-making that can lead to a transformation of our personal or worldview (Merriam, 2006). I will underpin the study with a feminist lens to better understand the ways in which the women learn and thus transform their perspectives. A feminist approach to knowledge building recognizes the essential importance of examining women's experiences by women (Hesse-Biber, Leavy, Yaiser, 2004). Research that uses a feminist lens is research that is informed on the current and former status of women in society (Bierema & Cseh, 2003). It allows the researcher to look at the world from a woman's perspective honoring the common experiences and histories (Bierema & Cseh).

This qualitative study will use the hermeneutic phenomenological methodology. An early feminist assumption is that research relationships were to be constructed as collaborations (Cook & Fonow, 1986). Hermeneutic phenomenology best supports this assumption because it allows the researcher to dialogue with participants in order to describe the human experience that shapes their meanings. Hermeneutics "is grounded in the belief that the researcher and the participants come to the investigation with forestructures of understanding shaped by their respective backgrounds, and in the process of interaction and interpretation, they cogenerate an understanding of the phenomenon being studied" and thus allows the "voice" of the participants to heard …(Creswell, 2007, p. 22).

Theoretical Constructs of the Study

Transformative Learning

Mezirow introduced the concept of transformative learning in 1978 in his groundbreaking study of women who returned to community college to continue their education. As their understanding of personal, cultural, and social histories grew, so did the students' ability to modify their assumptions and expectations of learning. Transformative learning is founded on a *perspective* view of the learning process. Perspectives are the beliefs, values, and assumptions that develop through one's life experience and it is through *developed perspectives* that one is able to interpret and to make meaning of those experiences (Mezirow, 1991) to gain greater control over their lives as socially responsible, clear-thinking decision makers (Mezirow, 2000); it represents a sharp departure from what many practitioners have traditionally held to be the aims and processes of adult learning (Dirkx, 1998).

Transformative learning is rooted in the belief that true learning is initiated by a disorienting event and is realized through the conscious reflection of the assumptions surrounding the learner's beliefs, feelings and actions. The disorienting event can be as subtle as a beautiful sunrise (Cohen & Piper, 2000) or as a result of an acute personal or social crisis such as a natural disaster, the tragic death of a loved one, divorce, a debilitating accident, war, job loss or retirement (Taylor, 2008); very similar to the experiences of the women in this study. These experiences are often stressful and painful, and they can cause individuals to question the very core of their existence (Mezirow, 1997). Central to Mezirow's theory is rational discourse and critical reflection, both of which focus on the individual learners' ability to think about the learning experience, making sense of self (Stewart, 2008) as well as making sense of the world. This theory emphasizes the importance of the learning journey and is not simply focused on an end-point result; as such it occupies the center of the adult learning literature (Merriam & Caffarella, 1999).

Feminist Theory - Women's Ways of Knowing/Learning

The second body of theory that grounds this study is feminist theory. Feminist theory deals with feminist perspectives and varieties of feminism, ways of being and doing [and learning] which demands a significant shift in women's outlook and behaviors (English & Peters, 2012). Feminist theory, which emerged from the feminist movements, aims to understand the … women's social roles and lived experiences (Chodorow, 1989; Gilligan, 1977, 1993) and is most recently having an even stronger impact on adult learning theory (Merriam, 1996).

Feminist pedagogy is specifically concerned with "(1) how to teach women more effectively so that they can gain a sense of their ability to effect change in their own lives, (2) an emphasis on connection and relationship (rather than separation) with both the knowledge learned and the facilitator and other learners, and (3) women's emerging sense of personal power" (Tisdell, 1993, p. 93). The seminal work in this area streams from scholars Belenky, Clinchy, Goldberger, & Tarule (1986) who interviewed a diverse group 135 women, with a focus on identity and intellectual development across a broad range of contexts. Their work is referred to as the women's development theory. The scholars put forward that:

Relatively little attention has been given to modes of learning, knowing, and valuing that may be specific to, or at least common to women. It is likely that the commonly accepted stereotype of women's thinking as

emotional, intuitive, and personalized has contributed to the devaluation of women's minds and contributions, particularly in Western technologically oriented cultures… (Belenky et al., p. 6)

The scholars identified 5 "ways of knowing" or knowledge perspective areas that represent a different point in women's cognitive development, depending on concepts of self (self), relationship with others (voice) and understanding of the origins and identity of authority, truth and knowledge (mind) (Belenky, et al.). They defined those five epistemologies as "silence, received knowledge, subjective knowledge, procedural knowledge, and constructed knowledge" (Belenky, et al., 1986, p. 15) – an important element of the transformative experience.

Feminism sparked interest in women's ways of knowing [and learning] (Hayes & Flannery, 2000). Approaches … such as "connected knowing" are believed to be particularly characteristic of women's learning. A key assumption that underlies the study of women's transformative learning is that much can be learned from the stories of women (Jones-Ilsley, 2011). Writing in this area embodies a psychological, sociological, and critical dimension (Merriam, 1996). The psychological focus, or what Maher (1987) terms "gender" model, is concerned with the development and personal empowerment of individual women. The sociological or "liberatory" model is anchored in an analysis of the structured power relations of the larger society that have resulted in women being an oppressed and marginalized group. Both perspectives are critical in that women's experiences and women's modes of learning are critically assessed at both the individual and societal levels (Merriam, 1996).

Integrating Feminist Pedagogy with Transformative Learning

Beyond the fact that Mezirow's (1978) empirical work started with women returning to college …neither his deliberation on that study nor his more recent work have focused specifically on women (Irving & English, 2011). And while research has been conducted on the concepts of transformative learning (Belenky & Stanton, 2000; Mezirow, 2000; Taylor 1997) and the practical application of the theory (Cranton, 2006), a review of Mezirow's research revealed that little consideration has been given to how factors of race, gender, ways of knowing, and context influence the development of revised perspective views in adult learners (Hayes & Flannery, 2000; Irving & English, 2011). Gilligan (1985), based on series of studies on women's development and transformative learning conducted with female populations, determined that many of the existing theories of transformative learning had evolved from a generalization of Western, White, male learning experiences to dissimilar populations. Several of the widely accepted transformative learning theories have overlooked the specific learning experiences of minority groups and women and the manner in which socially assigned roles and existing self-perceptions have contributed to the development of revised perspective views (Kairson, 2009).

The integration of the transformative learning construct viewed through a feminist lens does not ground the study in the view of the woman as being oppressed but, instead, draws its ideas from the aspects of a woman's relational sense of the world and her ability to express and live by her emotions more freely than men (Maher & Tetreault, 1996); advocates challenging the contemporary, exposing new assumptions, revealing illusions and questioning traditions (Bierema & Cseh, 2003), making meaning of transformed perspectives (Mezirow, 2000). The integration of dual perspectives supports my goal "to produce non-hierarchical, non-manipulative research relationship…between the researcher and researched" (Cotterill, 1992, p. 594). The individual strengths of each theoretical perspective offsets the limitations of the other (Shaw, 2001), thus providing a more thorough and in-depth theoretical base for this study.

Population / Sampling Strategy

The population for this study is limited to 10 to fifteen ethnically diverse, working spouses of enlisted wounded warriors, ages 18-25. The rationale for selecting this population is twofold. First, these spouses historically have had less access to resources and are often an invisible and underrepresented group (Harrell, 2000); their voice virtually *silent* in the literature. Second, this is a population, as an emerging researcher, I have worked with and feel I can write about with some level of authenticity

For this study, a purposeful sampling procedure will be employed; the level of analysis will be at the individual level. In qualitative research, only a sample (that is, a subset) of a population is selected for any given study (Mack, Woodsong, MacQueen, Guest, & Namey, 2005). Purposeful sampling is used in qualitative research (Creswell, 2007; Lincoln & Guba, 1985; Mack, et al., 2005; Miles & Huberman, 1994) using a phenomenological methodology. In a phenomenological study, the participants must be individuals who have all experienced the phenomenon being explored and can articulate their lived experiences (Creswell, 2007). Purposeful sampling, according to Mack, et al., (2005), groups participants according to preselected criteria relevant to the research question.

To further enrich the information, the purposeful sampling that will be used for this study is critical case sampling. Critical case sampling, as defined by Patton (2001) allows the researcher to sample those individual who can "make a point quite dramatically" (p. 236) and thus are rich in information. Within the community of wounded

warriors, many continue on active duty and thus retain the role of head of household. With the injuries come different levels of spousal support. The sample approach for this study is to select women who most typify having made a transformation from dependent spouse to head of household because their wounded warrior's injuries would not allow them to continue in this role and to more fully understand their transformative experience. Because the community of spouses of wounded warriors tend to be interconnected, snowball sampling, a type of purposeful sampling that occurs when participants with whom contact has already been made use their social networks to refer the researcher to other people who could potential participate in or contribute to the study will be used primarily to find and recruit "hidden populations," that is, groups not easily accessible to researchers through other sampling strategies (Mack et al., 2005, p 6). Thus critical case and snowball purposeful sampling strategies will be employed for this study.

Summary of Methods (Instrumentation, Data Collection, Analysis Steps)

Based on the nature of this study, three primary collection strategies will be used: Pre-interview questionnaire, focus groups, and personal interviews using a modified two-series interview as suggested by Seidman (2006). Three collection strategies were selected because, according to Bloomberg & Volpe (2012) "the use of multiple methods of data collection to achieve triangulation is important to obtain an in-depth understanding of the phenomenon under study" (pp. 107-108).

Wojnar (2007) proposes that the goal of hermeneutic inquiry is to identify the participants' meanings from the blend of the researcher's understanding of the phenomenon, participant-generated information, and data obtained from other relevant sources. To analyze the data and share results, I plan to use a general process devised by Diekelmann, Allen and Tanner (1989) based on the Heideggerian beliefs. Their seven step process is as follows:

1. Read the interviews to obtain an overall understanding
2. Write interpretive summaries and coding for emerging themes;
3. Analyze selected transcripts as a group to identify themes;
4. Return to the text or to the participants to clarify disagreements in interpretation and writing a composite analysis for each text;
5. Compare and contrast texts to identify and describe shared practices and common meanings;
6. Identify patterns that link the themes; and
7. Elicit responses and suggestions on a final draft from your team and from others who are familiar with the content or the methods of study (Wojnar, 2007, p. 177).

Conclusion

The women's stories will be captured through individual interviews and highlighted for the reader to ensure a thick, rich description of the phenomena. Adding the lens of feminism ensures a focus on research with an overriding importance of meaning making and context in human experiencing (Mishler, 1979).   My goal for this study is o add to the ongoing conversation by giving voice to the experiences of women usually unheard in theories of learning (Lather,1992) while simultaneously challenging the status quo and identify fruitful directions for future studies (Gersten, 2001). Knowing some common experiences can be valuable for groups such as therapists, teachers, health personnel and policymakers (Creswell, 2007).

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Community leadership: Transforming our models and ourselves

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Abstract

The purpose of this interactive session is to explore participants' models of community leadership, present the frameworks of emerging theories on leaderless community organizing and Collective Impact, make connections to transformative learning processes, and develop plans for participants' learning and action. This paper outlines how the approaches of leaderless organizing and Collective Impact open spaces for transforming our worldviews and the ways we take action to create a more just and sustainable world. Through the processes of co-authoring, including previously excluded voices, seeking more equitable participation, and speaking truth, participants' worldviews and organizations' ways of being can be transformed.

Keywords

leaderless organizing, collective impact, leadership models, social movements, individual and collective transformative learning

Introduction

In many countries, we have approached community problems and injustices with top-down responses. We look to government agencies or nonprofits/NGOs to develop approaches to poverty, joblessness, hunger, and other inequities. While these efforts have had some success, they are often ineffective when they impose one-size-fits-all and fragmented solutions to parts of complex problems that differ by context. In addition, the increasing gridlock in federal and some state governments in the United States, combined with dominating influence by corporations of those governmental structures, render them incapable of addressing pressing social, economic and environmental issues. Effective action requires new approaches to social movement organizing and the collective work of community-based organizations. Solutions to these limitations posed by the current paradigm offer fertile ground for transformative learning both at the individual and collective scales.

Leaderless organizing

Starr (2005) describes many actions taken during the 1980s and 90s that led up to what is often pointed to as the beginning of this organizing approach in the United States: the protests against WTO in Seattle in 1999. Juris (2008), Juris and Pleyers (2009), and Feixa, Pereira, and Juris (2009) have studied European and US protest movements embodying this approach. Nichols (2012) and Van Gelder (2011) have documented protest movements in Wisconsin in spring 2011 and the Occupy movement that started in fall 2011. The World Social Forum and United States Social Forum gatherings (Biagiotti, 2004; Smith & Juris, 2008) are excellent examples of this approach as a proactive strategy. Ross has articulated the approach more broadly in *The leaderless revolution: How ordinary people will take power and change politics in the 21st century* (2011).

While these forms of organizing build on older approaches, this new approach has several distinctive characteristics. Individual and small group actions are starting larger collaborative processes in more bottom-up ways than in the past. These approaches use participatory decision-making in an effort to live out the change they wish to see in the world rather than using hierarchical models to bring about democratic processes. Many of the movements are trying to involve those most affected by issues and develop solutions with the active participation of those affected. Actions proposed recognize and try to address the complex nature of social change processes, through which actions co-create a new reality that must constantly be analyzed and actions shifted accordingly. This approach also recognizes that actions for social justice must be taken on many levels of the different systems that make up social, economic, and environmental processes. The old solutions won't work and new approaches must be created as we go. Leaderless groups are making effective use of communications technologies that enable coordination of efforts locally and globally and facilitate democratic decision-making. Finally, leaderless approaches are seeking the coordination of many current group efforts around specific events and processes without requiring complete alignment of groups' missions and goals. While there are still conflicts within this process, strategic collaboration can help groups advance toward shared goals.

An example of a movement that embodies this approach is the food movement. While many people have been working to develop a more sustainable, healthier, and more equitable food system globally, no one group from

the top got all the local efforts together. But communications technologies and a systemic or complexity thinking perspective enabled groups working on diverse aspects of the system to coordinate their efforts and articulate visions for the future. Town halls were held in many US cities to gather input on what the new farm bill should include. Farmers are actively involved in developing farm markets and community-sponsored agriculture programs. The number of farm markets has increased from fewer than 2000 in 1994 to almost 8000 (USDA, 2012). The number of community gardens has soared and is now estimated at 18,000 in the United States (ACGA, 2012). Internet recipe sites are credited with encouraging people to buy locally-grown, in-season ingredients that are more flavorful and don't need as much seasoning. Groups are working to stop corporate control of seeds globally and the damaging effects of trade agreements on farmers in the global south. These movements involve farmers, nonprofit organizations, and solidarity groups in the countries writing the trade agreements. This represents a substantially new approach to addressing food issues that looks and acts systemically, happens organically through individual and small group initiatives, collaborates actively through local face-to-face and global on-line forums, and is co-creating a new food system.

Collective Impact

Collective Impact is a programmatic and evaluative approach geared toward addressing complex and integrated issues through coordinated efforts of multiple 'players' such as nonprofits/NGOs, government agencies, and private organizations (Hanleybrown et al, 2012). As first outlined by Kania and Kramer (2011), Collective Impact approaches are often coordinated around a common agenda, shared measurement, mutually-reinforcing activities, continuous communication, and backbone support.

In the fall of 2012, the Stanford Social Innovation Review published a piece entitled "Q&A Roundtable on Collective Impact" that highlighted a dozen social sector leaders discussing this approach. The impetus for Collective Impact, they suggest, is that many community-based practitioners are coming to understand that, while individual organizations may be having significant impact on particular issues, progress toward addressing complex community-scale issues is limited. In response, a Collective Impact approach begins by bringing together multiple players (diverse voices) who share commitments to particular complex community issues. Relationship building is a necessary first step to establish the trust and understanding needed for co-authoring a shared agenda and shared measures. Part of this involves creating conditions in which participants feel safe enough to be vulnerable. At an organizational scale, this means being willing to show up at the table and honestly reflect on what is not working: "Vulnerability is a big part of the process, being able to admit what you are doing hasn't worked…that vulnerability takes that power dynamic and turns it on its head" (Schmitz in Nee & Jolin, 2012, p. 26). Crafting a shared agenda and shared measurement is work that is done in an integrated way, informed by the questions "what is the change we seek- collectively? And…how do we get ourselves there-collectively?"

Another step in the Collective Impact process is for multiple players to begin to look at the work together from a systems perspective. This lens is important in considering complex issues that may have many interrelated and/or competing social, economic, and environmental dimensions: "One reason why 'authentic' community participation is hard to do is that the complexity happens at the community level…What makes the process authentic is that the participants in the collective impact initiative are willing to hear how complicated the problem is" (Murphy in Nee & Jolin, 2012, p. 27). A systems perspective can build understanding of how all the players are, or could be, in relationship to each other. As the group begins to consider mutually –reinforcing activities, it is important to know what each player contributes distinctly, and how that contribution can be leveraged or built on by others. Creation of a shared agenda does not mean that each player works on the same thing, rather that each brings a unique capacity, perspective and niche that contribute to the greater whole. Additionally, those most directly affected by the issue are right there at the table, speaking from their lived experience. Mapping the work from a systems perspective can also reveal gaps in programming, representation, and resources.

One of the key ways people engaged in Collective Impact work can intentionally build in processes that facilitate learning is through the application of Developmental Evaluation. This approach is best used in contexts of innovation, such as the forging of new understandings and constructs emerging from co-conceptualization of issues and solutions:

Developmental evaluation supports innovation development to guide adaptation to emergent and dynamic realities in complex environments. Innovations can take the form of new projects, programs, products, organizational changes, policy reforms, and system interventions. A complex system is characterized by a large

number of interacting and interdependent elements in which there is no central control; self- organizing and emergent behaviors based on sophisticated information processing generate learning, evolution, and development (Patton, 2010).

Transformative learning processes

We are addressing these two approaches together because they are emerging as powerful new ways to build more equitable, sustainable, and just social, economic, and environmental systems. Both require and provide multiple opportunities for transforming ourselves, our world views, and the models with which we lead in community organizations. We draw on our understandings of Transformative Learning Theory which suggest that collective work and action can be powerful sites for both individual and collective transformation (Cranton, 2006). Additionally, grass-roots sites of action offer opportunity for learning and growth relative to the act of re-claiming and restoring the well-being of our communities.

For those of us who grew up in an era where government was expected to address most social problems, we have to undergo a shift in thinking about who is responsible and in what ways for building a better world. "A new way is possible, but it has to be enacted, not asked for" (Ross, 2012, p. 26). As we see the failure of top-down, patriarchal and privileged people's solutions, we have to shift out of comfort zones of "doing for" to "dialogue with" and the creation of approaches that involve those most affected.

Leaderless organizing and Collective Impact are compelling to us not just in their potential for engaging people in meaningful community change, but in the ways they interrupt current approaches that result in limited or fragmented impact. Both approaches tend to be employed in response to an honest assessment and acknowledgement of the limitations of individual efforts working to address complex issues. They are both dependent on engaging the strengths and perspectives of equally important and diverse players in service of a larger and shared vision. Both seek ways to integrate and coordinate those diversities in synergistic and multiplying ways.

The process of co-authoring: organizing around and crafting a shared narrative, plan of action, and vision for change, holds potential for transformative learning to occur. This can happen as a result of people and organizations that have not typically come together, doing so, and in a way in which each 'voice' is equally essential. Think of it like a piece of jazz music… each instrument brings a unique 'voice' that contributes to the whole. Without each voice, the piece would not be the same. In this context, dynamics of power and the politics of knowledge can be re-framed toward ones of greater mutuality. For example, organizations employing a Collective Impact approach in community and local food systems work would seek to bring together those who have great influence on food access and distribution (e.g., Wal-Mart) with those who have limited user/consumer power (e.g., families living in urban 'food deserts'). The process of these diverse voices coming together to identify a shared agenda, shared interests/commitments, and desired impacts offers opportunity for deep and transformative learning. This can occur through relationship building and coming to 'know' someone else's reality, and through the negotiation of multiple 'truth' or knowledge claims being equally valid. With both leaderless organizing and Collective Impact, the implementation of a shared agenda offers opportunity for embodied knowing as partners start to interact within and alongside each other's worlds. In most cases, that interaction involves standing in the paradoxes that present when one's understanding of the world seems to contradict that of another. Traveling within and alongside another, or group of others, is likely to involve disorienting dilemmas (Mezirow, 2000). Herein lies opportunity for wrestling with complexity, ambiguity, and new ways of seeing the world (Alhadeff-Jones, 2012).

Additionally, the practice of 'speaking the truth' can have transformative potential. Since a starting point for collective action can be recognition of what has not worked through individual efforts, this can throw into question deeply held beliefs and assumptions upon which programming is built. Honest critical reflection on personal worldview or programmatic/organizational 'theory of change' can lead to new perspectives about what variables are important in bringing about desired change. Collective planning and action create opportunities for participants to both embrace each other's convictions as well as let go of some of their own, and it is through this that deeper, more complex understandings are built.

"People have spoken about speaking truth to power, but one of the things the council saw in the case studies we examined is that what people first did was speak truth to themselves" (Stonesifer in Nee & Jolin, 2012, p. 28). Lastly, the intentional sharing of and building upon different ways of thinking, framing, interpreting… lays ground for the construction of new knowledge that is both embodied and intellectual. The degree to which we seek

to understand this construction in a metacognitive way, contributes to the ways in which our understandings of our own thinking and knowing are transformed.

Following Davis, Sumara and Luce-Kapler's (2008) conception of groups of people as learners, we see that these same processes of co-authoring and speaking the truth can operate at the collective level and result in groups learning and enacting new ways of being. Understanding social systems as complex systems challenges mechanistic models that have guided many organizations' approaches to social action. A complexity perspective both requires and enables us to develop actions rooted in specific contexts and to conceptualize the processes of social action as co-emergence, or the process of co-creating reality through the interactions of organisms and their environment. Two major shifts in society that are intertwined with this new consciousness are examples of how significantly the contexts for social action have changed. The first is the new communications technologies that connect people and can be used to share information rapidly around the globe. These technologies have changed the ways groups can collaborate and the ways information about events can be shared (e.g., news of specific protest actions during the Arab Spring were shared directly by participants with people around the globe). As a result, the political and rhetorical arenas for social action have changed dramatically. Another significant shift is the challenge to public institutions and representative forms of government.

Emerging from many movement activists is an alternative vision of politics, one that is based on direct participation and that rejects 'taking' power in favor of a networked politics where activists embody in their practices the type of society they want to create within a democratic civil society. (Smith et al, 2007, p. 9)

These two societal shifts are examples of how dramatically the changes in our time are and why significantly new approaches are required. Old ways of addressing social issues are unlikely to be effective in this new context. This means that creating effective actions can happen best in the collective, inclusive, dynamic, and honest processes described above. Given the degree of change required to imagine and embody new approaches, we see the learning processes involved as fertile ground for collective transformative learning.

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Walking Between Worlds: Holding Multiple Worldviews as a Key for Ecological Transformation

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Abstract

We are experiencing both outward and inward collapse. Embracing the ecological and social crisis provides opportunity to enlarge our perspectives in a way that aligns with larger systems of life opening one up to what has been called the multicultural self, the ecological self, or the self-transforming self. These concepts demonstrate that when a person can navigate more than one worldview or identity, one is more resilient and responsive. This presentation will identity six qualities of people who are shifting to a resilient worldview, explore expanded concepts of self, and will include an experiential exercise and dialogue.

Keywords

Ecological and social crisis, multicultural self, ecological self, self-transforming self

Introduction

As our world is caught in the sobering realities of the ecological crisis including social injustice, there is growing need for tools to foster transformation. We are experiencing the outward collapse of human and natural systems and concurrently many are experiencing profound personal crises. On a collective level, particularly within the U.S., there seems to be a general apathy in engaging our ecological and social crisis. There is a psychic numbing where looking at these complex issues is too overwhelming and many would rather stay in a more comfortable view of the world. In terms of the ecological crisis and transforming our worldviews so they are resilient rather than closed, a person with a resilient paradigm understands that the living world is much more than material resources – earth systems are alive, conscious, and dynamic. It depicts a person who is living in relationship to the planet, both humans and other living beings in life affirming ways and is willing to change her ways of thinking and acting in order for this relationship to thrive.

How does one shift to a life embracing, resilient worldview? In a research project, I identified six qualities shared by people who are making this shift which include (1) relationship with the natural world, (2) spiritual practice, (3) both accepting and feeling despair over the ecological crisis, (4) participating in self-healing, (5) experiencing many challenges to one's worldview that resulted in changing it, and (6) altering one's thought patterns to relational modes. The last two qualities reveal that it is only by going successfully through crisis do we transform our worldviews including our practices. Embracing the ecological and social crisis provides the opportunity of enlarging our perspectives in a way that aligns with larger systems of life. It opens one up to what has been called the multicultural self, the ecological self, or the self-transforming self. Essentially these concepts demonstrate that when a person can navigate more than one worldview or identity, she is more resilient and responsive. This is particularly insightful for people who are living on the edges of multiple identities – walking between worlds.

Groundlessness and Defense Mechanisms

The world is in a state of crisis and constant flux. Globally and locally, we are witnessing the crumbling of economic and political systems; the deterioration of the earth as a result of climate change due to unbridled consumption, overpopulation, and globalized practices of toxic corporations; and multiple forms of social injustice. We are also observing dogmatism with religious, cultural and political alienation. Within the U.S., there is an extreme polarization between political parties that ripples out to the general population. People seem to cling unwaveringly to what they believe and feel is right. What is so disheartening is the energy and results of this dogmatism. It seems to block out seeing what is actually occurring on the large scale. We barely speak of our ecological and social crisis. And should this be surprising? There are so many troubling issues, to look at them, nevertheless try to address them is overwhelming. It is not only the global and outward issues, many of us are mired with personal issues – health, money, relationships, depression, purpose. Most people are seeking some sort of peace, a stasis where life is comfortable, predictable. We do not want to throw our lives into greater chaos and really seeing our global problems creates a risk of groundlessness – all of our beliefs about the world and our lifestyles might fall apart.

We employ various defense mechanisms in order to repress and avoid feelings of pain for our global crises. While defense mechanisms can be healthy in protecting us from falling into severe crisis, in essence they keep us sane. Yet at some point we need to drop our defenses and look at what is happening on this planet and the roles we play in supporting this. Koger & Winter (2010) revisit the classic Freudian defense mechanisms and relate them to the ecological crisis. These include creating rationalizations for our unsustainable behaviors; intellectualizing the issues so we can view them abstractly, rather than feeling them; displacing our feelings by acting out to seemingly unrelated issues and people that are "less threatening", consciously or unconsciously blocking our feelings (suppression and repression), and flat out denying that there is a crisis often with hostility at those who speak of it. While these defense mechanism can be healthy for our short term sanity, they destroy both our and the planet's long term health. Similarly, Macy & Brown (1998) created a list of reasons why people choose to repress (unconsciously blocking feelings) the crisis and the consequences for this repression. The reasons why we shut down our feelings include not wanting to experience despair, guilt, and the gloomy reality we are in; not wanting to seem anti-American, causing others distress, and seeming irrational, emotional, and weak; or simply associating these feelings with personal problems rather than the state of the world. It all seems like too much to hold, so we shut down.

Yet, as transformative learners, we know that a key to unlocking change occurs when a person successfully navigates a disorienting dilemma, where one has an experience that conflicts with one's worldview or frame of reference (Mezirow, 2000a, p. xii). A worldview or frame of reference is compromised of two dimensions, a habit of mind and a resulting point of view. The habit of mind is how one makes meaning assumed from her or his culture and the resulting point of view is how one plays this meaning out in one's daily life (Mezirow, 2000b). I relate the habit of mind with how we think and feel, and the resulting point of view with how this thinking and feeling changes our behaviors, our actions. As a result, one has a choice of ignoring this conflict or to transform her or his frame of reference by either "elaborating existing frames of reference", "learning new frames of reference", "transforming points of view", or "transforming habits of mind" (Mezirow, 2000b, p. 19).When a challenge confronts our established worldviews, we have the opportunity to respond and alter our views so they are more resilient.

Qualities of a Resilient Paradigm

In engaging why some people choose to transform their worldviews in order to respond to our ecological crisis, while others choose to shut down (consciously and unconsciously), I designed a study to gather some key qualities of people who where shifting to a resilient paradigm, one that is awake to and in affinity with the living world. The participants were already situated in work that directly or indirectly focused on ecological issues in a variety of professions. My research revealed the following six qualities of people with resilient paradigms: (1) relationship with the natural world, (2) spiritual practice, (3) both accepting and feeling despair over the ecological crisis, (4) participating in self-healing, (5) experiencing many challenges to one's worldview that resulted in changing it, and (6) altering one's thought patterns to relational modes.

Relationship with the Natural World

The first characteristic, *a relationship with the natural world*, is very straight forward. Spending time in nature instills a relationship with more than human life. This is known as biophilia a hypothesis developed by E.O. Wilson which claims human beings have an emotional connection or affinity for other forms of life (Roszak, 1994). All participants had relationships with the natural world which ranged from appreciative ones to others that were more transpersonal and reciprocal. With those that had the more transpersonal and reciprocal relationships with nature, it seemed clear that they recognized there was a living force within the universe that was greater than humans – a larger consciousness. By opening our self boundaries and connecting to a larger experience and reality, we are deeper informed, supported, and conscious of the regenerative patterns of all of life.

Spiritual Practice

A *spiritual practice* connects with being able to recognize the larger consciousness of the living world as well as having a strong sense of intuition. A spiritual practice is different than having a religion which is often more of a policy or doctrine that is not necessarily a firsthand experience. Spirituality invokes connecting with and having an active, personal relationship with the sacred. All of the participants reported having a spiritual practice ranging from various forms of meditation, Buddhism, nature spirituality (including Christian and Jewish versions), and other forms of transpersonal spirituality. Many of the participants' spiritual practices engaged the natural world. I found it interesting that many of the participants' spiritual connections gave them guidance surrounding the ecological crisis.

Acceptance of and Despair over the Ecological Crisis

The third characteristic, *acceptance of and despair over the ecological crisis*, correlates with the realization that the earth is experiencing a global crisis, having personal experience with feeling ecological despair, and the ability to learn from emotional pain. This characteristic is central to shifting paradigms, for if one never accepts or feels despair surrounding the crisis, one may be in a state of denial or dissociation. Within the inquiry process, an extremely strong theme emerged in response to what participants felt was the purpose of feeling ecological despair. They felt that despair served to communicate the pain of the larger system (the earth) and to spark people to respond, become active, and to create change. Through feeling their despair, the participants demonstrated that they could communicate with a larger consciousness, that of the earth.

The ability to learn from emotional pain also relates to a high level of participants' experiences with personal challenges, even emotional breakdowns, and the transformations and learning which surfaced. It was quite interesting that the sequence of waking up to the crisis, feeling despair, and learning from pain, occurred in various forms for different participants. I had assumed that learning about the crisis, would then result in the pain, and then the learning, yet this was not the case. In some cases, participants felt despair over the state of the earth, prior to fully recognizing the crisis, and in many cases the process of awakening to the crisis and feeling despair stretched over a long period of time.

Participation in Self-healing

The fourth characteristic, *participation in self-healing*, correlated with being self-nurturing, yet not in an egocentric way, as well as engaging in participatory relationships with nature. There was an overwhelming theme with the participants, that ecological healing begins with the self. Many of the participants shared metaphors of hitting rock bottom with their ecological despair as a means to let their former selves die and allow for a new self to emerge. There is a transformative relationship between despair and healing and this idea surfaces within various theorists (Bache 2000, Chödrön 1997, Conn 1995, Glendinning 1994, Greenspan 2003, Macy 1995, Macy & Brown 1998, O'Connor 1995, Windle 1995). All of the participants engaged in some sort of self-healing work whether through therapy, experiences in nature, spirituality, or another form or combination of many forms.

The idea that ecological healing begins with one's self demonstrated a high level of authenticity by the participants. This was not done in an egocentric way where their personal healing took precedence over global issues as, for the most part, participants had consciously chosen to do work to help heal the ecological crisis and their levels of personal accountability across a material, emotional, and spiritual level were humbling. Many of their stories expressed that personal healing was intricately related to larger healing, which is a central principle of ecopsychology and also mirrors ideas within systems theory and consciousness studies where the interconnectedness of life, permeates everything and change can spawn from the smallest part.

Experiencing Many Challenges to One's Worldview that Resulted in Changing It

The fifth characteristic, *experiencing many challenges to one's worldview that resulted in changing it*, was extremely revealing. I had assumed that the participants' realizations that there was an ecological crisis served as a transformative moment which both led them to do work engaging the ecological crisis and caused them to question and transform their worldviews. While many of the participants' awakening to the ecological crisis prompted them to do ecologically oriented work, some of the participants started doing work prior to recognizing the crisis. Moreover, perhaps the most important theme that surfaced in this study was that all of the participants experienced challenges and resulting transformations to their worldviews prior to engaging or recognizing the ecological crisis. These transformations included experiences with addictions, abuse, racism, transpersonal realities, gender and sexuality, death of a loved one, cultural awareness, divorce, breaking from a religious tradition, personal breakdowns, and through education. I believe that it was this process of being able to question their assumptions and those of their larger culture and world which allowed them to expand their frames of references through both subjective and objective reframing (Mezirow, 2000b). These challenges are also known as disorienting dilemmas where one has an experience that forces a questioning of one's worldview (Mezirow, 2000a).

Altering One's Thought Patterns to Relational Modes

The sixth and final characteristic is having examined *one's thought patterns and started to shift them to more relational modes*. Overall I found that the co-researchers had examined their thought patterns and were shifting them from linear to more relational modes. As stated earlier, a worldview or frame of reference is compromised of two dimensions, a habit of mind and a resulting point of view. The habit of mind is how one makes

meaning assumed from her or his culture and the resulting point of view is how one plays this meaning out in one's daily life (Mezirow, 2000b). While I discovered that all participants had changed their frames of references, some of the participants seemed to have only changed their habits of mind, the first dimension of the frame of reference, but had not necessarily changed their resulting points of views or behaviors, the second dimension. With the high level of education among the participants, I speculate that changing their habits of mind often occurred through intellectual processes such as reading and other forms of abstract learning. These often spawned partial changes in behaviors yet may not have resulted in first hand experiences that supported and furthered more substantial changes in behavior and their resulting paradigms. Education can be a powerful way to transform our habits of mind in terms of unraveling assumptions. However if we do not have first hand experiences that support these alternatives, there is danger that we may only abstractly know them without feeling them. Here lies the danger of the defense mechanism of intellectualization.

Walking Between Worlds: An Expanded Sense of Self

Kegan illustrates that in order to truly transform our paradigms we must engage in "reforming our meaning forming" where "We do not only change our meaning forming; we change the very form by which we are making our meanings. We change our epistemologies" (2000, pp. 52-53). By having multiple disorienting dilemmas, people become more comfortable with change as they recognize that there are larger realities within the world than they originally held. This process is known as the self-transforming self or fourth order consciousness where one continually reforms the way one makes meaning (epistemology) to the extent where one moves beyond an egocentric perspective (Debold citing Kegan, 2002). This process also aligns with the characteristics of creative people which include using independent judgment, being able to hold opposition and dualism (multiple and even conflicting perspectives), being comfortable with ambiguity, using one's intuition, and risk taking (Barron, Montuori, & Barron, 1997, Montuori, Combs, & Richards, 2003). Through this type of transformation, one develops the ability to understand the perspectives of others and to even hold multiple perspectives at once.

This idea of the self-transforming self depicts not only a process of changing one's relationship to self, it alters the whole notion of self where what was once a small self or egocentric self expands to a sense of self that includes the perspectives of other beings. It is as if one walks between the worlds of self and larger life. This process parallels diversity work where one adopts more than one worldview and develops a multicultural self (Anthony, 1995, Bennett, 2000). Deep ecologist, Arne Naess described this process as self-realization where humans mature their self to extend from ego to the social (other humans) to a metaphysical or ecological self that extends to both the apparent and unseen living world. This idea of walking between worlds where one's consciousness is expanded through embracing multiple realities aligns with what visionary, Starhawk, calls edge awareness, where "change in systems often comes from the edge (2004, p. 37)." By holding multiple senses of self or walking between worlds, we become awake, responsive, and transform.

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Educating Healthcare Professionals for Tomorrow's World: An Appreciative Inquiry Approach to Positive Change and Transformative Learning

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Abstract
The challenge of educating the next generation of healthcare professionals is fraught with complexity. To ensure a just and sustainable healthcare system in the future will require major changes in how we think about what we do to educate healthcare professionals. This session will engage participants in re-examining their experiences in healthcare education by participating in an Appreciative Inquiry (AI) interview, the heart of the Appreciative Inquiry approach to positive change. Participants will explore the strengths, successes, values, hopes, and dreams that hold potential for fostering transformative learning in educating tomorrow's healthcare practitioners.

Keywords: Appreciative Inquiry, Transformative Learning, Healthcare, Positive Organizational Change

Challenges in Educating Healthcare Professionals Today

Healthcare continues to be a topic of vigorous discussion in society. As costs increase, ethical, political, and legal debates rage regarding the involvement of government, insurance companies, and the pharmaceutical industry in what was once an intimate relationship between the individual and caregiver. Health sciences information is expanding exponentially, challenging healthcare providers to simultaneously assimilate new knowledge and adopt new technologies for accessing it. Healthcare educators, who are frequently also healthcare providers, are not insulated from the controversies when they prepare their trainees for the world that awaits them.

Despite differences in the specific context of their issues, many healthcare educators approach challenges as problems to be solved, focusing on crises and deficits in an attempt to "fix" what is wrong. Western medicine, in particular, with its disease-based narrative, is couched in problem identification and problem solving. For many educators, the daunting task of teaching the next generation of professionals has increasingly led to an energy-draining, problem-centered focus. It is no wonder that the most prominent trend in healthcare education in recent years has been the problem-based curriculum.

In spite of our collective expertise in problem solving, however, the healthcare dilemma seems to be growing. Changes in the nature of patient insurance, hospital reimbursement, and government involvement are all affecting how we educate healthcare practitioners. Academic accreditation organizations influence educational practice, as well, by mandating limits on work hours and spurring the movement toward a competency-based curriculum. Some consider this to be "the perfect storm" for academic institutions who are often involved in both delivery of healthcare as well as the education of tomorrow's doctors, nurses, dentists, pharmacists, and allied health professionals. To ensure a just and sustainable healthcare system for all will require major shifts in how we think about educating future healthcare providers in our society. Surely, now is the time to re-examine the premises of our educational practices with a theoretical orientation that includes critical reflection on the issues that confound us in teaching and learning within healthcare. Nothing less than education that holds the potential to transform beliefs, values, and assumptions about the current system—transformative learning (Mezirow, 1991)—is likely to be sufficient to meet the challenges.

In recent years, a small but growing body of work in positive organizational scholarship (Cameron, Dutton, & Quinn, 2003) has embraced the concepts of Appreciative Inquiry (AI) as they have developed from the work of David Cooperrider at Case Western Reserve University in the 1980s and others who have sought to infuse organization development with new approaches to replace a problem-solving orientation. In this paper, we provide an overview of transformative learning theory (Mezirow, 1991) and then briefly describe the literature in positive organizational scholarship and Appreciative Inquiry as an organization development strategy to inspire individual as well as collective change. These theoretical foundations form the basis for our experiential session.

Theoretical Foundations of Transformative Learning

The theoretical roots of transformative learning theory date from the mid-1970s when Mezirow (1978) studied the experiences of women who were returning to college during the era of the Women's Movement in the U.S., a time when many homemakers were actively transitioning into higher education in preparation for entering the job market. Since then, transformative learning theory has evolved considerably, but core elements of the theory have remained largely intact (Baumgartner, 2012; Taylor, 2009). Central to Mezirow's (1991) theory are the ideas that knowledge is socially constructed, subjectively construed, and subject to revision as a person modifies existing beliefs, values, or assumptions when they no longer serve as an effective interpretation of experience in the world. In the early years of theory development, Mezirow (1991) described transformative learning as a highly rational, largely cognitive process involving discourse (dialogue) with others in which an individual revised less functional beliefs to become more open to alternative viewpoints, more discriminating among them, and integrative of experience in the world. Transformative learning culminated with action or a decision to take action on revised meaning.

Transformative learning, asserted Mezirow (1991), is the basic developmental task of adulthood, a time when we are able to revise what was assimilated uncritically in childhood or absorbed from the beliefs and values of others who were important to us early in our lives. Mezirow viewed this early learning as *formative*, and subsequent revisions to the meaning of an individual's experience as potentially *transformative*. He theorized transformative learning as occurring through critical reflection and critical self-reflection on the meaning of experience that results in a revised perspective or frame of reference. Mezirow's perspective transformation (using early terminology associated with the theory) often involved an abrupt "disorienting dilemma" as a catalyst to critical reflection and critical self-reflection.

Mezirow (1991) drew upon Habermas' (1987) critical theory of communicative action in adopting Habermas' distinctions for categorizing learning as instrumental (task-oriented) or communicative (grounded in human communication). Mezirow thought that transformative learning could occur within either domain, but it was far more likely to occur as a communicative learning process that became emancipatory in freeing the individual from distorted perspectives or beliefs. Mezirow included Habermas' description of the conditions of ideal discourse, which he perceived as essential for reflecting critically on assumptions. From Freire (1970/1997), Mezirow incorporated the nature of *conscientization*, the process by which adults internalize awareness of the sociocultural reality of their lives and work to transform that reality through their actions. Mezirow also drew upon the psychotherapeutic work of Gould (1978) that described how adults can transform distortions in childhood learning during times of difficult life transitions, and Bower's (1984) propositions about the sociology of knowledge, asserting a social reality that is shared, sustained, and continuously renegotiated through communication.

In the last 20 years, research by numerous scholars has contributed to the expansion of transformative learning theory so that it is considered less universal and more individualized, influenced by the social context in which it occurs. Taylor (2009) emphasized the affective, relational, emotional, and intuitive aspects of learning now incorporated into the theory. In his 1997 review of the literature, Taylor noted that more studies referenced the significance of relationships with others in facilitating a perspective transformation than any other finding in the review (p. 53). Subsequent research continues to emphasize aspects of transformative learning that extend beyond the rational and analytic thought process it was first perceived to be.

Ettling (2006) reminds us of the ethical dimensions of attempting to foster transformative learning in our teaching, a process that requires the facilitator to provide a delicate balance between challenging learners' assumptions and providing support for perspectives that are in transition. With the maturing of transformative learning theory, Taylor (2009) notes that the original core elements of individual experience, critical reflection, and dialogue are complemented by greater awareness of the learner's context, a holistic orientation that encourages engagement with affective and relational ways of knowing, and an authentic relationship between teacher and learner when attempting to teach for transformative change. He reminds us that much remains unknown about the practice of fostering transformative learning and how it is related to learner-centered teaching, cautioning that teaching for transformation should not be practiced naively, as it includes personal risk, genuine concern for the learner, and considerable skill in creating a supportive classroom environment.

We believe that Appreciative Inquiry, a dialogue process that is set in a specific organizational context and situated in a particular moment in time for the individuals involved, holds this potential for transformative learning.

By creating moments for learning in which breakthrough thinking can occur through the use of positive questions, Appreciative Inquiry, an organization development approach to generate positive organizational change, can function to liberate individuals as well as entire organizations (Cooperrider & Whitney, 2005).

Theoretical Foundations of Appreciative Inquiry and Positive Organizational Scholarship

During the last 20 years, Appreciative Inquiry has been used to generate positive change for individuals and organizational systems around the globe (Cooperrider & Whitney, 2005). AI is a philosophy of practice about change in organizations based on the assumption that questions and dialogue about strengths, successes, values, hopes, and dreams are more transformational than a deficit-based approach to problem solving. Strength-based approaches to initiate large, whole system organizational change began to emerge in the organization development (OD) literature in the 1980s and 1990s, and included many different processes for re-organizing work and envisioning a desired future. Most of these emerged from the theoretical origins of gestalt psychology, systems theory, and psychoanalytic psychology, and included large-group strategies such as Future Search, Real-Time Strategic Change, and Open Space Technology (Bunker & Alban, 1997).

Cooperrider (1990) credits his development of AI as an approach to understand what gives life and positive energy to human systems as an outgrowth of grounded theory research in his dissertation study of a large hospital system in which he discovered the power of positive images to lead to positive action. Cooperrider (1986) undertook his initial study as an extension of action research with a purpose "to explore, describe, and propose an action-oriented approach to organizational inquiry which is uniquely intended for the study and enhancement of organizational innovation" (p. ii). Since then, he and his colleagues have developed this innovative approach for bringing about positive change by encouraging a focus on strengths rather than deficit-based analysis.

The genre of research called positive organizational scholarship, or POS, (Cameron, Dutton, & Quinn, 2003) appears to have emerged a few years later in the early part of this century with the writings of University of Michigan scholars in the Schools of Business and Psychology, who began to focus on themes of energy and positive emotions in organizations, resilience, and virtues in organizational life. Mainstream OD literature and practice has focused on identifying and solving problems, with gap and root cause analysis as the primary means, for almost forty years. The ideas inherent in a positive approach for improving organizational quality and working relationships has found wide appeal among managers as well as organizational consultants, so much so that AI and positive organizational scholarship are now closely identified as stemming from a common conceptual origin.

Bright (2009) expands upon the relationship of these two concepts, claiming that a POS framework for AI not only taps into the generative potential of people and organizations, but that it also holds the potential to create sustainable organizational change. He asserts a dynamic relationship between the positive forces of creativity, innovation, and positive emotions and the negative forces associated with negative emotions and organizational conflict. By envisioning these as two ends of a continuum, he reminds us that healthy organizations are not characterized by an absence of negativity; rather, they exist as places for the full range of human emotional and affective expression, with the belief that AI can nurture life-giving dynamics across the full range of human experience.

Appreciative Inquiry holds four key beliefs about how people and systems change: a belief that people individually and collectively have unique gifts, skills, and contributions to share with one another; a view of organizations as social systems that are created by the words and language used; the idea that images of a desired future are socially created and can drive individual and collective action; and a conviction that inquiry can shift attention away from a problem focus to the possibility of a more productive and positively-oriented future (Cooperrider & Whitney, 2005; Whitney & Trosten-Bloom, 2010). AI includes a four-cycle sequence of steps called the 4-D cycle of Discovery, Dream, Design, and Destiny. These are preceded by the identification of an affirmative topic that identifies the focus of study. Based on the notion that human systems move in the direction of what they study, identification of the affirmative topic becomes a decision of strategic importance. For our experiential session, we have identified our affirmative topic as "the healing power of healthcare education."

The Discovery phase is the starting point of AI with its essential appreciative interview. The interview consists of carefully crafted, unconditionally positive questions designed to initiate the search for new ways of thinking, instill a willingness to explore and discover, and promote openness to learning (Cooperrider & Whitney, 2005; Whitney & Trosten-Bloom, 2010). Good appreciative interview questions hold the potential for

transformative learning among participants by challenging existing points of view and perspectives and by focusing on the positive, creative, strength-oriented potential of individuals and organizations to generate change. Discovery asks participants to recall a high-point experience related to the affirmative topic—a time when the individual or organization was at its best or most effective. Sub-questions elicit reflection on the details of what made that experience so noteworthy and draw out the experience for further examination by painting a picture of who was involved and what qualities allowed this peak experience to occur (Whitney & Trosten-Bloom, 2010). With interviews that are often conducted in pairs, the resulting stories are then shared with a small group, also involved in their own interview experience. By examining themes across stories, a facilitator can elicit a depiction of individual strengths, positive images, and energizing circumstances to fully explicate the life-giving and energizing qualities of human experience in organizational settings.

In the Dream stage, participants are asked to imagine a transformed organizational reality for the future based on the themes discovered earlier. In this phase of AI, the focus is on what systems and practices might look like as if the strengths and meaningful experiences described earlier through Discovery had already occurred. Small groups have the opportunity to enact their images of the ideal in creative ways using drawings, skits, songs, or stories (Whitney & Trosten-Bloom, 2010). In this way, AI participants develop a shared vision of the ideal future and imagine that it is already in place. For settings in which AI is conducted over multiple dates, Discovery and Dream phases usually occur in one meeting.

The final two phases of AI, Design and Destiny, are about moving from visions to actual plans and implementation, with opportunities for continued support from facilitators to sustain new initiatives. Small groups have an opportunity to prioritize ideas and action steps and engage in the more traditional modes of "plan, do, study, and act" involved in project planning.

An Experiential Session with an Appreciative Inquiry Interview

In our conference session, we will introduce the basic concepts of AI to those who may be unfamiliar with this organization development approach for change by relating these ideas to the emerging body of literature on positive organizational scholarship. By considering the healing power of healthcare education as our affirmative topic choice, we will describe the "4-D" cycle of Appreciative Inquiry: Discovery, Dream, Design, and Destiny. We will outline the basic principles that undergird AI as an organizational intervention and the heart of the process, the appreciative interview.

Drawing upon Mezirow's (1991) concepts of content, process, and premise reflection, we will introduce a set of appreciative interview questions to explore the positive aspects of participants' collective experiences in healthcare education. We have crafted our questions to be broadly applicable to a wide range of educators and conference participants so that those who are not currently working in healthcare may also participate in describing the life-giving, energizing aspects of working with colleagues in educational settings, as well as with trainees and students. We intend that these questions should foster dialogue and opportunities to re-think existing beliefs and assumptions about practices in education, in general, and healthcare, specifically.

During this experiential session, participants will have an opportunity to conduct AI interviews with each other in pairs. Afterwards, we will ask small groups to discuss the resulting conversations and the insights that emerge from the posing of positively-oriented questions as part of our Discovery phase. A whole-session dialogue will follow to explore the relationship of AI questions to transformative learning theory as we "Dream" the future we would like to live.

Thoughts on Appreciative Inquiry and Transformative Learning

Participatory, question-based dialogue that is grounded in underlying assumptions of transformative learning theory has no guaranteed outcome. However, in our AI interview session, we hope to be able to foster the elaboration of meaning, create new meaning, and, if we are fortunate, provide the setting for critically reflective revision of beliefs or attitudes. We are unable to predict whether our session will reach this zenith in the short time available, but we anticipate that we will have set the stage for further interest and inquiry into the potential of AI for realizing positive organizational change and transformative learning for participating individuals and their organizations.

If we are able to spur greater inquiry into this approach for rethinking existing practices in healthcare education, in which the stakes are high and the challenges loom large, we believe that the potential for transformative learning exists. It is our hope that participants will be energized by the strength of their own narratives, find inspiration in each others' stories, and recognize the potential for transformative learning when they and their organizations focus on strengths and successes rather than failures in charting a future course.

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Experiencing Sustainable Communities: A Combined Effort

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Abstract
This paper uses theories from social psychology in an attempt to understand reasons behind nonsustainable behavior and to create novel learning experiences that align with transformative learning theory. The experiential component will involve participants working toward a common sustainable goal. The experience examines the intersection of social class and exposure to waste. Participants will come to understand the worldview, concerns, priviledge, oppression, and emotions involved with certain communities through a "townhall" meeting where two disparate communities must come together and grapple with the impact of waste and environmental abuse within both communities, albeit at different levels.

Introduction

Scientists have been increasingly voicing concerns that the world is in an ecological crisis. "Learning to live sustainably on this earth is non-negotiable as the earth's resources and capacities for absorbing and accommodating anthropogenic impacts are finite. On the other hand, except at the level of survival, our wants are relative, insatiable and negotiable because they are the product of political, cultural, economic and social developments." (Räthzel & Uzzell, 2009). Sustainability carries many meanings throughout the various academic settings. Nonetheless, the overall goal is to reduce the human impact on Earth's natural resources.

There has been significant research addressing educational programs that attempt to increase environmental awareness and learning about sustainable issues with the intended aim of changing people's behaviors to become more sustainable. However, the effectiveness of these programs has been mixed (Dwyer, Leeming, Cobem, Porter, & Jackson, 1993). These programs typically posit that the reason behind individuals not being sustainable is that they lack the awareness into the issues and strategies. Thus, the perceived answer is to increase the awareness and options through educational programs. The vast majority of these studies are pre/post, repeated measures designed evaluations of a particular educational program examining whether learning of new material has occurred and whether there were any changes in attitudes toward the environment. Currently, the consensus is that environmental educational programs are generally not effective, although there are a few exceptions (Staats, Harland, & Wilke, 2004). These exceptions involve programs that specifically target a population and a particular behavior; these are the programs found to be most effective. As such, the research differentiates between general educational programs that aim to change behavior across various domains of life compared to targeted programs aiming at a specific behavior. The more a program and its evaluations are designed to target a specific behavior, the more effective the program.

Lefay (2006) provides an exhortation that pushes the current framework of environmental education to go beyond experiences that have limited impact:

> What is needed is an intuitive, passionate and embodied response, a radical shift in the dominant Western worldview, a quantum leap in consciousness that will shake us from our cultural malaise and inspire us to take action and build practical solutions for sustainable living. The key to this transformation lies in education. Not the same education that got us into this mess, but a new paradigm for learning as a transformative process, leading to a deep awareness of our interdependent place within the dynamic web of life, and a re-enchantment of the world as a powerful mystery. Education can and must be redefined and transformed to become itself a transformative process, such that we learn to see the world holistically and act to protect, respect and restore the Earth, our living home (pp. 36).

Social Influences on Behavior

Drawing from social psychology to transformative learning theory, what may be needed are learning experiences that are truly disorienting – transformative experiences that leave individuals no other choice then to reflect and change themselves to fit the common reality. Social psychology has provided a wealth of research related to social influences on individual behavior. Specifically, studies related to authority and social roles within group settings have revealed the conforming nature of human beings under certain conditions. Within these conditions, test subjects have often engaged in sometimes alarming behaviors that highlighted the power of groups. Can social psychological research provide a framework in which to understand why sustainable behaviors are hard to instill and sustain over the long-term? Specifically, how are sustainable behaviors influenced by group dynamics?

Conformity

Three historical and important studies from social psychology will be examined for keys to understanding how group settings can influence individual behavior environmental behaviors. Asch's (1952, 1955) study on conformity within a group setting provides a context in which to understand the power of social influence on an individual's decision-making capacity. One hundred twenty-three students were recruited to participate in what they thought were vision tests. Participants were placed in a room with 5-7 other students; however, these other students were confederates (i.e., trained research assistants of the study). They were then shown a series of two cards. One card had one vertical line on it. The second card had three vertical lines of different lengths. Each line on the second card was labeled A, B, or C. One line on the second card was obviously the same length as on the first card. The participants were all shown both cards and asked to identify the line on the second card that matched the length of the first card. The participant was either last or next to last to answer so that they would hear the responses of the confederates before they answered. Eighteen total trials were administered. For the first few trials the confederates all gave the correct answer. Afterwards, there were 12 trials where confederates gave incorrect answers, as instructed beforehand. A little over 75% of participants (76.4%) gave at least one incorrect answer along with the confederates. On average, over a third (36.8%) gave incorrect answers along with the confederates across the 12 test trials.

Asch's study revealed that despite the presence of an obvious answer to a question, about one third of participants will give the incorrect answer to conform to the group. Thus, the effects of the socializing power of a group can alter one's behavior despite conscious awareness of a different personal preference or sense of right. In modern vernacular, peer pressure – in Asch's study this was indirectly applied – can be a significant influence on behavior and decision-making. Within a community setting, a large number of individuals likely know appropriate sustainable behaviors. However, when they observe others make unsustainable decisions, will they "fall in line" due to the conforming phenomenon found in Asch's study? Given the results of Asch's study, the majority of individuals, over a lifetime, are likely to conform at some level.

Authority

Milgram's (1963, 1964, 1974) study is an example of how people can obey commands and engage in controversial behaviors despite mixed feelings in the presence of an authority figure. Using deception and confederates, participants were recruited under the guise of involvement in a learning study. Forty male participants were told that they were to play the role of a "teacher". The teacher was told to administer electric shocks to the "student" whenever an incorrect response was given. The student, however, was a confederate of the study and did not actually receive shocks but pretended to act as such. The teacher and student could hear each other but the study was set up so that they could not see each other. The teacher was placed in front of a machine with different levers with voltages clearly marked. The teacher was also introduced to the student and shown how the student was connected to the shock machine. Another confederate, the experimenter, was also in the room that provided commands. If the participant expressed concerns about continuing the study, the experimenter would urge him to continue. Sixty-five percent of the participants delivered maximum shocks, despite appearing distraught, agitated, and also angry at the experimenter. Milgram (1974) proposed that participants were obedient for several reasons with several focusing on the presence of an authority figure (i.e., the experimenter), respect for the authority figure (i.e., the study was done at Yale University), and that the authority was deemed to be an expert.

Though perhaps demonstrating behavior along the extremes, Milgram's study points to the power that authority figures may have over individual behavior. When individuals are in a setting where there is a person of authority giving commands, dictating rules, or influencing the norms of that group, individuals may obey and "fall in line" despite harboring mixed emotions. In group settings, there will inevitably be a distribution of power and hierarchy, resulting in authority figures. If these authority figures give commands or create rules that are not

environmentally sustainable, individuals may likely follow despite protestations and other antagonistic feelings. In other words, Milgram's study may also not only highlight obeying authority figures, it also shows that people may engage in behaviors despite conscious awareness of personal objection to it. Milgram (1974) suggested that participants possibly "justified" their behavior because of the perceived power and expert authority of the authority figure.

Both Asch's and Milgram's respective studies were conducted in tightly controlled laboratory settings, each with confederates that assisted with the manipulation of test subjects. Though criticisms of these studies may indicate that the conditions were unrealistic, at least for Milgram's study, the research was designed to replicate and explain real-world phenomenon (i.e., Nazi Germany). Around the time of Milgram's study, the trial of Adolph Eichmann was underway and Milgram (1974) hypothesized whether it was possible that people could follow orders even against their own moral beliefs. Research that has replicated Milgram's studies confirmed his findings in diverse populations across the world (Forsyth, 1999). It is important to ascertain whether the phenomenon described and validated in both these studies could have actually happened in real life and under what conditions.

Social Roles

Haney, Banks, and Zimbardo's (1973) prison study was conducted with 24 male undergraduate students, who were screened for physical and mental health. Participants were randomly assigned to either playing the role of a prisoner or a prison guard. In this simulation study, the researchers wished to recreate a prison setting to observe the impact of being a prisoner or prison guard. Using a converted basement of an academic building on campus as a prison, the prisoners were subjected to typical arrest protocol and transported to the converted prison by the local police. There, they were met by the student prison guards. The setting was made to feel as realistic as possible with prisoners given prisoner clothing and the prison guards given uniforms. By the second day of this experiment that was originally designed to last two weeks, the prisoners and prison guard demonstrated antagonism toward each other with prison guards exhibiting abusive and threatening behavior often seen in real prison settings. The study was terminated after six days. Although this study has been often criticized for both ethical violations and methodological flaws, it provided a window into the power of social roles and how specific situational contexts can influence behavior (Zimbardo, 2007).

Oft-criticized on methodological and ethical grounds, Zimbardo, one of the original researchers, has written extensively about this experiment, now known as the Stanford Prison Experment (Zimbardo, 2007). He contends that the value of the experiment is demonstrating that seemingly good people can be induced into doing evil things within the confines of social rules that absolve them of individual agency (Zimbardo, Maslach, & Haney, 2000). In relationship to sustainable living, how do roles (either perceived or externally defined) impact individuals' relationship with the environment and, subsequently, sustainable behavior? Social psychological research suggests that it would take seemingly extraordinary effort to break out of group norms. Thus, the radical and humanistic approaches to environmental education, as defined by Walter (2009), seem to be appropriate fits for educational experiences that focus on group dynamics as these approaches may provide internal inertia toward change.

Rationale

The first fundamental step in transformative learning requires a disorienting event (Mezirow, 1994). To progress through the reflexive process that embodies transformative learning, the individual must begin the process of challenging native and often well-established meaning structures. Thus, this is a process that is not easily or readily embraced perhaps partly because of the time and energy needed to think of an event as disorienting. Humans naturally have an affinity for normalcy. Given the review of some of the important research related to social influence on behavior, the session will use those concepts to highlight how a group setting can negatively impact one's autonomous decision making as well as how identities within those settings can influence individuals to defer responsibility or play a role to the detriment of others personal ideals. The goal of the experiential session is to observe how personal social roles and group dynamics interact with personal consciousness to create a possible disorienting event that demands further reflection.

Prakash & Waks (1985) suggested that in transformative learning "a conception of self-actualization in which each person's good depends on the common good and refuses to let the good of any member of society be sacrificed for the self-actualization of another" (pp. 88). Each individual's experience must be validated. Neioto and Bode (2007) believe that transformative learning involves experiences that change people's views of the world and empower them to take action to improve their surroundings and their place therein. There is, thus, an action-oriented component of transformative learning; it is not merely knowledge gained. Additionally, "environmental

activism furnishes a context for deepening our understanding of the emotional state" (Kovan & Dirkx, 2003, pp. 102). In short, transformative learning encompasses both cognitive and emotional changes that result in behavior change. The experiential session will attempt to accomplish this by having participants experience the conforming power of social influences, especially the emotional and cognitive conflict that occurs in this type of setting.

Brookfield (2000) captured the conflictual nature of this type of learning by suggesting that learning is both about becoming a person who lives in and conforms to society, and at the same time, developing as an individual who is able to be critical of it. This discrepant perspective can be ignored or it can lead to an examination of previously held beliefs, values and assumptions. When the latter is the case, the potential for transformative learning exists, though it is not called transformative until there is a deep shift in perspective and noticeable changes in actions as a result of the shift (Cranton, 2011). Just learning about how one's role and place in society negatively impacts the environment is only part of the learning process. When challenged, individuals then have a choice to make. The basis for this experiential session is that experiencing first-hand how one's behavior due to social influences has a direct and negative impact on others' wellbeing will play a significant role in altering those negative behaviors.

Session Description

The session will begin with a brief introduction by the session facilitators. Session participants will be informed that everyone involved in the workshop is a member of a fictional town and the town is facing an important decision regarding the placement of a new landfill. Based off of extensive research, the town and their government have concluded that the only viable option for the placement of the landfill is within the boundaries of their town. After the brief introduction, session participants will be asked to split into two groups, based off random assignment. These groups are two disparate communities living within the same town.

The first group will represent a more well-resourced community. Each individual will receive the same document highlighting the nature of this community. Specific elements of this community include median income, typical occupations, typical personal and social interests of the community, as well as issues and policies that typically concern them. Additionally, each participant will receive an individualized document that describes the specific demographic and role that individual is being asked to represent. This will include specific family information, career choice, financial situation, as well as personal issues that are relevant to that individual. There will be a few common themes that are shared by all the individuals that bring together this community. Based off of the provided information, this community will develop a solution to the landfill problem.

The second group will represent a resource-modest community. Each individual in this group will also receive the same documentation of others members of this group highlighting the nature of their community including median income, typical occupations, typical personal and social interests of the community, as well as issues and policies that typically concern them. Each individual will also receive an individualized document that describes the specific demographic and role that individual is being asked to represent. Similar to the first group, there will be common themes shared by all individuals in this community. They will also come up with a solution to the landfill problem based off of the information provided.

After developing a solution in their respective communities, all participants will come together in a town hall-style meeting to develop a town-based solution. After the town hall meeting, session participants will have an opportunity to debrief the experience, especially focusing on the influence of their respective roles in the exercise.

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Assessing Transformative Learning Outcomes and Processes

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Abstract

The purpose of this research was to develop a validated quantitative survey to assess the outcomes and processes of people who engage in transformative learning. Based on extensive review of theory and research of transformative learning a survey was constructed that adhered to strict guidelines: external review by experts; multiple focus groups, and pilot testing for inter-item correlations for each scale and cross-scale correlations. This survey will offer greater clarity to the outcomes and processes of transformative learning and it helps move the study of transformative learning towards a more unified perspective inclusive of multiple interpretations of transformative learning.

Introduction

Over the last 35 years, transformative learning theory has been investigated extensively in a variety of settings; in relationship to variety of significant life experiences; and across a range of positionalities. Most of these studies have relied on retrospective interviews as a means of data collection. However, Taylor (2007) identified three further trends in recent research: longitudinal designs, action research, and the use of surveys and questionnaires. The surveys were mostly used in mixed method studies (King, 1999, 2003, 2004, Crag et al. 2001). Yet, the prevalent philosophical orientation to research has been rooted in constructivism, where "research constructs an understanding of the phenomenon of interest from the perspectives of those who experienced it" (Merriam & Kim, 2012, p. 58). Most significance in the survey research is the work of Kathleen King (2009) who developed the Learning Activities Survey. This survey has been used in numerous studies to identify "whether adult learners have had a perspective transformation in relation to their educational experience; and if so, determining what learning activities have contributed to it" (p. 14). The Learning Activities Survey has been used in a variety of other applications (Brock, 2010, Glisczinkski, 2007; Hodge, 2010), although it has not been thoroughly critiqued, especially in terms of construct validity (Taylor& Snyder, 2012). In response to this concern, the goal in our research is to develop a reliable and valid assessment of transformative learning.

Theoretical Framework

The theoretical framework for this survey development was a unified theory of transformative learning (Taylor & Cranton, 2012). "A more unified theory allows us to continue to speak of transformative learning while maintaining the diversity of approaches that so important to the complexity of the field of adult education" (Taylor & Cranton, 2012, p.3). Although there are multiple conceptions of transformative learning, they are likely " the result of scholars examining different facets of the same thing" (Cranton & Taylor, 2012, p. 3). This means that the process of transformative learning may vary due to the circumstances, context and those involved; however, the outcome for all the conceptions is similar, that of developing a more inclusive, discriminating, and permeable worldview (Mezirow, 1991). Operating from this assumption, the theoretical framework for this study reflects three dominant conceptions: the psychocritical perspective (e.g., Mezirow, 1991) that emphasizes rationality, critical reflection and ideal conditions for discourse; the extra-rational perspective (e.g., Cranton, 2006; Dirkx, 1998) that emphasizes the emotive, imaginal, spiritual and arts-based facets of learning; and the emancipatory approach (Brookfield, 2012; Freire, 1984)that emphasizes ideological critique, unveiling oppression, and social action in the context of transformative learning. We derived the items for the survey directly from these theoretical conceptualizations while also considering the extensive qualitative research.

Survey Development

The development of the survey to assess the outcomes and process of transformative learning began with an exploration of theoretical perspectives. The research team met regularly to develop potential items that were derived directly from theory. We created a survey with two primary parts: (1) outcomes and (2) processes of transformative learning. Across the theoretical perspectives, there are four standard *outcomes*: (a) acting differently, (b) having a deeper self-awareness, (c) having more open perspectives, and (d) experiencing a deep shift in worldview.

There are three *processes* by which people experience transformative learning: (a) cognitive, rational (b) beyond rational or extrarational, and (c) social critique. The *cognitive, rational process* has its roots in Mezirow's (1991) writing. Five scales were developed to represent this process: critical reflection, experience, disorienting dilemma, and discourse. The *extrarational process* is based on the work of Dirkx and others who go beyond rationality to explain how people experience transformation. It is comprised of six subscales: arts-based learning, dialogue with others, emotional reactions, imaginal learning, spiritual learning, and soul work. Transformative learning as social critique is a process advocated by those who are critical of the emphasis on the individual in the previous two frameworks. Social critique includes three subscales: ideology critique, unveiling oppression, empowerment, and social action.

These outcomes, processes, and their sub-categories were formed into an instrument with 19 scales. A person taking the survey receives scores on each scale. The outcomes scores indicate the degree to which the person has engaged in transformative learning in general; the process scores indicate the probable processes a person goes through during a revision of perspectives.

To provide construct validity, this version of the survey, was sent to 20 known experts in the area of transformative learning—people who have published extensively, done research related to transformative learning, and/or contributed to theory development. The expert reviewers were asked to comment on the degree to which the items were true to theory. Ten reviewers responded to this request. Their comments were compiled and their suggestions for change were integrated into the survey. The next version of the survey was created by adding a Likert-type scale (mostly disagree to mostly agree), randomly ordering the items, adding a short section on demographics, and adding two open-ended questions where respondents described a life-changing experience.

The next stage of survey development involved two focus group meetings with members of the university community (staff, students, and faculty). Participants completed the survey and then discussed the questions: Were there items you didn't understand? Were there questions where you didn't know how to respond? Were the directions for the survey clear? One researcher facilitated the focus group; another researcher took extensive notes on the discussion. We used the results from the focus groups to revise the items and prepare the survey for pilot testing. Descriptive statistics and inter-item correlations were calculated, and these results contributed to the revisions made to the items.

Pilot Testing

In this section, we describe the pilot testing of the survey: the participants, their responses to the open-ended questions, descriptive statistics for each scale, inter-item correlations for each scale, and cross-scale correlations.

Participants

Of the 136 people who participated in the pilot study, 21 were men and 95 were women, with 20 not responding to the question. The majority of the respondents were between the ages of 24 and 64, with one person being under age 24, and 9 being 65 or older. Twenty-seven people had a Bachelor's degree and 83 a graduate degree, reflecting the context and nature of our recruitment of participants (mostly through Canadian and US graduate program listservs and word-of-mouth). Seven people had high school completion or some college and university. The majority of respondents (88%) gave their race as White; and 12% described their race as Black, Latino, Asian, or mixed race. Fifty-three people listed the US or American as their nationality; 37 people gave Canadian as their nationality. The remaining respondents were spread across a wide variety of nationalities with no more than one or two for each of the nationalities. The majority of the participants (91%) described their employment as "professional."

Responses to Open-Ended Questions

At the beginning of the survey, we asked the pilot study participants to respond to two open-ended questions. The purpose of these questions was to focus people on a specific life-changing event (transformative learning experience) that they could consider as they rated each of the statements. The first question directed people to "Describe the event here. When did it happen? Who was involved? Where did it happen?" The responses were individualistic and varied, as would be expected, but there were some commonalities. The most frequently listed events were: death of a loved one or loved ones (n = 27), life threatening illness (self or loved one) (16), divorce or separation (13), educational experiences (13), birth of a child (12), loss of job (7), living outside country or culture, immigration (7), and love/marriage (5).

The second open-ended question asked people to respond to: "In what ways did this event change your life?" The answers here were even more varied. The most frequently reported changes were: changed family life (n = 15), changed my perspective as an educator/learner (14), changed my lifestyle/my world view (12), left job, changed job, took job (8), new life, new friendships (8), faced with raising children alone (7), life is precious, greater appreciation of life, love life (7), and every aspect of my life (5). For both of these questions, many participants responded at length, providing several paragraphs telling their stories and describing their experiences.

Descriptive Statistics

Descriptive statistics were calculated for each of the 110 items. It is not especially interesting or meaningful to list those statistics for every item; what we do here is to review some of the highlights and point out those statistics that were influential in reviewing and revising the survey.

With the exception of one item, all of the "outcomes" items had means of above 3.0 on a 4-point scale and standard deviations of less than 1. This means that those people responding to the survey indicated that they had experienced a life changing event—events that involved acting differently, increased self-awareness, increased openness, and a shift in worldview.

For the process items based on three different perspectives (cognitive/rational, beyond rational, and social critique), there was considerably more variation in the descriptive statistics. Some items had means of 3.0 or higher, but most were in the range of 2.5 to 3.0 (with the lowest mean being 1.9 on a four-point scale). Many items had high standard deviations; that is standard deviations of 1.1, 1.2 or 1.3, indicating that people were responding to the items on both ends of the scale. This was particularly the case in the "beyond rational" realm, especially with the scales related to arts-based transformative learning, spiritual transformative learning, and soul work.

Inter-item Correlations by Scale

Inter-item correlations with scales are used to determine whether the items on each scale are related to each other, as they should be if they are measuring the same concept. We used Spearman's rho rather than the more traditional Pearson's r for this calculation, as the rating scale had four points, and we did not feel we could be confident in assuming equal intervals between the points on the scale.

With only one exception, all of the items in each of the "outcomes" scales correlated significantly with each other. Among the "beyond rational" process scales all items correlated significantly and strongly with each other for the arts-based, support/dialogue, emotions, imaginal/soul work, and spiritual scales. Initially, as a separate scale, "soul work" had a number of weak correlations, so we consulted with Dirkx's (2012) description of soul work and images and realized that if we combined those two scales, we would have a more reliable new scale. Support and dialogue were merged simply because the items across those two scales were highly correlated, and conceptually the items were about the same thing—getting support from others through dialogue.

Among the cognitive scales, action, critical reflection, discourse and experience all had one or two items that did not correlate well with the other items. We were able to eliminate some items, and we revised the wording of others. The items on the disorienting dilemma scale correlated significantly and highly with each other.

In the social critique grouping, the items for social action and ideology critique correlated significantly and well with each other. The scales for emancipation and social action each had one or two items that did not correlate well. Because we had extra items for these scales, we were able to simply delete those that were not functioning.

Cross-scale Correlations

Cross-scale correlations were calculated using Pearson's r. Since each scale combined the ratings of several items, we were able to make the assumption of equal intervals among the data points with confidence. This assumption was supported by the descriptive statistics for each of the scales. The four outcomes scales correlated highly with each other—correlations ranging from .59 to .77. We expected these scales to be related and they represented different facets of the possible outcomes of transformative learning. In general, the process scales were correlated with each other in predictable ways. The beyond rational scales correlated between .29 and .73 with each other. The cognitive scales correlated between .27 and .70 with each other. And the social critique scales correlated between .43 and .71 with each other.

What is perhaps more interesting, and also a test of validity, is to look at the scales that did not correlate with each other. A few examples will illustrate this. "Cognitive action" did not correlate with "support." "Disorienting dilemma" did not correlate with "spirituality" or "support." "Discourse" did not correlate with "dialogue" or with "support." "Unveiling oppression" did not correlate with "spirituality," "support," or "disorienting dilemma." "Ideology critique" did not correlate with "dialogue," "support," "spirituality" or "disorienting dilemma." In the next section, we review the process of revising the survey based on the results of the pilot study.

Sample Items

Two sample outcomes items are:

I have experienced a deep shift in the way I see some things in the world.
I have experienced a deep shift in the way I see some things in the world.

Four sample process items are:

Encountering a disorienting event leads me to see myself in a different way. (Disorienting Dilemma)
I call upon a higher power to help me get through a difficult situation. (Spiritual)
During a social change, I challenge what I see and hear on television, in print and on the Internet. (Ideology Critique)
I seriously question my beliefs and actions. (Critical Reflection)

Next Steps

The next step for this survey is to sample a large group of individuals in a variety of settings, circumstances, educational backgrounds and positionalities. This will allow us to further establish the reliability and validity of the instrument. In addition, it would also be important to use this instrument with participants who have recently shared a similar transformative event (e.g., graduating from higher education, significant health recovery, intercultural experience, social movement). Using both broad data collection along with purposeful sampling could strengthen instrument significantly and provide an opportunity to better understand the kinds of events that lead to transformative experiences.

Issues Associated with Quantifying Transformative Learning Theory

Researchers often make a distinction between qualitative and quantitative data, as if one is mutually exclusive of the other. However, survey development serves two complementary purposes. The actual development involves quantitative analyses of large numbers of responses from participants; the end product, the survey, can provide feedback to individuals on the extent and nature of their transformative learning as well as feedback on whether transformative learning was fostered in a particular group. By collecting individual stories of transformation experiences in the open-ended questions, we will be able to analyze the themes in the types of transformation. By collecting aggregate survey data that relies upon self-report of 80 different statements about theoretical principles of transformative learning, we will be able to determine certain patterns that occur in the outcomes and processes of transformative learning. The results gathered from the initial survey will be a starting point into further investigation into how individuals and groups process transformative experiences**.**

The lines between the three primary research paradigms blur in our research. On the surface, it looks like we are working in the empirical-analytical paradigm, primarily because the data consists largely of numbers. But in another way, we are working in the interpretive paradigm. That is we are not conducting research to control and manipulate the environment, but rather our intent is to further the understanding of individuals and groups about a process they go through by using self-report. It is even reasonable to imagine that the survey could be used in the critical paradigm, for example in a participatory action research project.

Another issue in our work is whether the survey can be used in context-specific settings (for example, a particular program) as well as in a broad-based fashion (for example, similar to any learning styles inventory). If so, what kinds of changes, if any, would need to be made to the instrument for context-specific applications?

Implications for Theory, Research, and Practice

The implications of this survey are numerous. Theoretically, it brings clarity to the consequences of transformative learning and its relationship to the process of transformation. It also begins to move the study of transformative learning, which has become fragmented into numerous conceptions, towards a more unified perspective inclusive of multiple interpretations of transformative learning (cognitive, extrarational, and social critique). The merging of various conceptions helps address a major concern raised by Brookfield (2000) and others about the "misuse of the word transformation to refer to any instance in which reflection leads to a deeper, more nuanced understanding of assumptions" (p. 139). Through the development of this survey boundaries start to emerge related to transformative learning as a distinct form of learning in relationship to other adult learning theories (e.g., Newman, 2012).

The implications for research are many and diverse. Any researcher who wants to assess the extent to which transformative learning occurs in a specific context or in relation to a particular population can use the survey alone or in conjunction with other data collection techniques such as interviews or storytelling.

For practitioners who have transformative learning as a goal of their teaching or their programs, the survey can be used to assess the impact of their efforts. Most theorists agree that transformative learning can be best assessed through self-report techniques. The survey contains theoretically derived statements about the outcomes and processes of transformative learning; students respond by indicating the degree to which those statements describe their experience.

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Blending Intuitive Listening and Somatic Awareness for Transformative Change

Eleanor Criswell, Ed.D. (Emeritus Professor, Sonoma State University) and Ariana Strozzi

Abstract

Transformative learning can be considered the expansion of conscious awareness through the transformation of the basic worldview and capacities of the self. Transformative learning is learning that transforms. Transformative learning can be facilitated by a variety of means. Intuitive listening and somatic awareness are important for transformative learning, because they can enable us to access the more unconscious processes that influence learning and change thought and action.

Introduction

Eleanor Criswell is an educational and counseling psychologist. She came to the somatics field through her collaboration with Thomas Hanna, which began in 1967. She trained with him in Australia in 1982. His work later evolved into Hanna Somatic Education. Other influences in her work include Moshe Feldenkrais with whom she took a month long professional training workshop in 1972. She began practicing yoga in 1967 and began to teach it at Sonoma State University in 1969. She has been involved with biofeedback since 1967. A student of parapsychology since 1972, she was founding director of the Psychic Integration Institute in the middle 1970s. She is currently editor of *Somatics* magazine and director of the Novato Institute for Somatic Research and Training.

Criswell developed Equine Hanna Somatics in the late 1990s. As she practiced the hands-on somatics work with horses, she began to be more and more aware of the socioemotional nature of horses. She became more aware of their responses to humans. This led her to appreciate Ariana Strozzi's development of Equine Guided Education. Criswell attended Strozzi's two week training two years ago. Her experience with Strozzi and her earlier experiences with horses began to open her up to the natural world in ways that she had not experienced before.

Ariana Strozzi comes to her work from her lifelong experience with horses, other animals and birds. She grew up riding horses in the natural lands along the coast of Marin County, California. While attending U.C. Davis, majoring in zoology, she spent five years working with birds of prey at the U.C. Davis Raptor Center rehabilitating hawks, eagles and owls for release back into the wild. She also spent several years working in the non-domestic ward at UC Davis Veterinary School healing snakes, turtles, exotic birds and other wild animals.

Horses remained an integral part of her life as she continued to work at a variety of horse ranches to support herself through school. After college she continued working at horse ranches and managing veterinary hospitals and volunteering at the Raptor Migration Center at Fort Mason, San Francisco. She worked with her former husband in the creation of an institute devoted to somatics and leadership. She discovered that "To create a sustainable change in how we think, behave and respond to life requires addressing the mind, body and spirit as a unity." She began to bring horses into her somatics work in 1989. She learned through experience that the energetic mirror that horses are for each participant directly correlates with other significant areas of their lives. Furthermore, she learned that people will accept feedback from horses faster than they will from humans and the subsequent change in thought and behavior is dramatically increased. She coined the term Equine Guided Education for the process in which the horse guides the exploration of the client's inner world and the habits of relating to self and others. She is currently owner of Skyhorse Ranch in Valley Ford, California.

The intuitive process is a natural process. Intuition refers to direct knowing. The *Encyclopedia Britannica* defines intuition as *the power of obtaining knowledge that cannot be acquired either by inference or observation, by reason or experience*. Intuition is an independent source of knowledge that we cannot exactly define or quantify, a *precognitive knowing* of oneself in relation to the outer world. It is informed by energetic sensations and responses. It arises out of the unknown landscape of our physical being and the energy of the environment around us. If we allow our intuition to enter into our cognitive space uncensored by our historic conditioning, it can inform us in profound ways.

In this culture, we have grown increasingly appreciative of intuitive knowing over time. It is a process that has been observed and reported throughout time in many cultures. We can observe evidence of it in other animals. Antonio Damasio, neuroscientist, writes in his book *Self Comes to Mind* that creatures of all evolutionary stages

seem to predict coming events. Dean Radin, Institute of Noetic Sciences senior scientist, reports evidence of a presentiment effect in humans and other animals. It makes sense that for survival purposes animals need to have some sense of coming events based on past events. As you relate to horses and the natural world, you may notice increases in your intuitive processing. You may notice it in dreams, insights, and in an increased sense of future events. In yoga, the *siddhis*, paranormal powers, have been reported to develop from a variety of sources. The yogi is encouraged not to pursue these abilities, but to allow them to flower and contribute to life as they will.

Changes in intuition can contribute to facilitating social interaction. It has been said that only 7% of communication is based on verbal language, the other 93% is body language. Ninety-three per cent of the information comes through by way of non-verbal communication. The non-verbal dimension is communicated by body posture, gestures and movements, facial expressions, voice quality, respiration patterns, and fluctuations in our energy field. Also part of the non-verbal communication is intentions, attitudes, expectations, intuitions, and so forth. We can learn more about our non-verbal communication by working with horses through EGE and other approaches. We can learn more about it just spending time with horses or other animals. They mirror our emotions, motivations, and intentions. This experience can enable us to develop our intuitive listening.

Somatics is the term developed by Thomas Hanna, an American philosopher, for the mind-body disciplines. Somatics comes from the Greek word *soma*, which refers to the living body, and was further defined by Hanna as the body experienced from within, where there is no mind-body split. In this talk we will discuss how somatics involves the pulsing, connected nature of all things, the sensate wisdom within all living beings: mind, body spirit in its wholeness. Mind-body disciplines come from a variety of traditions, cultures, and historical lineages. There are contemporary somatics disciplines and ancient ones. Some professions focus on the way the "soma" itself responds to the environment; others focus on the way the mind interprets the "soma's" response. The least studied, and perhaps most important aspect of somatics is the spiritual dimension in which the self, mind/body and spirit, is intertwined within the larger environment of our experience. The more we quest for the answer to "who am I," the more we begin to realize that it isn't about 'I' at all, but rather, who I am in relation to the greater whole. From this perspective, self-development directs its focus on our social instinct to contribute or relate to the whole to which we are fundamentally connected.

The study and practices of somatics take a variety of forms. For example, an ancient form is yoga, a five thousand year old somatic discipline with millions of practitioners throughout the world, especially India. There are over 20 million yoga practitioners in America alone. An example of contemporary forms is the growing number of dancers who are incorporating the somatics dimension in their work. Other contemporary somatic disciplines include Structural Integration (Rolfing), The Feldenkrais Method, The Alexander Technique, Bioenergetic Analysis, Hanna Somatic Education, Somatic Experiencing, Body-Mind Centering, and many others.

The body is the primary information gatherer, whether you are a human, dog, horse, or bird. The body responds to the environment first, the mind comes along after the fact and interprets the energetic stimuli present. At a biological level, the body responds with immediate speed, before thought, determining safety versus danger. The body is the 'self' (its own unity) as it relates to, contributes to, or takes away from the environment. The body holds all of the experiences and memories of our lives. It relates to the environment first. It is the part of the self that we need to listen to most; the first informant; the first interaction with change. In order to change our environment, we first have to change ourselves: the way our body interfaces with and responds to the environment.
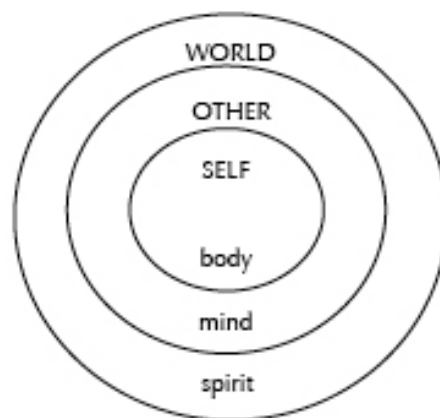
The mind is in the social domain of "other." How we think about and relate to others, how others relate to us is the next immediate interface we have with the whole of the

environment. We are social animals: Our instinct is to care about how others perceive us. Often it is either our perception of how others see us, or how others tell us they perceive us that can produce either a healthy or an unhealthy self-perspective.

The spirit correlates with how the self orients with respect to the world, how the self connects to the environment and the larger cosmos of reality. This includes an individual's beliefs, ethics, and values. It includes the underlying destiny or life purpose of the individual. The mystery of past life experiences and the innate desire to contribute to the whole lives here. This seems to be the least studied area of somatics, perhaps because it is the most indefinable, the most mercurial and mysterious of the somatic domains. In many indigenous cultures, the shaman or medicine person's primary function is not actually to heal the individual, but to heal the dis-harmony between the community of people and the natural environment within which the people live. We like the shift from disease (a focus on what is wrong with the individual's physical body or mind) to dis-ease, meaning more directly that the individual is not in ease or flow with its surrounding environment, which is made up not only of family, friends and the human community, but also the rocks, trees, wind, birds, and animals that surround the individual. Transferring the focus from what is wrong with the individual (loaded with human judgments) to locating where and how the individual is misaligned with his/her relations to others and the environment allows an important shift in the individual's ability to develop a healthy self-image and more effective habits of relating.

Somatics and Spirit
Each person is a soma contributing to the energetic aliveness of the environment. Each animal and plant is also a contributing soma. Even the wind, the sun, the mist, the rain are contributing somas. And so begins the realization that each is influencing the other all the time, before thought, before cognition, before rationality. Much can be gained by feeling the soma at its beginning, at its first and continuing interface with the environment.

 Animals and nature teach us that our mental processes get in the way, literally clouding our ability to feel ourselves. We are the judgmental animal. Often it is our interpretations, (self-directed or felt from others), that begin to disconnect us from the world at large. We learn not to trust our feelings. Instead, we judge our feelings as wrong or invalid. When we reconnect to the land and animals, we re-member that our immediate environment, not our mental acuity, provides the answers and affirms our sensate feelings. By becoming part of our environment we have the opportunity to re-learn how to trust our 'feelings,' our sensate responses. As a result we are better able to answer the primal questions like, "Do I feel safe?" "Am I scared?" "Do I feel connected?" "I am I doing what I am supposed to be doing with my life purpose?"

We live in a world or reality that can be described and understood in many ways. At this point we would like to look at it from an energetic perspective. We are surrounded by various forms of energy that impact our bodies in various ways. For example, vision comes in the form of frequencies of light and photons that impact the retina and are tranduced, transformed, into electrochemical impulses that are conducted through the nervous system to the primary visual cortex where they are processed as different aspects of the visual field. This information is sent to the secondary visual area where it is further processed and then to association areas where it becomes increasingly meaningful. Using other senses, the energy of the wind can be soothing or harsh depending on a multitude of interwoven factors such as ions in the air, and the dryness or moistness of the surrounding trees, dirt, rocks and water.

Being able to observe our environment and relationships as energetic phenomena expands our consciousness and ability to create new actions regarding how we relate, how we listen, and how we create change. Observing the energetic aspects of the environment allows us to have a different understanding of what is going on. For example, some people become very anxious in different situations. As they become aware of the fact that this means their bodies are becoming energized for the task at hand, it changes the effect of the energy on their emotions. We can listen to our body's responses and make sense out of it just like we might observe other aspects of our experiences. Observing the energetic nature of the other—human, horse, tree, environment—allows us to empathize more completely and change how relate to the others.

Being aware of the energetic nature of situations allows us to listen on an intuitive level. We are listening without hearing and before our cognitive interpretations form. As we attend to what we are listening to on a somatic level we notice a field effect—we are in a combined energy field of ourselves and others. Our mirror neurons are being stimulated by what we see, hear, and feel. This allows us to mirror to a certain extent what the other is

expressing and to deepen our empathy for the experiences of the other. The nonverbal elements of communication come to the foreground in the form of trust, authenticity, confidence, intention, intuition, curiosity, mind, body and spirit. Noting the energetic dimension of our experience enhances how we create change. For example, if we notice the quality of the energy of our moment by moment experience, we can discern whether there is a flow or a resistance to change.

Somatic practices can emphasize the spiritual component of self-identity in the domains of education, psychotherapy, and the healing arts. For example, you can practice yoga with a spiritual intention or you can practice yoga with a mind-body-health intention. Somatic disciplines with a spiritual emphasis vary as to whether they are dualistic or non-dualistic. Spiritual in the context of this paper, refers to the interconnectedness of our own awareness in synergy with the energy of the local and non-local forces influencing our experience. This is non-dualistic. We refer to spiritual here as connecting with the All of existence, the All of nature. Self-identity is a concept that has come into our thinking from various traditions, including the idea that the universe is becoming conscious of itself. In yoga, there is the concept of the individual self (atman) and the universal Self (Brahman). In this paper, we will consider that self-identity is referring to both the small self and the larger Self. As we are aware of nature from this expanded perspective, we are aware of a much larger self both within ourselves and the other, nature as a whole.

When we bring the spiritual dimension of self-identity into the domain of education, we can encourage the development of self-identity in students of all ages. When students connect with their sense of self-identity, they are empowered to appreciate the developmental drive toward the actualization of potential that is within all of us. This enhances the motivation to learn, the depth of learning, and the capacity to access the information that is learned in creative and flexible ways. It is this creativity and flexibility that is needed in the contemporary world. We can also make better choices in the behavioral dimension of the learning environment and beyond. This is being reported in the various educational settings where yoga is being taught in the classroom.

The spiritual domain of self-identity in psychotherapy can be seen whenever it is an inherent part of the psychotherapeutic process. This shows itself in the psychotherapeutic approaches of humanistic, transpersonal, Jungian depth psychology, somatic psychology, and some cognitive-behavioral psychology. It can also be seen in some coaching contexts and the work with horses, such as EGE, which works with horses as guides and co-leaders in the process. When the spiritual dimension is allowed to flower in psychotherapy, and it does spontaneously at times, there is the presence of inspiration, dream work, a connection with the client's sense of purpose in life, and a feeling of connection with the All. There are mood changes toward more positive self-appraisal and a shift toward greater resilience during difficult times in life and developmental stage transitions.

The spiritual dimension of self-identity in the healing arts can be seen in the growing appreciation for mind-body medicine, which frequently includes the spiritual dimension. An example, is the use of yoga in a variety of health and healing sessions from work with cancer patients, chronic pain, mental health issues, and so forth. The mindfulness-based healing approaches, fostered by John Kabat-Zinn, an American physician, have achieved wide acceptance in different parts of the United States and elsewhere. Another example, is the distant healing research of Larry Dossey and others that uses prayer and meditation to facilitate the person's healing. Research by Richard Davidson and others using neuroimaging to demonstrate changes in brain activity during spiritual experiences have been very helpful in confirming the validity of ancient claims. There is a revolution occurring in contemporary medicine that is sometimes called mind-body medicine and at other times integrative medicine. This revolution is occurring because patients are looking for complementary and alternative approaches often combined with allopathic medicine. The integration of various approaches to medicine occurs when you bring together different modalities harmoniously with the client at the center of the process. The actual integration is done by the mind-body-spirit of the client/patient. When it does, miracles can occur.

It is possible to navigate between conscious states of mind, the intuitive process and social interaction, becoming more aware of the numinous, spiritual, and energetic dynamics of our consciousness. We navigate between conscious and unconscious states of mind all the time. In western culture we have been expanding our sense of possible states of mind for the past 50 years or so; the East has been aware and practicing this for thousands of years. The West has also become more aware of being able to voluntarily change states of mind for various purposes. For example, millions of people have chosen some form of meditation and make it a part of their daily lives. Meditation has an effect on the brain as recent research has shown and people have reported for thousands of

years. Creating more meditative practices in relation to the natural world enables us to enter states of mind that include expanded awareness and receptivity to the wisdom of our bodies and the world.

Transformative Learning by Design: One Opportunity at a Time

Virginia (Ginna) L. H. Crowe, RN, Ed.D.
Jane A. Taylor, Ed.D.

Abstract

Few can deny that our healthcare system is in need of transformation. Although we are not in the position to foster grand transformational change, we find opportunities to foster small frequent change as improvement consultants and adult education practitioners in the field of healthcare. Firmly believing that small changes in action, based in a more integrative perspective, provide essential groundwork for needed transformational change. In this interactive presentation, we will share examples and our approaches, both simple and more complex, which we utilized over the last two decades to facilitate occasions for transformative learning—one opportunity at a time.

Key Words

Design, healthcare, methods, improvement, transformation, change, action

Context

Few can deny that our healthcare system is in need of transformation. In 1999, the Institute of Medicine published, To Err is Human: Building a Safer Health System making public the revelation that nearly 100,000 Americans die each year as a result of medical errors and larger numbers suffer transitory or lasting harm. In 2009, a study funded by the Robert Wood Johnson Foundation revealed that 62% of all personal bankruptcies in the U.S. in 2007 were related to medical bills and near 80% of those who filed for bankruptcy had medical insurance.

Today the healthcare system in the United States is undergoing change at a pace not seen since the introduction by President Lyndon B. Johnson of the Medicare health insurance for the elderly. Johnson's insurance plan was part of "The Great Society" in the summer of 1965, which included Medicaid coverage for people with low income. Last year ABC News noted that Obama Health Care Law Funds $1B in a Push for 'Innovation, with $30 million specifically dedicated to improving care and reducing expenses. Funds are dedicated to capital for information technology in physician practices, for healthcare deliver innovations, improvement and demonstration projects for alternative delivery models.

Transformation has become a prevalent word in Healthcare over the last decade. Robert Wood Johnson Foundation (RWJF) funded the project "Transforming Care at the Bedside" with the Institute for Healthcare Improvement (IHI). The American Academy of Family Physicians developed a delivery model titled "TransforMED" which support a patient centered focus. The transformation effort is international as well. For example, Scotland, Wales and New Zealand have all been working on change that would be transformative for patient safety (ihi.org). Although we are not in the position to foster grand universal change within the realm of healthcare, we are in a position to work within these efforts; both of us have worked both nationally and internationally to support such transformational efforts. And we are in an ideal position to support and foster small frequent change.

Theoretical Influence

Considering the philosophical framework of Zinn (1998) and Elias &Merriam (1995), we would place healthcare provider and patient education soundly in the Behaviorist theory. Quality Improvement practice and education resides most comfortably in the Progressive theoretical frame. We are practitioners in the field of Healthcare Improvement and are both greatly influenced by Progressive theory. We agree with the purpose of Progressive education to promote practical knowledge and to enhance problem solving skills; we focus on learner needs and interests, and experiences as key elements in learning design. And although we do acknowledge, especially in healthcare techniques and skills, that behaviorist methods such as lecture, demonstrate, practice and feedback can be useful, we think they are insufficient at best and perhaps damaging at worst for fostering problem-solving skills or critical thinking ability.

We are influenced also by Humanist and Radical Theory, Adult Development Theory and Post-modernism. We believe in both personal growth and development, as well as using learning and action for social, political, and economic change. Hence we are fascinated and invested in transformative learning. We believe learners are motivated and self-directed. We support praxis. Our learning designs include group discussion, team teaching, dialogue, problem posing, critical self-reflection, and embedding learning in real life situations. We do not see these theories as competing, but synergistic; the methods not isolated, but integrated and supportive of opportunity to explore and develop a more useful and complex meaning scheme. One that would better interpret experience, both individually and contextually, and enhance making of meaning of experience.

And we are always mindful of the post-modern warning:

> We need only remind ourselves of the power of terms such as 'progress,' development, emancipation and enlightenment . . . whatever emancipatory message they may contain can have oppressive consequences when emancipation becomes a search for certainty and control through definitive knowledge, totalizing explanations and the eliminating of deference. (Usher, R. and Edwards, R., 1994, p. 31)

Our Individual Journeys

Jane Taylor came to adult and transformational learning through Teachers College, Columbia University. As a doctoral student in the Adult Education Guided Intensive Study (AEGIS) program she was steeped in Mezirow (1991; 2000) and Brookfield (1986; 1995) and particularly influenced by the democratic ideals expressed by Eduard Lindeman (1926) and Robert Bellah and his colleagues (1985). She states, "My imagination was peaked, I pursued others like Paulo Friere (2000); and then, as a southerner, born in Tennessee, I was drawn to the work at the Highlander Folk School and Miles Horton (1990)." Jane continued to expand her leaning by joining an "Action Learning Set", where she notes that she learned, "how to listen, how to use action learning principles to solve problems and to communicate better. A workshop with John Heron helped with facilitation too."

Later in Jane's experience at Teachers College, the workplace learning work of Marsick (1999; 2001) formed a pragmatic bridge to becoming a scholar/practitioner. She was introduced to Daloz and Parks (1996) as well as Kegan (1982; 1994; 2001; 2009). All of these people formed a "rich stew" for her and she began to replace previously held views about leadership and management. During this time, she had the realization that, "I held a grand narrative called Improvement Science" and I was in dire need of releasing its hold on me. Even so, my improvement practice and the autonomy my clients gave me created a test bed for what I learned in the classroom, a place to practice and try newly learned concepts and approaches. And, for that I am grateful."

Ginna Crowe first experienced transformative learning during and after a disorienting dilemma called divorce and dissolution of a twenty-year marriage! It was through discussion with Jane that she began to understand theoretically what she had experienced. Ginna, a lover of learning and disliker of traditional educational structure, discovered a kinship to this area of education and began to study transformative and adult learning, eventually finding her way to the AEGIS program at Teachers College, Columbia University. There, like Jane, she was immersed in theory and experience of adult and organizational learning which changed her frames of reference and ways of making meaning.

Adult development, a familiar and appreciated topic, was of keen interest to her and she was specifically influenced by Kegan (1982; 1994). Social action was a rather new topic to Ginna, yet given her Nursing background she notes Ivan Illich (1995) "felt like a comrade." Foucault (1980), however, as well as, hooks(1994), Horton(1990), and Friere(1990:2000), "expanded and challenged my paradigmatic structure and one might say that Heron (1992), Yorks (2001;2002) , Gilligan (1982) and Belenky (1986) "just rocked my world!"

Ginna's doctoral research lead her deeper into the areas of experiential learning with authors such as Jarvis (1987; 1992), Boud &Walker(1993) and Marsick (1990, 1999, 2001), who specifically influenced her study in the area of self-directed, informal, experiential learning related to health and illness. In addition, use of Classic

Grounded Theory for her research methodology and attendance at The Grounded Theory Institute Fall 2006 Troubleshooting Seminar lead by Dr. Barney Glaser (1967;1978;1992;1996;1998) was both validating and influential. Ginna believes that classic grounded theory fits with her beliefs and experience, yet at the same time expanded her in ways she is even yet to discover.

Application

We work nationally and internationally within the domain of healthcare at several levels of human systems: bureaucracies, communities, organizations, groups, teams, and individuals. Our practice centers on the development, design, and delivery of collaborative improvement efforts applied to care delivery, process efficiency, and patient and staff experience. Given the current state of healthcare and our belief in the need for transformation, we have been compelled to intentionally and consistently weave examination and reframing of assumptions, frames of mind, and ways of being into the core structures of our collaborative consulting.

Below we describe a few examples and methods, which we have utilized over the last two decades to facilitate occasion for transformative learning. The methods are both simple, such as critical reflection exercises and learning event evaluations, and more complex, such as deconstructive critique and experience based co-design. Perhaps influenced by Grounded Theory's approach to naming categories in a very descriptive and experiential, less academic and stoic manner, we named our categories: Small Steps, Head-On and Outside Views. We conclude this section with a look into our future interest and further plans to foster possibility for transformative learning - one opportunity at a time.

Small Steps

Our first steps were ones of opportunity. For example, shortly after beginning the doctoral program at Teachers College, in the mid nineties, Jane took advantage of an opportunity to use Metaphorical Thinking. Integrating Deshler's (1990) approach and metaphorical thinking taught by the theology department at University of the South, Jane developed a Metaphorical Thinking exercise to support the un-desired merger of two diametrically different consultancies. The successful reframing of both consulting teams resulted in a new design where respect among members of the new practice emerged. From that learning, Jane incorporated some of Stephen Brookfield's (1986; 1995) work around using metaphor to uncover, explore and challenge assumptions. Eventually the consultancy groups, of which Ginna was a member, began using metaphorical thinking with its clients.

Another opportunity was a very simple change that has become a standard for our work. Just as Jane introduced Metaphorical thinking to our consulting group, she also introduced us to the writings of Stephen Brookfield, specifically the critically reflective exercises in <u>Becoming a Critically Reflective Teacher </u>(1995). Under Jane's guidance we tested variations of the Critical Incident Questionnaire (pp. 115) as replacement for or adding to learning session evaluations that were typically based in behaviorist action objectives and passive judgment of the instructor and content. The depth and usefulness of the information to improve the learning experience for the next day or the next session, plus the increased response rate, made this change quickly adapted. It has become a standard in many of the organizations in which we work, separate from our involvement in the effort.

As we learned and gained confidence, we moved from opportunity to intentionality, routinely including methods modeled in our AEGIS program, such as a concept cafe, action learning, critical incidents, critically reflective questions, and storytelling. For example, in many improvement projects it is common for the improvement teams to develop a "story board" to show progress and learning. Jane began the practice of adding reflective questions to these story boards, such as "Assumptions we held at the beginning of our work that have been affirmed" and its sister "Assumptions we held that were challenged." which fostered far more profound discussion and assessment.

Taking advantage of story's ability to surface assumptions and touch the heart, a combination she believes to be uniquely powerful, Ginna began to routinely include story as a learning exercise or teaching method. Stories are related to the content of the session and discussion of them is focused on reflection of action and surfacing of assumptions. Ginna has experienced stories of patient experience or medical harm to be particularly powerful and suggests they may have potential to foster elements of a disorienting dilemma.

A more lighthearted example used by Ginna is related to the arts. Emboldened by her witness of the impact of poetry by her AEGIS instructor Larry Daloz and bolstered by her knowledge of different ways of knowing and learning, she used *The First*, a poem written by Wendell Berry, as an introduction into the power of assumptions.

<center>The First</center>

<center>The first man who whistled</center>

<center>thought he had a wren in his mouth.</center>

<center>He went around all day</center>

<center>with his lips puckered,</center>

<center>afraid to swallow.</center>

<center>Wendell Barry</center>

Head-On

Over the years we have had many lengthy and passionate conversations regarding the awareness and use, actually lack of awareness, use, and respect, of adult learning theory, principles and methods among our improvement science colleagues, especially around transformative learning. This was often coupled with the larger topic of transformation. As noted earlier, transformation is a very common word in healthcare and applied to any number of areas: leadership, organizational structure, patient participation, incentive alignment and payment to name a few. We wondered whether and how we could bring more depth to our educational offerings and raise awareness of the concept of adult learning and transformational learning - head on.

Borrowing a concept from our improvement practice we started with a small test. As noted on the IHI website: "In 2003, through an initiative called Transforming Care at the Bedside (TCAB), RWJF and IHI created a framework for change on medical-surgical units built around improvements in four main categories: Safe and Reliable Care; Vitality and Teamwork; Patient-Centered Care; Value-Added Care Processes." (http://www.ihi.org) Jane was the Improvement Advisor; her work team allowed her a lot of leeway and she began to make presentations on transformation.

Although not a known component of Improvement Science, TCAB participants were exposed through her presentations to Mezirow's(1991; 2000) transformational learning theory. Discussion was fostered on how to develop the ability to become more permeable to ideas, more open to the views of others, more critically self-reflective, what more differentiation might look like on a nursing unit. Teams eventually began to share ways they were becoming more inclusive and integrative of the experience of others into the work. Jane even challenged the teams to create three-dimensional storyboards based on a metaphor of their choice that represented their transformation journey. The creativity and reflection through telling their story from the point of view of a metaphor was invigorating.

Our combined educational and professional background gave us a diverse and fertile field to explore for tools and concepts from other academic disciplines that support examination of assumptions. For example, the Ladder of Inference. This tool is based in the work of Chris Argyris (2000) and described in Peter Senge's seminal work, The Fifth Discipline (Senge, 1994, pg 242). We use this tool to directly focus on the concepts of assumptions and beliefs that drive and support our behavior, and as a lead to introduce the theory of transformative learning.

Every year the Institute for Healthcare Improvement (IHI) has a National Forum. Attendance has grown for the main conference to around 5,000 on site attendees and around 10,000 virtual attendees. With Kegan's blessing, we decided to propose a workshop at the IHI Forum based on the work of Kegan and Lehay 's book, How the way we talk can change the way we work: seven languages of transformation (2001). We were accepted and that year he first we offered a 90 minute workshop. During the workshop we proposed that transformation was more than just change, but a change in assumptions. Over 150 people attended and evaluations were favorable, although not enough time was a major theme.

The next year we proposed and were accepted for a one-day pre conference mini-course. Our mini-course offering has now continued for five years. In addition, we have expanded the core group of people who teach with us, teaching them the topic and the content. We have been encouraged with the results of this approach and have expanded this approach. We have utilized the content from this mini-course and developed new content for many differing presentations in length and scope that address head-on the concepts and theory of transformative learning and the associated methods.

Outside Views

Within the field of Quality Improvement, W.E. Deming is an acknowledged foundational leader. Both of us are well schooled in his Theory of Profound Knowledge (SoPK), and although we both have seen the System of Profound Knowledge adopted as a grand narrative, that does not negate value or usefulness in the theory. Deming was known for challenging cultural beliefs and assumptions, such as extrinsic motivation, and destructive competition – replacing it with win/win and a yearning for learning. He spoke of leadership transformation and espoused looking at system problems rather than blaming the worker. And he believed, as do we, that a system cannot understand itself and transformation requires a outside view. (Deming, 1982; 1993).

We find Deming's views compatible with processes, such as critical reflection on assumptions of others or of our own, reflective discourse with others, which validates or provides justification of the new insight and action, described by Mezirow (1991; 2000) and Cranton (1994) as central to transformative learning. We believe action is integral to both transformative learning and to improvement theory. It can range from making a decision to radical political protest.

One action we have experienced and practiced which supports an outside view and reflective discourse is the involvement of patients, our customers, in our processes and the improvement of our processes. Hence, we work tirelessly to include family and patients in the design of their care and to establish oversight of our work as advisory board members and we most like putting patients and family members directly on healthcare improvement teams where they can bring their outside knowledge to bare. And we are not alone.

- In 1991, the Ryan White HIV/AIDS Program was established. A core value of the program is participation of consumers in all aspects of program. Consumers are members and leaders of planning groups, participate and lead consumer advisory boards to provide improvement ideas and opportunities, support peers and assist in engagement and retention of care.

- In 1992, the Institute for Patient- and Family-Centered Care, a non-profit organization was founded. This organization has provided leadership and action to advance the understanding and practice of patient- and family-centered care

- In 1999, the National Initiative for Children's Healthcare Quality (NICHQ) was founded as an independent, not-for-profit, quality improvement organization dedicated to improving healthcare for children. Since inception, NICHQ has not only placed family members on their improvement teams, they have established the position of a family Co-Chair with the clinical expert.

- In 2011, the IHI added patients and families to IHI staff and board positions. In addition, over 60 patients gathered at the 2011 National Forum, many of them presenting or co-presenting workshops.

We have both been involved either separately or together in all of the above initiatives or organizations and many more. We wholeheartedly believe in and support the transforming aspect of patient participation and partnership.

Future

Recently, Jane's professional interests led her to become a collective narrative practitioner and a fledgling in one of the social sciences called constructionism. As a narrative practitioner, she has begun to work with groups and teams to see how they have overcome difficulties in the past and may rely on the same skills now to face today's difficulties. Work teams learn to recognize and appreciate each other's strengths and the very values and dreams that they brought with them into the healing arts. Jane has become more inclusive of other approaches and integrated them into transformative learning theory to work with groups to recognize the experiences and unique abilities of team members and how they can reflect openly, together on how their values, beliefs, ideals and practices can reinforce and magnify their efforts in positive and respectful ways. As she learns about the use of relational construction – ample integrative opportunities exist to bring narrative, transformative learning theory and social construction together for transformation.

Ginna's recent interest in improving her public speaking and learning to tell a better story led her to a Transformational Speaking immersion workshop lead and designed by Gail Larsen (2000). What she experienced was an amazing example of a workshop designed to foster transformational learning. During their discussions, Gail revealed that having never heard of the theory of transformational learning, said she just did what appeared to work! What a tribute to humanism and to transformative learning. Gail and Ginna have future plans to continue their transformation and learning conversations. Gail is interested in the theory of Transformative Learning, while Ginna is interested in exploring her learning design that created such a safe- haven for examination of assumptions and restructuring of frames.

As we look forward to challenges, we wonder how to foster transformative learning in a virtual environment where learners attend synchronous webinars and face distractions of competing priorities like the ubiquitous demand of emails. How might it be possible to hold a learning space without empathic human presence? How can transformative learning be fostered without place or space, when learners return to their work after a webinar that is just a short punctuation in their day? And, where there is not appetite or time or support for reflecting writing or blogging.

Conclusion

Our story is simple, the journey of two practitioners united in purpose to foster transformative learning by introducing approaches that we experience as personally transformative into our professional work setting. We have seen how transformative learning flourishes in others' work and are reminded that changes of heart, habits and mind lead to changes in action. These changes in action from a more integrative perspective provide a foundation for transformational change. We would be honored to share what we have learned regarding intentional design to support deepened meaning-making and informed action.

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Theoretical Convergence Leads to Transformative Learning and Change

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Abstract

Building on historical models, the authors present a pathway for anticipating and molding significant change. The authors have been involved in the development of an initiative termed Transformative Learning at the University of Central Oklahoma that is operationalized through High-Impact Learning Practices similar to those described by Kuh in 2008. Six categories (termed the "Central Six") of activities directly connect experience to the transformative process. Characteristics of this model are overviewed with an accompanying examination of how selected theoretical models can help us to understand and institutionalize change.

Keyword

Change, higher education, paradigm, transformative learning

Nearly one decade ago the University of Central Oklahoma (UCO) embarked upon a pathway designed to embrace changes in Higher Education that were becoming increasingly evident not only to the campus but to the nation as a whole. Namely, that the role of direct experience is critical to the way in which we should approach education. The campus has, during this period of time, developed a six-part initiative termed Transformative Learning (TL) that was designed to operationalize experience both within and outside the formal curriculum of the university. We find Kuh's conclusions about High-Impact Learning Practices to be highly compatible with the conclusions we drew during the pathway to our own TL practices (Kuh 2008, Barthell *et al*. 2010). Below, we describe the pertinent components of TL and provide an overview of models that predict systemic change of the nature we are observing in Higher Education.

UCO's six areas of TL include (1) Disciplinary Knowledge; (2) Leadership; (3) Research, Scholarly, and Creative Activities; (4) Civic Engagement and Service Learning; (5) Global and Cultural Competencies; and (6) Health and Wellness. TL may occur within or outside the traditional classroom environment but creates an experience that is intellectually challenging to the student precisely because that experience contrasts with the traditional classroom experience (of recapitulating prescribed content as delivered in a lecture format). This practice is manifested physically on the UCO campus with the recent addition of the Center for Transformative Learning, a building within which experimental approaches to teaching (emphasizing TL) are emphasized on a daily basis (see description in ASU 2012).

Several specific examples of TL practices occur on the UCO campus, and these have largely resulted from a collaborative effort across administrative divisions (see Barthell *et al*. 2010). However, in an overall environment of decreasing funding to public universities, many of our approaches have been focused on externally funded avenues that conform to the "New Normal" and, in the case of one author (JB), administrative responsibilities have largely focused on how to fund faculty-driven, student-centered research practices (Barthell 2012). This involves creating an argument that non-traditional experience (research) at a regional university can be justified through returns in revenue and student learning objectives. This transition is increasingly widespread, with a similar movement now emerging among community colleges (CCURI 2012).

Central Question - Can You Direct Radical Change?

The authors answer this question in the affirmative, based on their experience at UCO. What follows is two-fold. First, we present a brief review of some of the change theories that can provide a basis for understanding the extent of the changes occurring in Higher Education. Secondly, we suggest a pathway (with examples) of how one might negotiate the change.

Theories of Radical Change

Change processes have been categorized and described by many authors, but much of what has been written is not descriptive of genuine transformative change. Changes occurring in the world today are of a different level than we are accustomed to and require a deeper understanding of the processes that cause change. The tools of incremental change, whether at the individual or organizational level, are not always sufficient to address the current environment. The use of incremental change approaches, usually with new programs, can actually inhibit the adaptability of the organization or individual and ultimately have a self-destructive impact. Indeed, crisis often provides opportunities for organizations (systems) to change in a productive manner.

Change models from Kuhn (1962), Watzlawick *et al*. (1974), and Mezirow (2000) provide insights into radical change, change that is not well understood within the context of existing perceptual frameworks. These three models describe significant change of the scale that we are experiencing in technology, education, and globalization today. Building on these theoretical foundations, the authors present a model for anticipating and molding significant change. This model incorporates the concept of future scenario development as described by Herman Kahn and the Rand Corporation in the 1940s and 1950s (Abella 2008) and Sherwood's (1972) planned renegotiation model. These approaches allow for the examination of existing rules that define the current situation, trending rules, and the creation of future rules that synergize the old and trend toward a sustainable future.

Kuhn and Scientific Revolutions

Kuhn's model (1962) of thought change in the scientific community is discontinuous in nature, with major shifts between incompatible theories that characterize change in the state (and pursuit) of knowledge. Initially, members of the community practice consensus building through Normal Science practices that have been likened to a crossword puzzle, with specific rules that determine the bounds of the inquiry process. As anomalies begin to emerge, accumulate, and challenge the accuracy of a paradigm, the participants must traverse a "crisis stage" during which time a sudden and rapid transition in thought eventually produces a "scientific revolution".

In association with the crisis stage, participants of the community begin to experience a "gestalt change" wherein they interpret the same evidence in a new way. This re-orientation of one's interpretation is presumably a direct response to the disorientation that accompanies a crisis stage, forcing new reference points upon the individual participants. This reconfiguration in thought is the basis of the paradigm shifts that ultimately forge the scientific revolutions that encompass entire arenas of scientific endeavor. Kuhn's concept of wholesale change and the human realization (and resistance) that accompanies it appears to describe well what is currently at work on many university campuses.

Mezirow and Transformative Learning

Mezirow's perspective on TL differs in that his focus is primarily on the individual and the individual's capacity to change (Mezirow 2000). His views are much more individualized in nature than Kuhn's and, in this regard, are more closely aligned with Watzlawick *et al*. (1974 - see below). Change occurs when an individual significantly alters one's perspective on the world and a reference or "meaning perspective" is changed in the process. A meaning perspective involves the emotional, the cognitive, and the conative dimensions of understanding the world. Consequently, the worldview is no longer the same, and return to the old view is not likely.

Mezirow describes a "disorienting dilemma" that can lead to rapid change in the perspective of the individual. It is this scrambling of one's original frame of reference that allows for and provides a path to a new way or ways of interpreting one's life experience. The individual does not escape the context within which he/she lives, but liberation from old and other formulated confines can occur (Mezirow 2000). It is this changing of frame of reference and the meaning making that Mezirow presents us with that is most useful for those of us in educational settings. It is not that educators provide a direction to personal transformation, but that they assist the individual in self-reflection and the examination of long held assumptions. The dogmatic prescription of content within the classroom, though still needed at a basic level, gives way to a more practice-based approach to ideas. This process is similar to what Kuhn describes as anomalies to an existing state and that suggest that the current set of rules are failing to accurately describe the world.

Watzlawick and Second Order Change

Unlike Mezirow who focused his own work almost exclusively on individuals, Watzlawick *et al*. (1974) were well attuned to issues of systems and game theory thereby expanding his discussion of transformation beyond the individual. Using a different language and theoretical base, Watzlawick distinguishes between first and second

order change. First order change occurs within the prevailing system and consists of changes that stay within "the box". In individual as well as organizational life most of the changes experienced are within this first order, at times referenced as incremental change. Second order change is "one whose occurrence changes the system itself" (Watzlawick *et al*. 1974).

Watzlawick *et al*. (1974) proposed a significantly different approach from Mezirow who offered the educational model whereby an educator might create opportunities for the individual to question and examine his or her current frame of reference. The "brief therapy" approach of Watzlawick *et al*. allowed for the therapist or change agent to analyze the rules of the existing system and then to create (in Mezirow's terminology) a disruptive dilemma that would force recognition of existing systems and their rules. That intervention would take the individual out of the proverbial "box" and put them in a position of talking about the box (forcing the individual into meta-communication). Kuhn's view is perhaps more passive in that the violations of existing rules are not pressed, but emerge as part of the scientific inquiry itself.

Leading into further discussion of creating a desirable change is the issue presented by Watzlawick that "first-order change is attempted where only second-order change can lead to a solution" (Watzlawick *et al*. 1974). It is the understanding of the authors that in Higher Education specifically and in many other areas of life today we are experiencing second-order change, a paradigm shift, transformative experience that cannot effectively be dealt with by staying within the existing paradigm.

The Baby and the Bath Water
The change models presented above all describe significant changes whether they are called transformative, paradigm shifts, or second order. They each describe changes that are ultimately irreversible and radically different in perspective. Globalization, information access via the internet, and the advent of social media are among those radical changes. Within Higher Education the authors have identified several anomalies that indicate the level of change (Barr & Tagg 1995, Cunliff & Barthell 2011, Mehaffy 2012). A simple example will hopefully suffice and pertains to other arenas of change beyond Higher Education.

The number of individuals with access to existing and new knowledge is almost incomprehensible to those who grew up with card catalogues in the academic library. When a child can sit on the steps of a library or his or her own home and access information on any subject, the role of an educator as transmitter of information is certainly challenged if not made utterly obsolete. The possibility that we might retain an educational system of traditional lectures is difficult to imagine. However, the lecture has perhaps been re-conceived with Youtube.com and TED.com, or Massive Open Online Courses (MOOCs), where the support for the knowledge transference ranges from expert to amateur and "no cost" to several thousand dollars in "production cost" (see an overview of course models in Mehaffy 2012). Knowledge transmission is still important, and good knowledge transmission is important, but it is no longer the sacred domain of a formal educator or faculty member.

Kahn and Sherwood
About ten years ago one of the authors (EC) was working with a group of librarians and asked them to draw a picture of the library of the future. One individual drew a great room with one individual sitting alone in the middle in front of a computer. Focusing on existing trends can lead to such a narrow (but useful) interpretation of future possibilities. Hermann Kahn, working with the Rand Corporation in the 1950s, developed a model of scenario development as a means of better understanding the future. The idea was simply to approach the future as if you were already there, much as people do with computer-assisted virtual worlds today. It allowed for a thoughtful examination of possibilities, the impact of different trends, inter-relationships of apparently disparate factors, and it helped to raise a host of questions. As scenario planning is often conducted, the stories are built upon existing trends.

Sherwood and Glidewell (1973) developed a group life-cycle model called the Pinch-Crunch Model. They described a simple progression of a group from initially coming together and exchanging expectations, to a period of role clarification and stability, and ultimately to a disruption (Abella 2008). What the authors have borrowed here and connect to the work of Kahn, is the anticipation of the disruption and the ability to act upon it. Sherwood and

Glidewell suggest that the period of disruption leads to one of three alternatives: a return to the "good old days" based upon the original understanding, a termination of the relationship, or a possible renegotiation of the relationship based upon new information.

A Synthesis and a Process

What the authors offer is an early and personal synthesis of the understanding of radical change and the idea of scenario planning and the renegotiation concept that is inherent in the Sherwood model. The process simply involves an identification of a current anomaly, examination of the current process or rule for those elements that represent positives that would be beneficial for the future, and then a shaping of the scenario to recognize the change and incorporate positive elements.

An example will help demonstrate the model. For the past hundred years higher education has employed full-time, often tenured, faculty members. The current trend is toward the part-time, adjunct or contingent faculty member who teaches one or two courses a semester and who is unlikely to have major responsibilities outside of conducting his or her classes (see Williams 2012). Such contingent faculty members comprise about one fifth the total cost of higher education at our institution. Particularly for public institutions that have been experiencing a downturn in state support for several years, the use of part-time faculty is tempting. As the practice changes from the use of full-time to part-time faculty for economic purposes, the ultimate trend would be toward the reduction or loss of the full-timer, replaced by, as is currently done in some for-profits, a standard curriculum implemented by adjunct faculty.

If an examination of the benefits of both full-time and part-time faculty is completed, however, there are clearly elements of the full-time faculty to carry into a sustainable and positive future. The full-time faculty member provides counsel, support, and a connection to the whole of the degree process while the part-time faculty member may bring practical, day-to-day experience that comes from working actively in a non-academic profession. The challenge, then, is to combine the positive elements of both models into a future scenario. It could vary tremendously in design but, as with all scenario planning, it allows the institution to actively examine different options. A scenario might then develop such that there would always be sufficient full-time faculty members for advising all students in the major and contributing to service requirements of the institution. Although many institutions are already in this condition, we advocate a strong role for full-time faculty members at our institution given its emphasis (as described above) on experiential (TL-based) learning objectives.

Conclusion

As depicted well by others (Barr & Tagg 1995, Mehaffy 2012), Higher Education is embarked on radical change wherein methods of instruction are becoming virtually incompatible: the "sage on the stage" versus the "guide on the side". We posit that, even with current economic constraints, the educational community should embrace these changes now rather than have them dictated to us by economic factors. Indeed, the preservation of student learning objectives remains one of the most important factors we must protect in the face of radical change. Such student-centered activities as outlined by Kuh (2008), and as we have attempted to practice them on our campus (Barthell *et al*. 2010), may be one pathway for contending with this change.

In nearly all of the models described above, change is accompanied by crisis or disorientation to the learner. If true, we must then begin to cull out the prescriptive models of the past when they are not essential to the foundational elements of the discipline being taught; a similar realization occurred among graduate educators at US universities and is now spreading to undergraduate institutions. As convergence on this approach occurs, we might very well expect a synthesis among two- and four-year institutions whose roles in society are beginning to blur at their traditional boundaries. With increased scrutiny on the use of taxpayer-based funding to universities (whether directly through state appropriations or indirectly through federal granting agencies), a place for workforce development in the curriculum is growing.

Our goal in reviewing these ideas is to join a growing group of educators who see that the metaphorical train is leaving the station on opportunities to effect productive consequences to radical change in Higher Education

(Carlson 2012). Though perceived as a crisis by many, we contend that this is also a time of opportunity when new ideas can be implemented that will ensure a vigorous model for Higher Education in the future. We predict this new system will not necessarily be the one of the two-dimensional computer screen as much as reorientation and reaffirmation of the role of experiential learning and full-time faculty members in Higher Education.

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Compassionate Presence
"How May I Serve You?"

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Abstract

Education and learning are as natural to us as breathing. It simply occurs in the spirit and soul of every human being. "Thriving" is our natural state of life and life is meant to work and our purpose is to thrive! If the purpose of education is to live outside the walls of education, then why or how do we end up teaching in ways where Language Arts, Math and Science assessments define our adult entry into this diverse and populous world; externally labeling us successful, smart and college bound? Does going to college equate to a successful life abundant with well-being? Are we respectful and accepting of our differing preferences, perspectives, innate gifts and passions?

Make Your Mark Heavy and Dark

On a recent Friday afternoon, an unemployed twenty-year old posted a message on YouTube, simply offering to "be there" for anyone who needed to talk. "I never met you, but I do care," he said. By the end of the weekend, he had received more than five thousand calls and text messages from strangers taking him up on his offer. (Retold by Dr. Howard Cutler and The Dalai Lama, from The Art of Happiness in a Troubled World.)

What kind of mark do we leave on our students, our children and our own lives? Do we value the entertainment and professional sports industry to the degree of insanity, paying twenty to thirty times the income of that of an effective, caring and creative educator's salary? How do our children and young adults perceive this societal and cultural truth? Do we truly value education in a way that we are willing to re-assess, explore, question and discuss a novel and philosophical perspective buried at the root of teaching and learning that shifts the way we prioritize, view and act upon the present dysfunctional educational system? If students are not learning, then education is not happening, and as Sir Ken Robinson clearly states in his revised tenth anniversary edition *Out of Our Minds*, we need to clarify and redefine the purpose of education, and this begins with personalizing it. We can't afford not to!

There are three themes that run throughout this contribution. These themes do not provide answers, solutions or suggestions for expedient and radical changes, but they do invite the reader to explore the roots of a system that is crying out for changes at a macro and micro level of functioning.

1. How do the personal and collective perspectives of educators, parents and students affect their happiness, success and motivation in school and in life? Do we hold a victim perspective in which experiences, actions and words just occur without our conscious or subconscious participation, or do we hold a perspective that embraces self-design and co-creation?

2. Questions: What do you need? How may I serve you? What can I do? Questions fuel our minds with wonder and options, and they are vehicles for creative solutions and critical thinking skills. When we ask another what he or she needs or desires, we open doors of resistance as defense mechanisms break down and begin to fall away. Building relationships through inquiry, while sustaining them with a steadfast "trust," not only deepens learning, but creates a safe place for self-expression and exploration.

3. Story-telling, personal and communal, has the power to affect the way we ingest, understand and manipulate information and experiences. I once read that there are no new stories or ideas, just new ways of presenting these reoccurring themes and tales. When we listen to another's storyline, we may embrace an epiphany, an insight that we have long awaited inside our own lives. It just may be that word, expression, paragraph or restated theme that strikes a chord in our minds and hearts, changing the way we walk through this world.

Although these themes do not provide answers to the questions posed, my hope in sharing personal narratives, inquiry, and research, based on perspectives, positive psychology and the process of happiness, is to

engage the reader in exploring positive shifts that begin inside one heart, one mind and one individual at a time. How may I serve you? This is where the trajectory of educational reform begins and ends. As educators, and parents, have we become so concerned about effective instruction, accountability, teacher evaluation, higher and competitive test scores, global economic rivalry, and college acceptance that the joy of teaching and learning has been severed from the creative equation and process of teaching and learning? As parents and educators, are we feeling stressed to the point of exhaustion, apathy and indifference with changes that feel out of our control? Open up and look inside. Look inside your own heart at the perspectives that keep you churning uncomfortably, wearingly or happily inside a pool of emotions and thoughts. *Make your mark heavy and dark…*

You can never cross the ocean unless you have the courage to lose sight of the shore.
~ Christopher Columbus

Teachers change lives! For better or worse, their presence with students affects change. School environments, administrative policies, and content expertise do not hold a candle to the gentle "personal philosophy" that radiates from teachers who create connections and relationships with their students. Techniques, strategies, and methodologies are important, but we must begin with a compassionate philosophy, an educational spirituality, as the building block for securing happy, effective, and creative students, teachers, and parents. This philosophy must be discussed and shared because as simple as it is, we have forgotten the power of a compassionate presence. Compassion discussed, revered and implemented is the warm conversation we must return to. It is a conversation that must become solution oriented rather than problem oriented, which takes incredible awareness, reflection, and a shift in attitude. Spirituality and education? Be wary of linking the two together, because we are a nation and world that appears to stress competition, growing global economies and mastery of curriculum interspersed with rigor and assessment, assessment, and more assessment.

Read the newspapers, technology links, and headlines. Don't discuss the communion of education and spirituality unless you are referring to parochial or private school culture. This is *public education*, paradoxically, an entity that is starving for a compassionate unity of function, but emphasizes assessment, higher test scores and turn around programs to the detriment of addressing the social and emotional needs of every child and adolescent.

Why would we need a spiritual, compassionate educational foundation? Let me ask you a question. How would you like to "feel felt?" "Feeling Felt" is a term coined by Dr. Dan Seigel, psychiatrist, author and advocate for "mindful awareness," a strategy implemented to focus attention and awareness in everyday experiences. *Feeling felt* is what we all yearn for at the core of our being. Students who "feel felt" begin to feel successful and capable, demonstrating improvement on test scores, self-regulation and levels of motivation. They are able to apply their latent potential and prior knowledge in and outside of school, complying with rules and regulations even though they disagree.

Do you feel felt? Do you feel understood by those you deem important and significant in your life? This concept and quality of character development in its finest moment rests at the core of educational reform. Yet, "feeling felt" is initiated when we learn to take care of ourselves; when we nourish our bodies with adequate sleep, nutritious food, and exercise. We begin to fill our minds with positive thoughts, creative options, and a bit more hope. Often times, this is not easy when we are sitting in the habitual trenches of family and educational upheaval and change. Yet, when we practice listening to that intuitive inner teacher, the heart, we strengthen and multiply our creative alternatives and choices for problem-solving. Creative visualization and quiet reflection literally change our experiences, thoughts and words when we are receptive to the possibilities.

We can ill afford not to begin with this philosophy of compassionate presence, because the research is exploding with findings and studies that the brain is wired for relationships, and that positive emotion and optimism, coupled with feelings of self-worth and success, initiate motivation and drive learning, retention and retrieval of knowledge to new heights. The desire to feel successful deepens learning and is the emotional prerequisite for applicable intelligence and a process for happiness, intimately addressing the emotional and social aspects of education.

One year ago, on a Saturday afternoon, I desired nothing more than to write the final words of my manuscript. I received an invitation from a graduate student who asked me to have a sushi lunch and talk about our school years. As the green tea was poured, she looked at me, hesitated and said, "Lori, it has been a tough few

weeks, and I want to tell you what has happened." Candace squirmed a bit, played with her chopsticks, and then began to share this story.

Javier's Story

Javier became my student in mid-November after being kicked out of his large high school for absences. It did not take long for me to understand the reason Javier was absent so much from his previous school—he was reading at a fourth grade level and had already been retained three times in his life, making him 16 years old in the 9th grade. Javier avoided school because he did not feel successful, but that changed once we started working together. Javier began to come to school regularly, worked hard in school without any behavior problems, and even happily attended Saturday tutoring to get additional help. Al-though Javier showed tremendous progress with me and an intense desire to learn, his progress was not fast enough for my school principal, who decided immediately after winter break that it was time for Javier to find a new school. The school I worked at had just opened, and my principal was concerned that Javier would bring our End-Of-Course Assessment scores down.

I did not fully understand the resoluteness of my principal's words until four weeks later, when my principal suspended Javier for three days for wearing black shoes instead of the required white, on an afternoon when I was out of the building. Upon returning to school, I learned of the incident and was extremely upset since the typical punishment for dress code violations was an after-school detention. When I inquired about this unusual disciplinary action, my principal again reiterated that it was time for Javier to find a new school.
Javier and his mother were required to meet with the principal prior to his being allowed back into school after his three-day suspension. Javier's mother asked me to come with them to the meeting because I had established a strong and trusting relationship with the family. While being forced to wait for thirty minutes before the principal would meet with us, the three of us watched as five children walked through the office wearing black shoes!

Once the meeting began, my principal opened the meeting by telling Javier how far behind he was academically compared to his peers and that it was time for him to find a new school. Javier and his mother explained that this was the school they wanted, so my principal shifted back to the issue of the black shoes. Javier explained that he and his mother had been evicted the day he was suspended and had been homeless for the past three days. His mother would not have enough money to purchase him shoes for two weeks, so he wondered if he could wear the black shoes until that time. My principal forcefully said, "No. He needs to have the shoes today or he is being kicked out." I offered to purchase Javier a pair of white shoes in order for him to remain at school, but his mother turned to me and said in Spanish, "It is not about the shoes. The principal no longer wants my son here. It is time for us to find a new place to go."

With those words, Javier was gone from school and my life. Statistically, there is little chance now for Javier to ever graduate from high school. He is currently homeless, Latino, speaks English as a second language, has been raised in a single-parent home, and has been retained al-ready three times in his life. With such ease, my principal traded Javier's future for one less "fail" on the standardized test at the end of the year. As a teacher, this experience makes me wonder what the goal of education has become. When I chose education as a career, it was to work with the tough cases like Javier in order to change my students" life trajectories, not to allow them to become another sad statistic.

Following Candace's story, I just sat there. I couldn't find any words to describe how I was feeling, or more honestly, what Javier and his mother must have experienced and felt. I share this story because no matter the grade level, age or gathered experiences from teachers and students, educators must embrace and integrate the emotional standard of compassion, extending to our parents and students the power of "feeling felt." Compassion is defined as "a combination of feeling for someone else, experiencing the suffering and a positive move to reduce the suffering of others." Are we truly compassionate with one another? Do we extend to one another even a small invitation to see and express what is possible and all that is going well? As parents and educators, we must begin to implement this emotional support that drives all that we are and do in and out of school.

I can't type fast enough as I almost feel desperate to share these words, because students like Javier comprise the intellect, the emotional intelligence and heart to be successful, to contribute to another's well-being and to exercise their innate intelligent birthright. However, administrators and teachers hold the power to nurture or kill it off. I am grateful for Candace's presence in Javier's life, and it is my hope that a part of him will remember all that is possible, and what this special teacher saw and nurtured inside him.

One final thought comes to mind focusing on teacher effectiveness, learning outcomes and student growth. It has been brought to my attention and to the attention of educators across the country that the future platforms for assessment of teachers that state and national political and educational reformers will be putting into place will qualify and quantify student growth based on standardized test scores in each classroom and school. This is precisely the reason that the aforementioned administration at Javier's school wanted him out. Candace is one of the most effective educators I have known, creating relationships, building a sense of self-esteem and incrementally raising academic achievement, but her students still fall far behind. She is challenged with a diverse culture of children and adolescents who do not fit into the western world's educational factory model of instruction and assessment. I realize there is not a perfected measurement for our diverse, dynamic and vulnerable learners, but how can we implement such ineffective, short-sighted instruments knowing all that we do about our nation's growing and rich cultural diversity?

We claim that children in our inner city schools are not learning but that is incorrect. These children learn everyday and in some way, much too soon before children should learn these things… and we fail to notice what it is they know and have learned.

Through one lens I see: Assessment, Common Core Standards, Charter Schools verses Public Schools, No Child Left behind, Race to the Top, Teacher Evaluations, Impoverished Environments , Failing Schools and a No Excuse Culture Through another lens I see: Hopefulness, Resiliency, Optimism, Experiences changing the Brain, Emotional Engagement, Enthusiasm, and Inquiry.

I observe teachers; new and veteran teachers trying to save the souls of the world and in the meantime, their hearts and minds grow weary, tired, feeling depleted, diminished and   overwhelmed. They begin to mirror what they see in their students. I am concerned because when negative emotion overrides positive emotion, immune systems are compromised, cognitive skills narrow, and solutions and change opportunities become stuck and frozen in repetitive thought processes.

There has been much recent work in the field of educational neuroscience, tapping into those social and emotional skills that can be learned and are an integral part of well-being as we generate solutions, creatively think through problems, emotionally enter into sustaining relationships, managing our lives with improved thinking and positive affect. Our neurobiology is wired for relationships, empathy, stories and service! We have quietly forgotten this in this time of standardized testing and data driven instruction that our neurobiology is wired for pleasure, patterns, novelty and prediction. When we emotionally engage our students, tapping into their unique brains, we begin to create dialogue and questions that that can create capacity, rewiring and strengthening neural connections based on enriched experiences. But most important, in this process is our own evolution and the possibilities that we generate when we self-reflect, question, and serve one another. When we begin to feel better our worlds shift and nothing propels our personal well-being more than service.

"The everyday experiences we provide in our classrooms and homes can structurally and functionally change the brain"

National Core Standard—Compassionate Curriculum

A compassionate curriculum will be explored and discussed in three parts. First and foremost, we must ask one another what we need. *How may I serve you?* When we do not understand the needs and thoughts of one another, tempers flare, agitation brews, and we lose sight of the aptitudes, skills, and gifts each of us contributes to this educational cauldron of diversity. Misunderstanding directs our actions. Secondly, we must listen where understanding another's mind and heart is activated. We listen in a space where we do not listen to respond, but listen to understand. The third component of a compassionate curriculum is "self-reflection coupled with creative design." When we understand the needs of our students, parents, children and colleagues, we can begin to create meaningful and relevant subject matter, experiences, and opportunities that germinate a desire to be invested in this educational process.

Now we must include the most significant interpersonal skill that all people need when creatively relating to one another- empathy. When we empathize with our students, colleagues, and parents, we intuitively open our eyes to a perspective that might not have been discovered or understood before asking the question, "What do you need? How may I serve you?" Next, at a distinct interpersonal depth, we listen beneath behaviors and even words. Listening for direction and feedback, we are able to design ways to stay emotionally connected with increased

understanding. This is the place where education begins and ends. When we guide our students to reach "within," to the heart, we inadvertently discover *our* passions, aptitudes and strengths as well. Old habits die hard, and it is only through practice and repetition that innovative ways of relating to one another, along with new experiences, become permanent.

Before you read another page, try this little experiment. If you have found yourself struggling with someone—a family member, business partner, co-worker, etc.—feeling agitated, annoyed, or misunderstood, approach the person and the situation in a novel way, with an intention to ask and listen: How can I make this easier for you? What do you need? How can I help? Then observe. Observe the angst, anger and frustration gradually slip away as the question is posed and received with a bit of surprise, sincerity and authenticity. This is where the magic of discovering empathy for another begins to open pathways of understanding and creative exploration. The processes of learning and teaching are now present and activated as cooperative and collaborative components, where broadened perspectives drive compassion and ultimately breed exceptional teaching and learning.

Isn't it time to place angry and agitated nationalism, separatism, world wars, exorbitant military spending, and an intense intolerance of one another into a locked box? Isn't the classroom the place where emotional and social skills are nurtured, diversity discussed, and dialogues begun? This worn-out container of conflicted notions holds the old stories of pedagogy and political baggage no longer applicable in this world brimming with possibility of global communication and collaboration. There is no greater time for implementing creative service to one another, embracing a conversation that holds compassion in high esteem and a national standard that will enhance the acquisition of educational content and skills needed in this ever-changing world.

I am excited for the day when my children and grandchildren will be video conferencing with students from Japan, India and China who together will create a communication and performance-based assessment that will align our countries with a deepened respect for the rich diversity each holds, rather than worrying and placing competitive edges inside the hearts and souls of those who were born to relate, to inquire and wonder! We now begin…

Offering
This work I do is an offering
from my hand and heart.
Let the imagination awaken the power that
is within each student, releasing healing communion throughout the world.
~Shelley Richardson

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Entering the Field: Transformative Learning Praxis Informing Cross-Cultural Research

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Abstract

Cross-cultural research, once the domain of anthropology, is now a fundamental aspect of every academic discipline. Preparing oneself with a basic knowledge of the culture one is entering is important, but offers only the bedrock for a meaningful encounter. Cultural sensitivity demands building relationships and assuming responsibility for collaboration with local stakeholders. It requires sensitivity towards local language, norms, and customs. In this sense, it is a new learning process for the researchers themselves. This presentation offers transformative learning praxis as a framework for underpinning the design of cross-cultural participatory research, highlighting how this approach has led two transformative learning practitioners in research with village groups and community based organizations over the last seven years in Africa.

Keywords

Transformative Learning Praxis, cross-cultural research, participatory research, research design, cross-cultural competencies

Transformative Learning Praxis

Cross-cultural Research

Cross-cultural research, once the domain of anthropology, is now a fundamental aspect of almost every academic discipline. Researchers are working with projects in a variety of settings and with a combination of persons from a multitude of cultures across the globe. In reflecting on transformative learning, Duveskog, Fris-Hansen, and Taylor remind us of "the context-dependent nature of the theory" (as cited in E. Taylor & P. Cranton, 2012, p. 564) and challenge us to move beyond Eurocentric perspectives towards greater cultural relevance in research and practice.

In conducting cross-cultural research, there are several cultural sensitivities to be carefully considered. Researchers need to have the following skills and qualities for the success of their research: "tolerance for ambiguity, patience, adaptiveness, capacity for tacit learning and courtesy" (Laverack & Brown, 2003, p. 334). To collect excellent and reliable data from individuals from different cultures, researchers need to develop a trusting relationship with their research participants and establish a good rapport for maintaining cultural sensitivity (Laimputtong, 2008, p. 5). Solomon Benstar and Peter Singer (as cited in Laimputtong, 2008, p. 13) advocate that for any ethically grounded cross-cultural research, there must be an understanding of the participants' "world view or value system."

Preparing oneself with a basic knowledge of the culture that one is entering is important, but offers only the bedrock for a meaningful encounter. Cultural sensitivity demands building relationships and assuming responsibility for collaboration with local stakeholders. It requires sensitivity towards local language, local norms, and local customs, as well as the political context (Lange, 2012). In this sense, it is a new learning process for the researchers themselves. Whether an insider or outsider to the culture being researched, it is important to "adopt a reflexive stance, which involves being sensitive to the ways in which the researcher as an individual, with a particular social identity and background" is shaping the study (Pope and Mays, as cited in Irvine, Roberts & Bradbury-Jones, 2008, p. 37).

The Framework

Transformative learning praxis is offered as a framework for underpinning the design and methodology of cross-cultural participatory research. With an emphasis on critical reflection, transformative learning theory provides a model–constructs, language, categories and dynamics – to enable others to understand how adults act in various cultural settings (Mezirow, 2009). Transformative learning theory also has implications for personal development of the emotions and the concept of self (Kang, 2007), as well as behavioral development (Taylor & Elias, 2012). Transformative learning practice presupposes a set of attitudes and a range of disciplined habits that can inform and shape the study design. In this way, one could say it becomes a research approach or praxis.

We are attempting to highlight how this approach has led and challenged us, as two transformative learning practitioners, in cross-cultural research over the last seven years in Tanzania, Africa. Our journey has traversed several domains of education, business and social action. It has transformed our lives, and influenced other individuals and organizations in the United States, as well as a community based organization (CBO), village groups, and the civic community of Bukoba, Tanzania.

Transformative Learning Theory and Praxis in Women's Global Connection

The practitioners are volunteers in the international organization, Women's Global Connection (WGC), whose mission is to promote the learning and leadership capacities of women locally and globally, particularly in the least advantaged regions and countries. WGC's overarching aim is to build a social network where women can strengthen their capacity to create a more just global community. Its primary activities in Tanzania have been twofold: on-site immersion trips during which volunteers implement capacity building workshops and activities; and on-going interactive communication via the organization's website, www.womensglobalconnection.org. Through these activities, cross-cultural practice and research are integral to the praxis of WGC.

Three underlying principles were identified as guides to cross-cultural endeavors very early in WGC's history: social empowerment, local ownership and long term sustainability. Social empowerment meant that the local participants in any capacity building activity would be able to replicate that activity with others. Local ownership demanded that WGC involve the participants in planning and implementing all capacity building activities. The principle of sustainability required conscious thought about how any local community initiative, no matter how worthwhile, could be significantly sustained without WGC's participation (Ettling, Buck & Caffer, 2010).
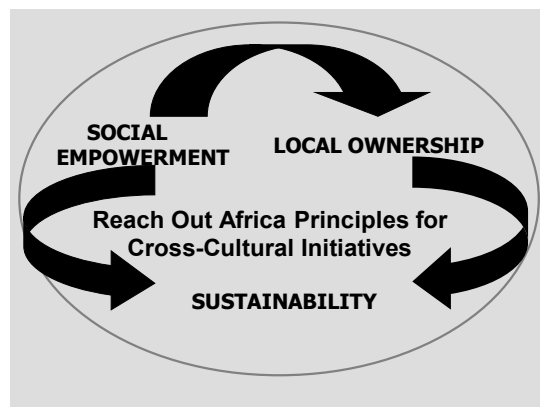
Figure 1. WGC Cross-Cultural Principles

Ettling, D. & Marquise, L. (in press).

We were privileged to be pioneers in the development of WGC. As transformative learning practitioners, we recognized the importance of critical reflection on our experience in trying to live these principles. However, it is in retrospect that we understand the power of transformative learning theory as a praxis foundation for our cross-cultural research. The concept of "praxis as research" noted by Patti Lather (1986, p. 258) is based on the notion of research openly committed to a more just world order. Instead of "value free knowledge, praxis oriented researchers seek emancipatory knowledge, which increases the awareness of the hidden contradictions in everyday understanding and directs attention to the possibilities of social transformation" (p. 259). Undoubtedly, one of the intentions of our ongoing research in WGC activities was to create the space for social transformation within ourselves and among those with whom we collaborated. An important aspect in Lather's description of research as praxis is reciprocity, a mutual negotiation of meaning and power. This presupposes an interactive approach to the research process that invites reflexivity and critique, not only among the researchers, but with the participants in the research. This follows naturally from the principles described above.

We have found that transformative learning theory informed our understanding of praxis. It offers a theoretical framework for our approach and provides touchstones for methodological strategies. In the concrete research experiences of creating instruments; conducting surveys, interviews and focus groups; and analyzing,

interpreting and reporting data, we are constantly challenged by the tenets and the ethical dilemmas of transformative learning practice.

Applying the Framework to Cross-cultural Participatory Research

Thus, transformative learning praxis has led and guided us as cross-cultural researchers over the past several years. Our use of this approach has evolved gradually and, as we have engaged in critical reflection on the projects and research in Tanzania, our understanding of its application has grown. We believe this is true of our partners and stakeholders as well, as together we have discovered additional ways to collaborate in the entire research process.

Conducting research in this context generally represents the evaluation or impact assessment phase of our collaboration with local partners. Here again, we hope to be grounded by the WGC process model mentioned above with a vision of social empowerment. As one reflection of transformative learning praxis, we have embraced the Community Based Participatory Research (CBPR) approach from the beginning (Horowitz et al., 2009; Viswanathan et al., 2004). CBPR engages multiple stakeholders in using their skills and strengths to work together on social problems and conduct research in ways that benefit all of the partners. This approach has enabled us to critically reflect with the CBO in Bukoba about how to use the knowledge from research and other initiatives to benefit the community. Still, we have encountered many disorienting dilemmas that contradicted our existing understanding of how to plan and design research, submit Institutional Review Board (IRB) applications, collect data, and analyze and interpret data. The significant shifts in thinking required for cross-cultural research and the effort to develop trusting relationships were some of the reasons.

For example, in designing one of the major ongoing data collection instruments, the Women's Economic Development Impact Survey (WEDIS) (Ettling, Buck & Caffer, 2010), we were challenged regarding the wording of questions, scales, ambiguous translation and other issues. Conducting a pilot project in the Bukoba village context enabled us to realize the importance of including bicycles and radios as forms of technology use that can impact the development or sustainability of a woman's micro-enterprise.

We profited greatly by receiving preliminary input and feedback from our partners, as well as working with a team from WGC that included people who were familiar with the culture. As we continue to critically reflect on the process of designing research within the Bukoba context, we know a growing edge will be the involvement of more of the emerging leaders in the villages at early stages of co-developing the design process.

Another challenge has been applying IRB requirements developed for Western-based projects to this cross-cultural context as well as influencing the IRB committees to reexamine policies for cross-cultural research. For example, recent projects have focused on the leadership development of younger women. In planning interviews with these women, we know the local culture recognizes them as adults at age 16 or 17, but an IRB typically specifies parental permission for anyone under 18. Accomplishing this could be challenging or deemed restrictive by the young women.

In implementing research, a primary challenge has been the need to strike a balance between culturally acceptable and feasible data collection methodologies and the need for scientific rigor (Horowitz et al., 2009). Issues such as interpretation of translated materials for women with low literacy, the validity of survey completion in groups rather than individually, and the need to honor and respect the social preference of group interaction over personal interviewing have all raised concerns for ourselves and our research partners. One way that we have attempted to address a cultural mismatch and revised our frames of reference has been to train leaders in the local Bukoba culture to join the research team and participate in the data collection.

In analysis and reporting of the findings of research, key issues are deciding what is meaningful to present and will best show the results. Here three strategies have been helpful: interaction with our partners who know what is important to them and their stakeholders; staying personally connected in the culture; and seeking input from others more experienced in the culture. Full participation of our partners in these aspects continues to evolve.

At every stage and phase of the development projects, including the research, critical reflection with our partners enabled us to explore alternative ways of thinking to ensure the research would be useful and effective. We reviewed methods and questioned our assumptions about the entire research process, often leading to revisions of our ideas or frames of reference for doing research in this context. This did not mean totally replacing our culturally embedded approaches of formality, tradition, and strict procedures, but becoming more flexible, open and culturally appropriate by using more informal and less strict approaches. The writing and discussion activities provided by Maher (2003) enhanced the depth of our reflection process. Experiential learning has served as a complement to

transformative learning praxis through the four phases of concrete experience in a research project, reflection, abstract conceptualization of a modified or new approach, and active experimentation (Kolb, 1984). Yet, these approaches still, predominantly, reflect our thinking as the researchers. To date, there is minimal research on the perceptions of the local participants regarding their involvement in these processes. One upcoming study (Sseruwagi, 2012) will offer some findings on how in-community stakeholders view their involvement in participatory development processes.

Ongoing relationship building has also been key in partnering with those in the culture. This has included really listening to their needs, dreams, concerns, and plans. Whether in informal conversations with leaders and members of the community as we rode in an old van with 15 people aboard, or in more formal discussions of plans and projects, these were opportunities to spend time together and learn the culture. An example, which really opened our eyes more to the lives and norms of the participants, was crossing a lake together in a boat to a national park. The women demonstrated much courage in the face of their fears about the water because they wanted to welcome us and cook for us in the relaxed setting of the park. We learned that most people in Bukoba do not learn to swim because much of the water is polluted. This later led to a discussion of ways in which they want to address the issue of clean water for their communities. Our partners' strong motivation to improve their lives, the lives of their families, and their communities; their eagerness to take responsibility for that and to learn; their openness even when they are not always sure initially how to achieve what they want to achieve, have all been critical in the evolving collaborative research process.

The cross-cultural competency principles of the American Evaluation Association (2011) have led to additional reflection, discussion, and implementation of ways to enhance our cross cultural competencies, ethical practices, and skills for transformative learning praxis in this context. These principles have further raised our awareness of ways in which our approaches to research reflect our own culture's values, norms, and ways of knowing. As stated by the AEA (p. 3), "Cultural competence is not a state at which one arrives; rather it is a process of learning, unlearning, and relearning. It is a sensibility cultivated throughout a lifetime."

Conclusion

Transformative learning praxis as a framework has provided these cross-cultural researchers the opportunity to learn much. While this is the case, we must be vigilant and aware that our learning in that cultural context will continue to evolve. We hope that greater cultural competence in the Bukoba, Tanzania setting will have some transferability to other cultures we enter, but that cannot be assumed. With future grass roots partners in less developed countries, regardless of how similar or different the specific competencies needed are, the relationships and understanding must be developed. For this reason alone, competencies needed upon entering a new context will be somewhat different than those needed after 10 years of positive partnering with the CBO in Tanzania. Here, trust has been built through listening, observing, asking, and being willing to experience, and is continually being built with each electronic or personal encounter, each project and each immersion group.

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Using Holistic Epistemology to Facilitate Transformative Learning

European-American Collaborative Challenging Whiteness[1]
A Group of Scholars/Practitioners Without Institutional Affiliation, USA

Abstract

This paper describes the theoretical rationale that guides our practice in learning and transformation. Our workshop is designed to give participants a living experience of how holistic epistemology supports and catalyzes transformative learning.

Keywords

Transformative Learning, Perspective Transformation, Holistic Epistemology, Presentational Knowing

Our workshop gives participants a living experience of how holistic epistemology supports and catalyzes transformative learning. In this paper we describe the theoretical rationale that guides us in the design of our workshop as well as in our practice as facilitators of adult learning and transformation.

We are a group of six white adult educators who have been working together since 1998. Our group, the European-American Collaborative Challenging Whiteness, seeks to make the world a more just and loving place by examining how our own racism and whiteness blocks us from being "more inclusive, differentiating, permeable (open to other viewpoints), critically reflective of assumptions, emotionally capable of change, and integrative of experience" (Mezirow, 2000, p. 19). In our workshop, we fashion learning activities intended to provide participants with a direct experience of presentational knowing, which is an integral element in the holistic epistemology that we believe supports and catalyzes transformative learning. We focus on presentational knowing because it is a way of knowing that can be most effective in addressing stubborn/reluctant and unconscious habits of being, and is an approach that is often under-appreciated in academia.

Our understanding of presentational knowing and holistic epistemology is drawn from the specific context of our work addressing racism and cultural hegemony. Thinking about changing white people's understanding of how they benefit from race privilege, we observe, "Transforming consciousness in people who have long taken-for-granted that their own culture, values, and standards are superior and/or universally applicable, or that a universal culture is possible and desirable, is a daunting educational challenge" (European-American Collaborative for Challenging Whiteness, 2002). Our work together over the past 14 years has taught us that using holistic epistemology is especially helpful when habits of mind cling tenaciously to the status quo and perspective transformation is most difficult.

Although what we share is rooted in the context of our group's practices, we believe that using extended epistemology is equally relevant to any meaning perspective that calls for expansion or transformation of consciousness in which deep cultural patterns are operating. The purpose of this paper is to use the lens of transformative learning theory to understand how holistic epistemology and presentational knowing help facilitate transformation.

What is Transformative Learning?

We adopt Jack Mezirow's fundamental conceptualization regarding the content of transformative learning. Mezirow (2000) refers to a constellation of assumed attitudes and cultural messages as a meaning perspective or habit of mind. He believes that habits of mind become reified and that "transformation refers to a movement through time of reformulating reified structures of meaning by reconstructing dominant narratives" (p. 19). He identifies three basic factors that shape meaning perspectives — psychological, epistemic, and sociolinguistic (1991, p. 43).

We use our group's experience to illustrate transformation within these three types of meaning perspectives: Within the realm of the psychological, all members of our group have strong self-identity needs to perceive themselves as being the sort of white person who is effective in interrupting white privilege and tenacious in acting for racial justice. Our group's inquiry has helped us become more aware of how our meaning perspectives regarding personal identity can become distorted by deeply-felt need to see ourselves and to be seen by others as a

"good" white person. We have also become more aware of how our experience as white people is linked to our epistemic meaning perspectives, including the tendency to privilege analysis and action, which is the focus of this workshop. Within the realm of sociolinguistic perspectives, we are able to notice race privilege and structural racism in ways that used to be invisible. None of these transformations are explained soley by rational analysis and critical reflection, although those processes are part of the extended, holistic epistemology that has facilitated our growth.

Although we adopt Mezirow's conceptualization regarding the content of transformative learning, we think that his ideas about process are too limiting. Mezirow proposes phases of perspective transformation that begin with a disorienting dilemma. The dilemma triggers a period of self-examination, followed by a critical assessment of the assumptions that compose one's meaning perspectives. After rationally exploring various new understandings and courses of action, one integrates into one's life new roles and relationships that are dictated by a newly embraced and expanded meaning perspective.

Mezirow has been criticized that his perceptions about the process of transformative learning are limited (Clark & Wilson, 1991; Taylor, 1998; Yorks & Kasl, 2002). We agree with critics who say the process he describes is narrowly rational and analytic, too linear, and unable to account credibly for the ways in which emotions influence critical self-examination. Further, Mezirow does not sufficiently acknowledge that our ability to assess the constellation of our individual and collective attitudes and beliefs may be inadequate.

We believe that failure to account for and integrate emotional knowing into critical reflection can lead to faulty analysis, more limiting beliefs, and unsustainable behavior change. To counter these limitations, we advocate for John Heron's (1992) conceptualization of an extended epistemology. We increase our ability to assess our individual and collective attitudes and beliefs by using Heron's extended epistemology because it is holistic and inclusive of emotional content. One important consequence of rooting changed beliefs in holistic epistemology is that resulting changes in behavior are much more likely to be sustained. The new meaning perspectives are more authentic, congruent, and sustainable because the change process engages the whole person more fully with multiple ways of knowing.

Theoretical Framework for Holistic Epistemology

The holistic epistemology that guides our practice derives from John Heron's theory of personhood, which describes how human knowing integrates felt experience, emotions, intuition, imagination, reflective analysis, and action. Heron (1992) describes four separate ways of knowing, each with its own canon of validity, but also integrated into an interrelated system. *Experiential knowing* is felt resonance with others and with the natural world. It is pre-linguistic and the location of emotional response. It is also the foundation for all knowing, upon which the other three ways of knowing must be grounded. *Presentational knowing* is the apprehension of pattern in felt experience; it is the site of intuition and imagination. This way of knowing is accessed through expressive forms such as visual arts, drama, music, dance, poetry, metaphor or story. *Propositional knowing* is the formulation of concepts. It is the site of analytic thinking, which is valorized in academic culture as well as in Mezirow's perceptions about critical reflection as the engine fueling transformation. At the apex of the pyramid is *practical knowing* or "knowing how," that is, the site of taking action based on what we think we know. Practical knowing is perceived by Heron to be the appropriate culmination of the quest for meaningful learning. He refers to its pinnacle position in the extended epistemology as the "primacy of the practical." Heron summarizes, "these kinds of knowing are a systemic whole, a pyramid of upward support in which experiential knowing at the base upholds presentational knowing, which supports propositional or conceptual knowing, which upholds practical knowing" (Heron, 1996, p. 52).

It is common in the dominant culture to try to skip directly from an experience to analyzing it conceptually, that is, to skip directly from experiential knowing to propositional knowing. What Heron shows us is that when we try to analyze an experience before we explore it fully through the intuitive and imaginal modes of presentational knowing, we often distort the experience by ignoring or minimizing the emotions associated with it. When this happens, our ability to take effective and sustainable action is compromised.

Practical

Propositional

Presentational
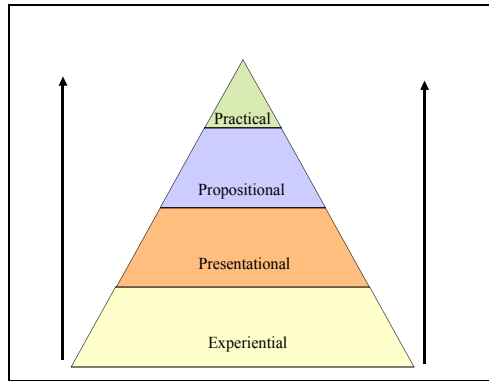
Experiential

John Heron's Extended Epistemology

Elizabeth Kasl and Lyle Yorks (2012) explain how presentational knowledge bridges between experiential and propositional knowledge:

> Presentational knowing is a powerful facilitator of holism because it can bring experiential knowing into conscious awareness, thus making it more accessible as a base for new ideas and actions…. When we linger in the imaginal space of presentational knowing, we stay open to multiple interpretations of our experience and protected from premature conceptualization that constrains and restricts meaning…. By its nature, presentational knowing slows our pace in making meaning, giving us time to resonate fully with our phenomenological world. (p. 510)

We acknowledge that engaging one another using Heron's holistic epistemology may be both unfamiliar and culturally suspect. Western culture in general and academic culture in particular hinder our capacity to access experiential and presentational knowledge in ourselves and to facilitate processes that allow others to access such knowledge. Our epistemological habits valorize analytic thinking and leaping to action while denigrating the systematic exploration of feelings, emotions, felt experience, and knowledge apprehended through intuition and imagination. Therefore it is important to remember that while holistic epistemology is an integral and necessary part of transformative learning, it can be difficult to enact because of the impeding power of cultural norms.

An Example of Presentational Knowing in Action

Here is one example of how presentational knowing opened participants' minds to the unconscious or unacknowledged aspects of their experiences and led to practical action that might otherwise not have occurred.

As part of their cooperative inquiry, a small group of white people attended a social justice rally to free Mumia Abu-Jamal. The speakers at the rally in downtown San Francisco railed against many kinds of injustice and privilege. It was not a moment of feeling hopeful about what it means to be white. The group members reported feeling overwhelmed, traumatized, and shutdown and left the rally with lingering feelings of guilt and shame about racism in the U.S. Immediately following the rally the group met for a session of presentational knowing during which "each group member drew a picture to present her or his experience of our collective action" (Paxton, 2003, p. 268). The group discovered that the drawing activity allowed participants to reach new conceptual understanding and "make greater meaning of our experience in ways that could only have been accessed via presentational knowing" (Paxton, 2003, p. 268).

One participant describes her experience:

An attempt to make meaning through art was very spontaneously insightful for me…. right away, an eye, a new eye (a new "I" my co-inquirers suggested!) came up. I drew and streams of words came, like a poem: New Eyes: not color blind. New identity. New ways of looking at things. Not irony blind. Not power blind. Not self-deception blind. Not immune anymore. A little bleary but wide open, teary, dark circles from remaining open. Shocked sometimes, baffled often, unsure of hope. Angry. Green—for newness, alive, jealousy? Jealous of blindness—it seemed

easier to be blind. (Then I noticed the background for this eye I drew was all White, and I grabbed a random pastel, and shaded in skin around the eye, yellow and brown, and wrote why I did this.) White is the background, isn't it? I thought how Persons of Color never get a "color-free" day in a racist society. They are also not blind, and may be bleary-eyed from the strain of constant racism. And I thought how I had the privilege of being blind to that, and not having to think about it all the time could be something to be jealous of—wouldn't it be nice to not have to think about who you are, where you are, is it safe, who is around, what do I know about how they may be imaging who I am? (Paxton, 2003, p. 268).

Presentational Art by Faye, October 16, 1999

The unconscious comes into consciousness through metaphor and symbols. Another inquirer in the group commented, "Just doing a more imaginal pedagogic process…tempered our hopelessness with less surrender [and] opened up the mysterious vastness of what we deal with (and can therefore take on activism-wise) right in our own lives" (Paxton, 2003, p. 269). Instead of being shutdown by overwhelm and guilt, members of the group reported having fresh energy to continue inquiring into what it means to be white.

Description of Workshop[2]

In this workshop we focus on the relationship between emotion and transformative learning by producing a living experience of Heron's extended epistemology. According to Heron, emotions are embedded in our experiential knowing. They are pre-linguistic and not easily described. In fact, they may also be difficult to perceive with any felt sense of clarity. Presentational knowing helps us heighten our awareness of our emotions and then to perceive their significance. Situated between experiential knowing (the site of emotions) and propositional knowing (the site of analysis and reflection), presentational knowing provides an epistemological bridge that connects emotions to thought and action. It is our experience in academia that there is a bias toward propositional and practical knowing, and education practitioners are often inexperienced and even uncomfortable with helping learners use presentational ways of knowing.

Presentational knowing can play a critical role in transformation at multiple levels of systems — within the individual, between individuals, and in communities and organizations (Kasl & Yorks, 2012). We will provide references that describe how educators can facilitate its use between individuals as well as in larger systems.

Our workshop plan:

10 minutes.	Welcome, "get to know your neighbor" activities in order to establish a modest sense of community and comfort.
15 minutes.	Overview of Heron's holistic epistemology, with special attention to the function of presentational knowing in surfacing and clarifying the emotional content of human knowing.
10 minutes.	Explanation of workshop process. We ask participants to choose one modality for presentational knowing. Explain that the emphasis is on how the modality helps you gain insight, not on quality

of artwork. Move into modality groups. Choices might include: clay sculpting, drawing, music and sound, poetry and metaphor, movement.

20 minutes.   Guided visualization and presentational knowing. We will use guided visualization to help participants re-live a critical incident with strong emotional content. The purpose is to re-engage with the quality of the emotions. After visualization, participants use their chosen modality to express the emotional quality from their remembered critical incident.

25 minutes.   Discussion in small groups. Re-form groups in order to mix modalities. Facilitators will help discussion groups analyze the way in which presentational knowing helps them clarify or become aware of the impact of emotion on their thinking and action.

10 minutes.   Wrap up reflection. Information on where to find further information.

Note

1. The European-American Collaborative Challenging Whiteness fosters research and learning about the subject of racism and white privilege. Using collective authorship under the name of the Collaborative reflects our understanding of the way in which knowledge is constructed. Members came together originally through a cultural consciousness project at the California Institute of Integral Studies in San Francisco; members are: Carole Barlas, Elizabeth Kasl, Alec MacLeod, Doug Paxton, Penny Rosenwasser and Linda Sartor. Inquiries about the Collaborative's work can be addressed to any member via email: collaborative@eccw.org. Find further information at our website: http://www.iconoclastic.net/eccw/

2. The workshop plan described in this paper is for the 90 minute time span requested and originally planned. The final workshop will be adjusted to fit into the 60 minutes allocated by the conference planning team.

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Transformative Learning in the Higher Education Extracurriculum

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Abstract

This session will explore how transformative learning theory can be used to support the developmental needs of graduate students. We will share the story of how a group of graduate students increased their commitment, learning and engagement through the creation of an extracurricular learning community, referred to as the Personal Leadership Initiative (PLI), which used peer coaching and collaborative inquiry as primary learning methodologies. This session will provide an opportunity to discuss extracurricular activities in graduate studies through a sharing of best practices and a facilitated discussion on how students and educators can co-create transformative learning experiences in higher education.

Keywords

Higher education; extracurriculum; peer coaching; collaborative inquiry; adult development; learning community; adaptive learning

Definition of Problem

As students flock to graduate schools in record numbers and as technology and globalization increase demands on workers, the field of higher education must grow to meet the demands of the market by offering a comprehensive educational and developmental experience for students. Lovitts (2005) reports that 40% to 50% of doctoral students do not complete their degrees. Raelin (2007) notes that teaching methods used in most higher education classrooms do not take into account the needs of adult learners and do not adequately prepare them to manage the complexity and ambiguity of the global economy.

Researchers have previously acknowledged the various developmental gains that accompany time spent in college while noting that the catalyst for this development is often found outside of the regular academic curriculum (Brown-Liburd & Porco, 2011; Kuh, 1995; Terenzini, Pascarella, & Blimling, 1999). The higher education domain has long been considered an ideal environment for transformative learning; Mezirow's (2000) original work was done with women returning to college.

This paper will explore the ways in which a group of graduate students endeavored to increase their commitment to and engagement in graduate studies by creating an extracurricular learning community, referred to as the Personal Leadership Initiative (PLI). The paper will conclude with recommendations based on the lessons learned from the PLI.

PLI Experience

The PLI was a student-driven initiative developed with the intention of creating a powerful and applicable method for building adaptive capacity. All four authors were involved in creating, implementing and ultimately participating in the PLI. The PLI program was sponsored by the Organization Leadership Association, a student association connected with the Adult Learning and Leadership Program at Teachers College (TC). The PLI began with two half-day workshops, which provided participants with basic coaching skills and took them through a change-oriented self-reflective exercise known as the Immunity to Change Process, (Kegan and Lahey, 2001, 2009). Eighteen graduate students participated in the PLI in various roles over nearly two years. Two dominant methodologies informed the PLI: collaborative inquiry and peer coaching. These were specifically chosen to engage both developmental and transformative adult learning processes.

Participants were divided into two small discussion groups that met weekly and were also organized into coaching relationships that met outside of class. The peer-coaching cycle was designed to create unique coach-

coachee relationships in which no participant would be coaching and being coached by the same person. This is different from many peer coaching programs (Bowman & McCormick, 2000; Parker, Hall, and Kram, 2008) in which students are paired up and coach one another. This division allowed two coaching sub-groups to form that meet separately from their coachees. These sub-groups acted as small debrief groups in which coaches could discuss their coaching challenges apart from their coachees. It also allowed a facilitator to join the group and provide feedback and support. These sub-groups, or "coaching corners", met during several of the small group and collaborative inquiry meetings. In addition to the weekly meetings and outside coaching interactions, participants were provided with short assignments, which included self-reflective questions, journaling and a formal feedback process with their coach.

Over time, the PLI evolved from a facilitator led training program into a shared learning community that incorporated a collaborative inquiry (CI) process alongside the peer coaching process. CI can be defined as "a process consisting of repeated cycles of reflection and action through which a group of peers strives to answer a question of importance to them" (Bray, Lee, Smith, & Yorks, 2000, p. 6) and is often used to help participants develop their personal and professional capacities (Yorks & Kasl, 2002). The CI discussions focused primarily on exploring how peer coaching and reflective dialogue could facilitate transformative learning opportunities for graduate students, while the coaching process was shaped by each participant's individual needs and goals.

Grounding in Transformative Learning

According to Cranton (2006), transformative learning is a developmental process in which meaning exists within an individual rather than as an external truth and is based on the assumption that learners can revise their personal meaning making through interaction and dialogue with others. While these conditions may theoretically be attainable in a higher education classroom, the authors found that in order to create conditions for transformative learning it was necessary to look outside of the traditional higher education curriculum. The context of the PLI offered an opportunity for participants to apply the theoretical concepts learned in class to significant challenges they were facing in their lives. The combination of journal reflection, "coaching corner", CI sessions and an intentional action plan developed in the peer coaching pairs allowed participants to lead and coach more effectively as well as make progress on their personal development goals.

Prior research on transformative learning has suggested that three general conditions are necessary for transformative change to occur including critical reflection, critical discourse and dialogue with others, and the creation of a supportive context (Mezirow, 2000; Snyder, 2008; Taylor, 1997, 2007). In the following sections we consider in more detail how each of these conditions were incorporated into the PLI program.

Critical Reflection

In transformative learning, critical reflection refers to the process of questioning the assumptions and beliefs that gave rise to one's past actions and thought processes (Taylor, 1998). "Reflection . . . is the process of turning our attention to the justification for what we know, feel, believe and act upon" (Mezirow, 1994, p. 46); with respect to transformative learning, critical reflection is a purposeful process, which one enters into with conscious awareness and intention (Mezirow, 1995). Each PLI role and relationship provided potential dimensions for self-reflection. The role of coachee provided opportunity for critical reflection on a personal development challenge. To be an effective coach, participants had to be mindful and self-reflective of supporting the change efforts of the coachee, without projecting their feelings or experiences onto the coachee. "Coaching corners" created the opportunity to critically reflect on the role of coach and its challenges. CI sessions also provided the opportunity not only to reflect on the inquiry question, but also to reflect on one's role in the group and the impact of one's actions on group processes.

In particular, the Immunity to Change Process was instrumental in identifying and framing the individual development goal for each participant. This critical self-reflection helped participants gain awareness of unconsciously held assumptions that inhibited them from achieving their development goal. Once each participant developed awareness of these assumptions, he or she then reflected on the validity of these beliefs while being supported by a peer coach.

Critical Discourse and Dialogue

Reflective discourse, or the critical use of dialogue in order to reach common understanding and test one's assumptions, requires both emotional maturity and logical analysis (Mezirow, 2000). Mezirow (2000) outlines the ideal conditions for discourse, which include: openness to other points of view, ability to assess arguments, awareness of context and one's own assumptions, equal opportunity for participation and willingness to seek new understanding through dialogue. As trust developed in the PLI group, these conditions became more attainable. The CI sessions created a space in which participants could discuss the learning process as well as what transformations were being observed, both individually and within the group.

The multiple relationships and opportunities for critical discourse and dialogue in the PLI, combined with the critical reflection process and learning exercises, may have created a synergy that increased the impact of any one component. The program challenged participants to revise not only the assumptions that may have been preventing them from achieving their development goal, but it also allowed them to question their assumptions about coaching others through a change process. Holding different roles created a feedback loop where participants' experiences as coachee impacted their learning and development as peer coach.

Supportive Context

Without a supportive context, the process of transformative learning can overwhelm the committed learner, resulting in a stalled or derailed change process (Kegan & Lahey, 2009; Heifetz, 1994). A holding environment or supportive context supports learners while they work through the transformative processes and achieve a new equilibrium (Kahn, 2001). A holding environment can be created within interpersonal relationships or groups and enables learners to manage potentially stressful situations. Peer coaching was a central component of the PLI that created a challenging yet supportive holding environment.

Peer coaching is a process in which a coach uses active listening, inquiry, reality testing and mirroring to help a coachee expand his or her awareness and understanding of self and situation (Parker, Hall, & Kram, 2008). A peer coach provides opportunities to question long-standing assumptions and try out new ways of behaving. A peer coach also provides feedback and supports critical reflection, which can undermine limiting attitudes and beliefs (Ulrich, 2008). This creates the conditions for a supportive learning environment, in which participants feel comfortable taking risks and opening themselves to new thoughts, behaviors and actions.

In a peer coaching relationship, both parties have committed to a process of deep personal change through self-disclosure and self-reflection. The trust that often forms between co-learners who have co-committed to a process of self discovery and change allows for a level of mutual trust and understanding that distinguishes this helping relationship from others (Eisen, 2001). While trust and understanding may develop in hierarchical helping relationships, there is a degree of dependence and an acquiescence of responsibility for one's own learning process that does not seem to occur to the same extent within an adult peer coaching relationship (Eisen, 2001).

Findings and Discussion

Data were gathered from interviews with PLI participants six months after the program commenced as well as six months following its conclusion. Interviews assessed how participants perceived the impact of the PLI and which elements were perceived as important for creating developmentally supportive conditions.

Overall Impressions of the PLI

Results from the qualitative interviews showed that participants were motivated to participate in the PLI for various reasons including improving their coaching skills and personal growth and development. Individual development goals included time management, procrastination, setting personal boundaries and managing emotions in the service of improving personal and professional relationships. Overall, participants reported the PLI to be valuable and supportive of their learning goals. All interviewees reported at or above a 7 out of 10 (10 being the best possible rate of the experience) rating for the program while 70% of interviewees rated the program an 8 or 9 out of 10.

Perceived Impacts of the PLI

Surfacing Assumptions and ITC Process. Several participants indicated that one of the most significant impacts of the PLI was surfacing taken-for-granted assumptions that were holding them back from achieving their goals. This increased awareness became the foundation for understanding their challenge in a new way, thus providing a path for moving forward. Participants noted that in the process of surfacing assumptions, they were able to see the interconnectedness between their particular learning challenge and other challenges they faced. This

allowed participants to identify their implicit attitudes and beliefs allowing for more efficient and effective behaviors and decisions making processes.

Leadership. A number of participants reported that the learning, growth and development gained during the course of the PLI allowed them to take up new leadership roles in the context of work as well as in their personal lives. The perspectives gained from the PLI manifested in behaviors and thought processes that allowed participants to set clearer boundaries and to communicate their needs and intentions in a more direct and productive manner.

Coaching Competencies. Participants also shared that the PLI gave them a real-world opportunity to reevaluate the assumptions they had about coaching. They reported that when the PLI started they had certain ideas and expectations about what coaching was or how it should be done. Through their experience in the PLI they came to shift these assumptions and develop a new model of coaching. This shift occurred in part because each participant was given the opportunity to be both coach and coachee during the PLI. This moved participants beyond the one-sided experience of coaching and gave them a firsthand experience of the needs and challenges coachees face as well as exposure to other styles and methods of coaching.

Personal Growth and Development. All participants (100%) described positive changes in three distinct yet interconnected domains, affective, behavioral, and cognitive. All participants (100%) reported an improved academic and professional self-concept following their participation in the PLI. Positive changes in one's academic self concept included feeling connected to the university, feeling a sense of purpose in one's studies and greater clarity around the writing process and conducting research. Positive changes in one's professional self-concept included feeling like part of the field and the ability to apply academic concepts to professional work. All participants (100%) reported improved social skills or social interactions including improving listening and questioning skills, feeling comfortable expressing emotion and the ability to tolerate conflict.

Elements of PLI that Supported Transformative Learning

Participants reported that the multiple elements of the PLI supported them through a transformative learning process. These findings are grouped according to the conditions that tend to enable transformative learning, including critical reflection, dialogue and a supportive context.

Critical self-reflection and ITC process. Gaining awareness of mental patterns allowed participants to consciously choose actions and behaviors aligned with their personal goals and an emerging sense of self. This process enabled participants to see the interconnectedness of their challenge with other aspects of their lives. Instead of seeing their challenge as something they needed to "fix" or "work-on", they began to see a larger system operating outside of their awareness, preventing them from making these desired changes.

Dialogue and peer coaching. The process of engaging in dialogue with a peer coach seemed to be of particular significance to PLI participants. They reported a significant perspective shift in their own development due to reflections offered by their coach and other PLI participants. Coach feedback and reflective exercises built into the PLI enabled participants to shift their focus inward allowing them to see some of the driving forces behind their behavior and deeply question the underlying premises upon which their values were based.

Supportive context and the small group. The multiple dimensions of support offered by the PLI were important in terms of creating a truly supportive holding environment (Kahn, 2001). This allowed participants to make themselves vulnerable, fully engage in the process and take the risks necessary for transformative change and adaptive learning. The notion of vulnerability and risk taking are key factors in the transformative learning process, which is only possible if the learner feels a real sense of trust, support and acceptance (Kahn, 2001). Without a legitimate holding environment, transformative learning can be an exceptionally difficult and painful process (Kegan & Lahey, 2009).

According to participants, three of the critical PLI components that created a holding environment were: 1) the accepting non-judgmental space created by PLI facilitators and participants, 2) providing equal time and space for student contributions and 3) participants' commitment and interpersonal connection to the experience. Participants also spoke to the importance of the institutional and organizational support of the PLI. The overarching pedagogy, beliefs and attitudes of the governing system, in this case an academic institution, were critical in supporting them through a process of transformative learning.

Recommendations

Creating an extracurricular learning community that incorporates multiple dimensions of learning can provide a supportive, yet challenging environment for transformative learning to occur within the graduate student population. The authors feel the two methodologies used in the PLI, peer-coaching and collaborative inquiry, could be used to create these learning communities for graduate students in other fields and at other universities.

Based on the findings from the PLI, the authors recommend implementing transformative learning programs within academic institutions, which utilize a peer coaching cycle to support learning on multiple levels and enable participants to fully experience each side of the coaching relationship in a simultaneous and iterative fashion. In the PLI this learning design resulted in the formation of rich and complex relationships as well as significant co-learning for both the coach and coachee. As Saltiel, Sgroi, and Brockett (1998) attest, "peer learning entails much more than simply learning from each other . . . it means learning with each other" (p.1). The coaching relationships also increased commitment through involvement as participants were responsible for their own learning and development, in addition to the learning and development of their peers.

Collaborative inquiry is also recommended as a methodology to support the development of graduate students. According to Yorks and Marsick (2000), the principles of CI, namely participation, holistic learning and democracy, make this methodology "more likely . . . to foster transformative learning". Specifically, the opportunity for leadership development, critical reflection, dialogue, feedback and observation of and experimentation with group processes can create conditions for positive developmental outcomes.

The overall recommendation for fostering transformative learning at the graduate student level is to develop a multiple component learning community that can provide a supportive, yet challenging environment. Based on findings from the PLI, the authors recommend creating a non-judgmental environment; time and space for equal participation; a transition to a leaderless group of shared responsibility; and space for critical reflection and dialogue to challenge individual assumptions.

Directions for Future Research

Future research should focus on better understanding the diverse needs of graduate students and how the extracurriculum and other initiatives may help address those needs. Areas of research to consider include case studies of extracurricular graduate programs at other universities to examine the external validity of the PLI program, including its application and use in public universities, and programs outside of adult learning and development. In addition, future research should examine the impact of extracurricular graduate activities on career advancement, improved matriculation rates and increased satisfaction with the overall graduate school experience.

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Taking a Communication Perspective: Transforming Learning in Systems

Beth Yoshida Fisher and Ilene Wasserman

Overview

This proposal is for an interactive 90-minute workshop integrating Transformative Learning Theory and group process. The presenters will highlight how the tools and concepts used in three cases in the domains of healthcare, education and community, fostered environments ripe for transformative learning through praxis. The participants will apply the tools and concepts to their own cases followed by a debrief that will explicitly link practice to theory.

Theoretical Foundation

Jack Mezirow's work proposed a fresh look at adult learning. His transformation theory, influenced by Habermas' work on instrumental and communicational learning, describes a cognitive process by which people modify or transform viewpoints they may have taken for granted. The trigger that challenges one's taken-for-granted assumptions has been described as a *disorienting dilemma* (Mezirow, 2000), or as a discrepancy between the learner's expectations and his or her experience followed by disorientation and discomfort (Brookfield, 1987). Mezirow suggests that reflection on a disorienting dilemma provides opportunity to challenge our habits of mind and action, by not only challenging *what* we know but *how* we know what we know, stimulating novel ways of being, thinking and engaging (2000). Transformation of a person's frames of reference leads to developing more comprehensive, differentiated, permeable and integrated perspectives in relation to their lived experience (Mezirow, 1991).

The Coordinated Management of Meaning (CMM) is a practical theory that provides tools and frameworks that guide facilitation, interpretation and reflection on meaning making (Creede, Fisher-Yoshida & Gallegos, 2012). CMM takes a communication perspective and is built on three core principles of *coordination* in what we are making together; *coherence* in understanding our social world, relationships and communication; and *mystery* in that the world is a complex place with an abundance of ambiguity (Pearce, 2007). According to CMM, our social worlds are built in relationship of what we are making together and the quality of our interactions influences the quality of the worlds within which we live.

Wasserman's work with groups is an example of CMM and transformative learning. People experiencing dissonance of cultural and positional differences, transform their perspectives with other group members through critical reflection and sense making of how they construed each other supported by CMM tools and concepts (2004).

Workshop Design

This workshop is divided into three parts:

Part I: The presenters will provide a brief introduction of CMM and how it relates to transformative learning theory. They will share case examples of how they used CMM as a tool to support transformative learning in three different domains: a health care system in the U.S., an educational system in California and a community in Israel. Each presenter will introduce a different CMM tool or concept and identify how taking a communication perspective promoted transformative learning through facilitating processes, providing alternative means of interpretation and in stimulating reflection as part of the cycle of praxis.

In Part II, we invite participants to gather in groups and share situations of systems they want to explore applying CMM tools to enable taking a communication perspective to understand, act into, and reflect upon their work in various domains. The groups will be formed based on the domain and systems level interests of the participants.

Part III, will consist of cross group sharing of insights and a discussion on how taking a communication perspective transforms understandings of our social worlds, how they are made and our role in that process. The purpose of gleaning insights is to increase our agency in developing more self-awareness, understanding of others and fostering better environments and social worlds within which we live.

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Insights into the Lived Experiences of Graduates of an Accelerated Undergraduate Degree Completion Program Viewed through the Lens of Transformative Learning

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Abstract

This paper discusses the findings of a research study completed in 2009 as part of a doctoral dissertation completed by the author. The purpose of the study was to understand the lived experiences of graduates of an accelerated undergraduate degree-completion program. This was a qualitative study using a phenomenological research methodology and the theoretical framework of transformative learning. The findings revealed the emergence of four themes: motivation, value of the collaborative process, pedagogy, and self-concept. The findings indicated that many participants experienced transformation as a result of their educational experiences.

Introduction

Transformative learning may seem like a simple, straightforward concept until you try to define it. In 2008, I was flying home to Chicago after visiting family in Florida. During that period, I was in my adult education doctoral program and reading Patricia Cranton's book, *Understanding and Promoting Transformative Learning* (2006) on the flight home. The gentleman in the seat next to me saw what I was reading and asked me what transformative learning was. At the risk of sounding indelicate, I "choked" on my response. I stumbled and stammered and tried my best to define it as best as I could in as few words as possible. As it turned out, he was a learned man, a retired college professor, and we had an interesting and thought-provoking discussion related to adult education during the rest of the flight home.

Four years later, I was at a family holiday dinner and, for some reason, we started talking about my doctoral dissertation. I used the term "transformative learning" and my nephew asked me what "transformative learning" meant. I would like to think I answered him with more aplomb this time, but I would be a liar if I said I did not feel at least some of that same anxiety I felt years ago. Even though the various authors of transformative learning theory articulated it well in print, it was still difficult for me to wrap my mind around it. What I realized was that I understood the meaning in my *heart* more so than in my *head*.

When I started studying *transformative learning*, I found that it resonated with me. My own transformative journey started approximately 20 years ago. Back in the day, I remember being told that women only went to college to become a teacher or a nurse. Otherwise, it was considered a waste of time and money. At that time, I didn't want to be a teacher or a nurse. Plus, I believed that college was for the very smart or very rich and, frankly, I did not think I was either. As time went on, when I was in my mid-30's and working at a mid-level but low paying job, I had about two years of dangling college credits from a local community college. I had this nagging need to take care of unfinished business plus I wanted to increase my financial status. In the mid 1980's I enrolled at the University of Phoenix in their accelerated Bachelor of Science in Business Administration program, and, after about a year and a half of hard work and overcoming challenges of being a working adult student, wife, and mother, I graduated with my bachelor's degree.

Because of my experiences, the view I had of myself and my life world had changed significantly. My thirst for knowledge grew. I went on to complete two master's degrees and my doctoral studies. As a woman who at one time felt that I wasn't "good enough" for an education, I realized the empowerment of education. While education did not guarantee anything, I understood that it gave me options that I did not have before. I also came to believe that education was a journey and not a destination.

Many years later, as I embarked upon my doctoral studies, and after much critical reflection, I felt called to research adult students like me who completed their bachelor's degree in an accelerated program. I decided to conduct my study viewed through the lens of transformative learning. There had been few studies related to the

transformative effects related to graduates of an accelerated program so I felt there was a need to conduct such research.

Definition
Jack Mezirow (2000) defined transformative learning as the following:

…the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mindsets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action (pp. 7-8).

Elizabeth Kasl and Dean Elias (2000) referred to the expansion of consciousness, as noted below:

Transformation of the content of consciousness is facilitated when two processes are engaged interactively: the process of critically analyzing underlying premises and the process of appreciatively accessing and receiving the symbolic contents of the unconscious. Transformation of the structure of consciousness is facilitated when a learner is confronted with a complex cultural environment because effective engagement with that environment requires a change in the learner's relationship to his or her or the group's identity (p. 233).

Patricia Cranton (2006) defined transformative learning as "the process by which people examine problematic frames of reference to make them more inclusive, discriminating, open, reflective, and emotionally able to change" (p. 36).

The above definitions discuss it from different angles, however, to me, the common theme is the idea of *change*. How did the person change how he viewed himself in his life world?

Data Collection and Methodology
This was a qualitative research study using the methodology of phenomenology. There were two sources of data collection – ten semi-structured interviews and four end-of-program reflection papers. The fact that the interviews were semi-structured helped make it a more organic process allowing the individual stories to emerge. The reflection papers served to give additional insight into the participants' experiences with their program.

Findings and Discussion
As a result of the analysis, four themes emerged: *motivation, the value of the collaborative process, pedagogy* and *self-concept.*

Motivation
The first theme, *motivation* was a recurring theme in many of the interviews. The motivating factors that brought someone into the program might not be what *kept* him or her motivated throughout the program. In other words, the participant may have experienced a *shift in motivation.* It may be initially about getting the extrinsic reward, such as job security or an increase in pay. However, the reward can shift to a more intrinsic reward such as enjoyment in learning. Peggy experienced such a shift in motivation. When she first entered her program, it was about the extrinsic reward but, as time went on, the reward for her become more intrinsic. She realized that she looked forward to her class sessions. Her classes were enjoyable and stimulating. She wanted to continue and eventually pursue a master's degree. She wanted to go on to school for the sake of learning and not just to get ahead in her job.

Value of the Collaborative Process
The second theme identified was the *value of the collaborative process,* Often accelerated programs are in a cohort model where the same group of students progress through the program together. According to Kasworm (2003), students are often attracted to the quasi-family relationship in such programs. There are group activities, projects, assignments and presentations as part of their studies. Sometimes students were apprehensive of the group process at first, but appreciated it as time went by. Ross realized that not everyone thought like him and that you cannot always convince others to think like you. He realized the importance of listening to others. Ross initially did

not like working with groups in the beginning and, in fact, worried about having to work with someone else on projects and assignments. However, he had an epiphany during one particular group class assignment. He realized that each individual had a good idea and combining those ideas made it a great idea. In other words, the whole became greater than the sum of its parts.

Pedagogy

The third theme, *pedagogy*, dealt with *how* the student learned. In such programs, there generally is less lecturing by the instructors. He or she becomes a *knowledgeable facilitator,* presenting material in a more collaborative fashion. Over time, some of the participants found that there was a shift in their learning preferences and that this more non-traditional style of education was a preferred way of learning for them. Some were initially nervous and worried about the amount of writing in the program. However, over time they adapted and even preferred the writing to the more traditional pen-and-paper test taking they were used to in the past. Amy felt that it was an excellent way to absorb information since you are not just reading and regurgitating the information, but actually relating it to your life. She realized that she would much rather write a meaningful paper after having gone through the program than take a test. This mind shift in preference was a surprise to many.

Self-Concept

The last major theme was *self-concept.* Many participants experienced a shift in how they viewed themselves and the world in which they lived. Sometimes this shift was subtle and other times it was more obvious. The change could be in self-development, such as overcoming a fear or learning more about oneself as a person. Another area of change could be in how one viewed him or herself as a learner.

David struggled before as a younger student. Now he found he exceeded his expectations as a student and actually enjoyed his studies, taking pride in his work.

Another area of change related to self-concept that participants experienced was an increase in self-confidence. Charlene felt that she was smarter than what she thought of herself as a younger student. She used to be the "class clown" and thought of as "spacey." However, as she went through her program and got good grades, she realized that she was smarter than a lot of people gave her credit in the past. Kayla knew she was a good student with a strong work ethic, but had lacked the confidence to believe she could finish her bachelor's degree. She realized that her success in the program would follow her into other aspects of her life and believed in her own ability to overcome barriers.

Conclusion

The insights gained from participants were powerful and reflected the importance they placed on their educational experiences. My conclusion was that students could experience transformative learning as a result of being in an accelerated program. The study illuminated the potential for change and growth as a result of their experiences. From an ethical perspective, I do not feel that instructors should *expect* students to experience transformative learning, but instructors can and should provide the means for students to transform and be open to that happening. Of course, instructors need to be familiar with the concepts of transformative learning to promote its potential in the classroom. That, in itself, can be a daunting task. I smile when I think of my own hesitation in attempting to explain what it means when asked. I like to think that little by little I am becoming more confident in my ability to engage in such discussion. I am reminded of the alchemist who could turn base metal into gold. Adult educators have the ability to help others transform into something more precious than gold. Humans have the potential for greatness and we are able to help them transform and accomplish their goals, overcoming barriers, if that is what they want and need. I am also reminded of the image of a *kaleidoscope.* Inside are random light catchers but when you shake and twist the kaleidoscope, those crystals turn into beautiful, unique images. Adult educators have the power to "shake things up" both internally and within others to change into beautiful, unique people with enormous potential.

As a final note, I believe this research study only touched the surface of the relationship of transformative learning and accelerated programs. Future studies could include students in graduate programs and also those in online undergraduate or graduate degree programs and whatever next big thing emerges in adult education.

Note: This paper is based on a doctoral dissertation entitled, "Blood, Sweat and Tears: Insights into the Lived Experiences of Graduates of an Accelerated Undergraduate Degree Completion Program, A

Phenomenological Study" completed April 2009 by the author. The complete reference is noted in the reference list at the end of the paper.

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Insight Dialogue: A Practice for Engaging the Collective Wisdom of a Group

Pat Fox, Lisa Herman, Margot Hovey, Pat McCarver, Terri O'Fallon

Abstract

Insight Dialogue is a collective meditation practice of deeply mindful exchange. The mindful, dialogic sharing that occurs in the group is placed in the middle of the group and released as belonging to the wisdom of the group rather than to any one individual. The practice combines the practice of solitary mindfulness meditation with the practice of group dialogue, as developed by David Bohm. The practice of Insight Dialogue, originally developed by Terri O'Fallon and Gregory Kramer (1997) was further refined by Terri O'Fallon (2012) and will be discussed below.

Over the years of animal existence, many different types of groups have been created from simple family groups, to tribes, to work groups to therapy groups as well as many others. What these groups have in common is some particular reason or need to be and work together on a common purpose or goal. One definition suggests "A group is a collection of individuals who have relations to one another that make them interdependent to some significant degree. As so defined, the term group refers to a class of social entities having in common the property of interdependence among the constituent members" (Cartwright & Zander, 1960, p. 60).

How a human group functions once it is formed has been the subject of much discussion. There are many theories on group process, group development and group dynamics. Social learning theorist, Albert Bandura (2009), posits on group action "Social cognitive theory distinguishes among three groups of agency: direct personal agency; proxy agency that relies on others to act on one's behest to secure desired outcomes; and collective agency exercised through group action" (p. 270). As the world has grown more complex, it has become increasingly clear that working together with other individuals is more likely to achieve success for all. This interdependence, the need to rely on each other to accomplish a group purpose or goal, creates a bond among group members. Successful groups learn how to work with that bond to communicate effectively with each other as they work and learn together.

"Research findings, in general, indicate that group cohesiveness is achieved through good communication between group members, readiness of group members to be influenced by the group, consensus among group attitudes on attitudes and beliefs that relate to group functioning, and a sense of responsibility toward each other among group members" (Deutsch, 1973, in McCarver 2003)

As groups begin to develop the trust they need to work together and create their own group culture, the need for communication is even more important to keep the group on track. Group self-efficacy, or the belief that the group itself is able to achieve the result it desires, is a key to successful group process. "Perceived collective efficacy is not simply the sum of the efficacy beliefs of individual members. Rather, it is an emergent group-level property that embodies the coordinative and interactive dynamics of group functioning (Bandura, 2002, p. 269)

Much has been written about collective learning and stages of group development. Tuckman (1965), assuming a group came together to accomplish a task, introduced the now well-known developmental stages of small groups as follows:

Five Stages of Group Development

	Group Structure The pattern of interpersonal relationships; the way members act and relate to one another	**Task Activity** The content of interaction as related to the task at hand.
Forming: orientation, testing and dependence	Testing and dependence	Orientation to the task
Storming: resistance to group influence and task requirements	Intragroup conflict	Emotional response to task demands

Norming: openness to other group members	Ingroup feeling and cohesiveness develop; new standards evolve and new roles are adopted	Open exchange of relevant interpretations; intimate, personal opinions are expressed
Performing: constructive action	Roles become flexible and functional; structural issues have been resolved; structure can support task performance	Interpersonal structure becomes the tool of task activities; group energy is channeled into the task; solutions can emerge
Adjourning: disengagement	Anxiety about separation and termination; sadness; feelings toward leader and group members	Self-evaluation

Insight Dialogue

What happens when a group comes together, not specifically to accomplish a task, but rather to gather the wisdom of all its members? Wisdom might be generated simply requesting feedback from members or assigning individual pieces of work to group members; however, there is also the possibility that the group itself working together can generate knowledge. 'Brain-storming' is a known phenomenon where creative thinking bounces from individual inspiration to individual inspiration in a group. But what if there might be a process where the group itself delves into a collective realm where no individual on their own could access? What if there is a 'co-intelligence' that "involves accessing the wisdom of the whole on behalf of the whole" (Co-Intelligence Institute, n.d.)?

In a study working with South African residents to create sustainable uses of local waterways, researchers used different strategies to gather the collective group intelligence of the native people.

"The culture of knowledge sharing may be developed, implemented and practised through the use of technology, holding knowledge sharing sessions among communities of practice and storytelling. Storytelling has the potential to build positive relations in communities. As communities of practice, storytelling may facilitate the location and use of the collective intelligence of communities. On the other hand, information and communication technologies add icing to the cake by facilitating the use and sharing of the collective intelligence." (Mosia & Ngulube, 2005, pp. 183)."

These researchers understood the possibility of collective knowing through many possibilities. Insight Dialogue is a practice that recognizes that new ways of knowing as well as building the capacity to learn and tap into group wisdom are important for the evolution of a group. The group can move beyond obligation, problem-solving or mandated activity and flow into a place of openness, so that the very nature of the group changes. This is where group process can become emergent and the group itself can create its own agenda and identify its own desires before it heads towards tasks (or not). Insight Dialogue enfolds the practices of dialogue and meditation. When people come together in groups, to work together, share information or just share experiences, they generally agree to a set of expectations or guidelines for their participation. Insight Dialogue offers a forum and guidelines for the examination of individual and group thought process as collective wisdom is generated.

Dialogue is a forum for the examination of individual and group thought processes. As opposed to a debate it aims for the experiencing of a coherent movement of thought in a group, not only at the level we recognize but also at the tacit or unspoken level. Its intention is to free the thought process of the group from its rigid collective conditioning.

Dialogue calls for the practice of bringing awareness to judgment, the suspension of assumptions, taking in all opinions, and observing one's own and other's reactions in the moment. As one observes, a familiarity is developed as to how thought works. This kind of interchange develops new habits of communicating and knowing oneself and others deeply. Dialogue is animated by an interest in collective learning about how we think and act. With the awakening of intelligence in a collective context, the process of thought itself can be changed. This can lead to profound personal and group transformation.

Dialogue lends itself philosophically to a joining with meditation, because both have in common the focus on processes. Amongst the differences between the two are that 1) dialogue is done with other people and meditation is practiced individually, and 2) that meditation contains explicit practices to develop contemplation in which we can know immediate awareness and Presence.

Insight Dialogue includes embodied mindfulness meditation. This begins with the practice of discovering and developing one's natural intrinsic awareness of our thoughts, our mind states, such as boredom, restlessness, sleepiness, dullness, and clarity; our feeling states, such as anger, joy, sadness, and other similar feelings; and bodily sensations usually apparent when one focuses on the place that an emotion resides, vibrations, and other such sensations. We become aware of our own awareness patterns, how we direct that awareness, and how those awareness patterns congregate in group patterns, which may freeze both individual and group development. By combining these two practices, dialogue and mindfulness, we arrive at Insight Dialogue.

In Insight Dialogue we are moving the process of meditation into the world of embodied interpersonal communication. Within this mindfulness practice our thoughts arise, stimulated by our interchange with others. The mindful dialogic sharing that occurs is placed in the middle of the community and released as belonging to the group rather than to any one individual. When each person is attuned to this deep awareness the sharing often represents the group sensibility arising in the moment. Individual attachment to any idea, thought, or sharing can freeze the flow of awareness in the individual and the group.

Insight dialogue guidelines

Preparing for the practice

Insight Dialogue can be practiced at all times by an individual as s/he moves throughout daily life. Even more effective, however, is when a community of people practices together. In either instance, preparation for practice involves a profound relaxation state as one carries out the dialogue.

Begin by breathing deeply and relaxing the body. Take a moment to feel the muscles release and lengthen even if you are in the midst of action. Next relax the mind. Allow it to move freely and openly with no restrictions as you witness its movement. In this process we are learning about the process of dialogue itself as well as about the content of others' words. When we search for outcomes, we may frame everything in the context of what we are seeking and its content, rather than becoming aware of other things that are emerging such as recognizing group habits that are forming that freeze the individual and group processes. Insight Dialogue speaks to a phenomenon that occurs during dialog that is quite fascinating. When a group congeals into Insight Dialogue, the collective intelligence of the group emerges as an entity. It moves though the group, affecting the members in multiple dimensions. It can dig deep into emotional patterns, or unearth old memories, or patterns of thoughts and behaviors. Where the dialog will go can't be predicted. Insight Dialogue gives permission to speak seemingly random thoughts, or some reaction that may be embarrassing, or unearth a different layer, if it requires it. Often, such complex emergents are needed by multiple people in the group and one is always speaking for the whole.
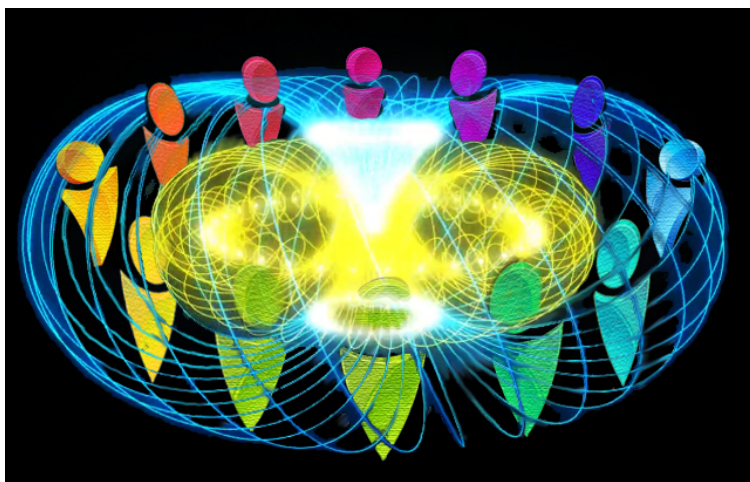
As the guidelines suggest, Insight Dialogue is a practice that is different from ordinary conversation. It's different than an open forum. It's different, because the positioning is different. The goal is different. The goal is-there is no goal. The guidelines seem simple enough, yet really they aren't. They challenge habituated patterns of interaction in groups in ways that allow for a figure/ground shift. Figure/ground shifts are usually discussed in the context of right-brain exercises, and in many ways, Insight Dialog is a similar exercise. There are natural tendencies that pull you back toward the habitual interactions. You find yourself slipping back into them, you struggle to stop it. You feel yourself shifting into the Dialogue's space, it feels good, and for a time, you're in the flow. You don't have to think about the guidelines, because you spontaneously know them like you've done it all your life. Then someone says something that triggers you. You snap back to your individual self with all the sting of a rubber band snapping against your face. Then you struggle. You find yourself judging. It's good, or it's bad. The right thing to say, or the wrong thing to say. 'She said that because she…' Then you suddenly recognize that not only are you judging the statement, you're judging her. Then you start thinking about all the assumptions behind what you just did. Then you notice you're judging yourself. You're stuck in a loop. Then someone else says what you were just thinking. You come to an abrupt halt, and take a deep breath. You realize it's not your breath, it's the breath of the group. You slip back in. You slow down.

You go deeper. You can feel something that's a little like being at the shoreline. Waves gently rock you. In. Out. In. Out. You can feel someone else snap out, momentarily individuated. Your heart swells in a compassionate beat. You remember how that feels. You remember that stinging of the rubber band snap, and you hold them in your mind. The gravity in the room shifts a little bit as they spiral through their thoughts, their assumptions, their judgments, their angst. You breathe it in. A thought pops into your mind like an acorn dropping on your head. You know it's not yours. But you wonder if you're supposed to speak it. You hold it there just for a moment, and you feel the gravity in the room shift again, and the thought leaves your mind in favor of someone else's lips. You smile. You go deeper. You lose yourself in the tide. You feel it circle around the group. You feel it breathing. You feel yourself lifting up just a little, and start to notice that it moves toward who is about to speak. The suddenly it shifts to you, and you speak. You're just a little surprised because you weren't expecting to speak. But as the words flow from your mouth, you notice that some of the words seems to be coming from the tide itself, as if you're just giving it voice, but then you have something to add, and just at that second you understand why it chose you to speak it. And when you cease speaking, as the tide rolls around the room for a moment, you remember earlier when you wondered if you were supposed to speak that other thought, and realize that if it's your turn to speak, you don't wonder.

<div align="center">The Practice Guidelines:</div>
<div align="center">These guidelines, assist with the development of the benefits from this practice.</div>

<div align="center">1. Commitment</div>
Show up. Pay attention. This includes attention to thought, mind states, body sensations and feelings, in one's self and others.

Commitment will make the inevitable silences of participants a means of practice. This commitment eventually will be driven by understanding derived from learning to "be" from this experience itself. Commitment is the cornerstone of the process. If a group has been working with Dialog for a time, this guideline is imbibed with a sense of trust. But even with practice, committing to the duration can be challenging. Dialog sometimes pushes emotion buttons, and it's not unusual to have an emotion escape response if the dialog rolls around to challenge some assumptions that are deeply entrenched. As the cornerstone, this is the guideline to fall back to when the other guidelines fail you.

<div align="center">2. Bring Awareness to process as topics emerge.</div>
In this process we are learning about the process of dialogue itself as well as about the content of others' words. When we search for outcomes, we may frame everything in the context of what we are seeking and its content, rather than becoming aware of other things that are emerging such as recognizing group habits that are forming that freeze the individual and group processes.

3. Do you privilege any speakers?
Address your comments so that everyone in the group can comment or be a part of the dialogue.

When each person's contributions are received fully, the spontaneous creativity of each participant becomes available to the entire group. It is as if the thought has arisen in the integral field of the group's awareness and now belongs within it to everyone.

You may also notice subtle preferences or attraction to some member's contributions and aversion to others. This may affect your ability to listen whole-heartedly to each person. This is a message to relax and open your wholehearted listening for every person, and to search for the deepest meaning that their contribution offers. This guideline is surprisingly difficult. As a group comes together in dialogue, a quick survey of the members can quickly identify the initial conditions of roles and status. As dialogue unfolds, however, a multitude of layers roles will emerge. Formal titles, positions, or hierarchies can quickly give way to more subtle roles, such as the person who seems 'too emotional,' or 'deeply insightful.' These roles, have a status associated with them too, and can sometimes be trickier to recognize and dismantle.

You may begin to notice that something someone shares is a thought that has also arisen in your own mind. It is likely that others in the group may be having this same experience. We could ask ourselves, " Whose idea is this? Do ideas belong to the people that say them first? Do they belong to anyone? Do they arise out of the group creativity? " How can the sovereignty of the individual and the creativity of the group process be honored simultaneously?
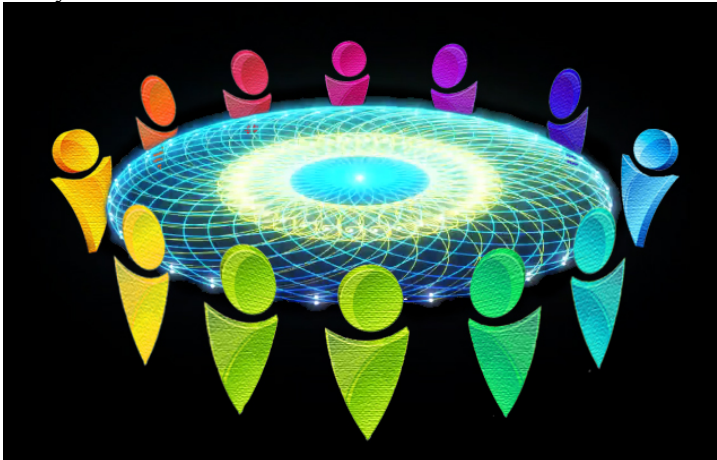
4. Slow Down
As we listen to others and prepare to respond, take the time to pause and relax throughout the process. Rest in awareness, rather than being dominated by habits of response.

With this guideline we are explicitly crossing the lines that may have separated dialogue with others, and observation of ourselves into the Awareness that holds it all, including the ideas as they form and reactions as they occur. This guideline creates the grounding element of the dialog. As the members congeal into a group, and the patterns of thoughts and words self organize into a dialog session, it is important to offer the quiet grounding of relaxation, breathing, and holding and noticing thoughts and feelings as they arise. Like other forms of meditation, having patience with the wanderings of the mind is important. Being able to pause, relax, and contemplate the process brings forward that patience.

5. Balance Active Investigation with Statements
Expression of spontaneous creativity may emerge in these interchanges. Sharing these responses is the interactive part of this process. This is balanced with investigation or inquiry. We look deeply at what others say, and also at what we say ourselves. Everyone can benefit from this kind of generous curiosity.

As we do this investigation, you may notice feelings arising in yourself related to material that you presented that is being questioned. Put your contributions in the center to be held by the group.

6. Seek out, reveal and suspend assumptions.

Actively attempt to discover underlying beliefs, assumptions and opinions upon which individual and collective behavior is predicated.

By careful reflection during interchange with others, we will be more likely to discover these frames of reference that silently guide, condition and freeze our thinking and behavior. By releasing these rigid and often unconscious habits we support the flow of the group processes.

Hidden assumptions are not always easy to become aware of, precisely because they are unconscious, tacit, and very automatic. There are many assumptions associated with gender, race, handicap, age, and so forth, which most people are fully aware of. There are many others that can be subtler that we aren't aware of such as our own projections, and collective projections, or the assumption that all members of a group hold in common the meanings of key words. Questioning the meanings of key words can often lead to fruitful explorations of meaning as it unfolds.
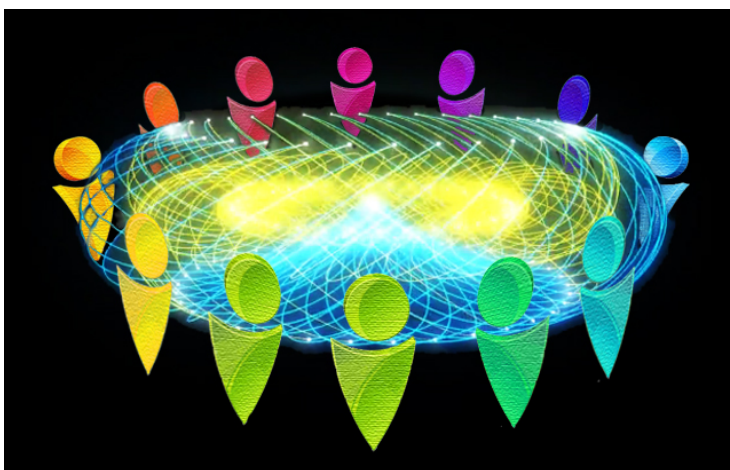
7. Turn Your Judgments Back on Yourself

Judgments arise in thought very quickly. By being aware of these judgments we may discover new ways of understanding other people's outlooks and to a fresh understanding of what is being said.

We now must ask, what is a "judgment"? Judgments are basically "opinions", and can be either positive or negative. Resting in these opinions without rejecting or accepting them can move one into openness for compassion and love. We might explore these judgments as possible projections-our own shadow. A simple way to do this is to bring awareness to the judgments you have and then add "Yes, this is also me."

When a number of people in a group react with a negative judgment to a specific person or idea, it is common to try to reject either the idea or the person from the group. If the group were to examine the assumptions under the judgment or rejection, they may find that they are trying to get away from their discomfort and thus are either withdrawing themselves or attacking by rejecting one or more of their members. When the assumptions are carefully examined it is common to find that the area the group feels most uncomfortable with is the area they most need to look at within themselves so this is why they want to reject or withdraw.

In this case, it is important to stay with the idea or the individuals in the group rather than to project and scapegoat. This is a very difficult area to work with but highly rewarding in terms of discovering one's own hidden assumptions and judgments.

8. Be Honest.

Note any thoughts that you are hesitant to say or that occur concurrently with the main topic you are considering.

As obscurations are investigated and layers fall away, fresh spontaneous responses may arise that will be appropriate to share. These responses may have been in awareness but so conditioned by these obscurations that their expression was inhibited.

These thoughts are often the "honest" thoughts, and if brought forth can promote authentic and appropriate interactions between participants, build trust, and shed new light on the group's processes and creativity.

With bare awareness, we notice, time and again, how certain actions of ours or others arouse conditioned responses within. We perceive new details of our thinking habits and share with others some elements of that conditioning; in this way the common elements of our conditioning begin to emerge. The commonalties are a manifestation, a map, of our shared underlying dynamics of mind. Knowing that our processes have much in common with others, the door opens to compassion and loving kindness, to the resonance within us to the pain of others. This assists us in releasing the culturally conditioned habitual mind that can inhibit the formation of a field of understanding and creativity.

Summary

Insight Dialogue is a community of practice approach that can unfetter a collective from its autopoietic habits, unconscious projections, scapegoating, and assumptions, which can freeze the growth and development of individuals and groups. Insight Dialogue allows for depth of insight and emergent developmental attainment.

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Nonformal Education: Fostering Individual and Social Change in Rural Africa

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Abstract

The purpose of this study was to explore the practice of nonformal farmer groups (RIPAT) theoretically framed from the perspective of transformative learning theory and nonformal education (NFE). RIPAT are cooperative based agricultural based programs that provide a platform where farmers meet regularly and experientially study the *'how and wh*y' of farming. Through a mixed method design in the Meru District in Northern Tanzania involving participants of several RIPAT programmes, the study revealed an intricate picture of fostering transformative learning within the context of NFE, where findings call into question some long-held assumptions about both.

Introduction

Historically farmers in Meru district, as in the rest of Tanzania, have had very poor experiences with being forced to work in collective organizations sponsored by socialist inspired state during 1970s and 1980s. Twenty years of liberalization since 1990 has further undermined local traditions for collaboration. In response to this concern farmers in Meru district have been a part of an agricultural development and adult education program (RIPAT) that supports farmers though a cooperative-based learning process (participatory, voluntary, experiential). Research has shown not only has this approach led to an increase in agricultural production, but the Tanzanian local government officials have noted that farmers also changed positively as a group and as individuals (e.g., greater self-efficacy) (Friis-Hansen, Aben & Duveskog, 2012).

RIPAT is organizing farmers into nonformal education farmer groups comprising of 35 farmers to their social, organizational and technological skills and capacity, while simultaneously exposing these groups to a basket of technological options, with a view to enable the participants become food secure through enhanced agricultural productivity. This dual approach is highly relevant for the benefitting Tanzania farmers and consistent with experience from East Africa (Friis-Hansen & Duveskog, 2011) showing that smallholder agricultural development leading to poverty reduction is possible through a *combination* of social empowerment and access to relevant technologies. RIPAT engages farmers with a predetermined basket of farming technology options through a nonformal approach to education. Members of RIPAT groups participate in a collective learning process inclusive of a: (a) theoretical sessions in situ (often under a tree near the experimental field); (b) direct practical experimentation and (iii) collaborative group dialogue and reflections facilitated by RIPAT staff.

In an effort to make sense educationally of what pedagogically contributed to these changes transformative learning was used as a theoretical framework to study the RIPAT program and what it reveals about the practice of fostering transformative learning within the context of nonformal education. Fostering transformative learning (TL) is seen as teaching for change (Mezirow & Taylor, 2009) as learners question deeply held assumptions and are subsequently altered by the experience. Most research about fostering TL has taken place in higher education settings often with "little exploration in non-formal educational settings' (Taylor, 2007, 176). Non-formal education (NFE) a b yproduct of the limitations of the formal educational system, is often seen in contrast to and complementary to formal education. Even though it works in the large shadow of the formal system, NFE possesses unique characteristics that give it significant advantages when responding to the educational needs of marginalised groups, particularly in developing countries (e.g. Jumani et al. 2011; Phatininnart, 2009; Pietilä, 2012). These advantages include, for example, its flexibility for immediate action while providing learning opportunities that have direct application, and its location in close proximity to those in need (Rogers 2005).

In an effort to better understand non-formal education in relationship to fostering personal and social change, few studies have framed their work theoretically on NFE through the lens of transformative learning theory (Easton, Monkman & Miles, 2009; Kollins & Hansma, 2005; Percy, 2005). Although, these studies do make significant inroads into a better understanding of non-formal education and its relationship to transformative learning theory, questions remain. Such as what is unique about the non-formal setting and its role in fostering transformative learning? How does the practice of transformative learning manifest itself in a non-western setting? Also, since many NFE programmes in developing countries emphasise the promotion of

technical skills (instrumental learning), how does this fit within the context of transformative learning that emphasises communicative learning?

In an effort to address these questions and others a recent study was undertaken to better understand the practice of fostering TL within the NFE setting of the RIPAT development intervention. RIPAT groups in Tanzania are community-led NFE programmes that provide a platform where farmers meet regularly to learn and practice improved farming techniques in a collective manner. The NFE in RIPAT group offer a unique combination of conventional teaching and practical work through which participants set up experimentation based on what they have learned. RIPAT as an educational approach offered an interesting setting for exploring the fostering of transformative learning in NFE. Therefore, the purpose of this study was to explore the practice of RIPAT groups and its relationship to the practice of fostering TL within a non-formal setting.

Theoretical Framework

Two theoretical frameworks were used as a lens for this study, that of transformative learning theory and nonformal education. Transformative learning theory was used to understand the change in the daily life of RIPAT participants, particularly of how they make meaning of their farmer field school (FFS) experience (Mezirow, 2000). It provides an understanding of the constructivist context of participatory extension and explaining the nature of change among participants which is consistent with the FFS educational approach (Percy, 2005). Since the early 80's transformative learning theory has been established by extensive research (Cranton & Taylor, 2012), although predominantly within a western context. Only recently has research started to explore the application of this theory of transformation in non-western settings (Mehiuni, 2012; Ntseane & Merriam, 2008; Olutoyin, 2012). A perspective that has direct application for this study is an Afro centric conception of transformative learning (Asante, 1995; Williams, 2003). This non-Eurocentric perspective of transformative learning gives attention to the context dependent nature of transformative learning, and for example, foregrounding the local culture of the FFS farmers and the traditional African value systems and their relationship to transformative learning (Netsane, 2012).

The second theoretical lens is nonformal education informed by Rogers (2005) and Brennan (1997). Rogers' a perspective of nonformal education is explained through the use of a continuum of different forms of education and learning (formal, nonformal, participatory, and informal learning), in relationship to three characteristics: flexibility, participation and contextualization. Brennan, on the other hand explores nonformal education in relationship to itself using three conceptual tools (system, setting, process), Like Rogers, Brennan brings greater clarity to variability of NFE, but little is still known about the everyday practices of NFE and challenges it poses for fostering transformative learning.

Methodology

The study used a sequential mixed method research design (Creswell, 2010). The first step involved qualitative interviews of 15 individuals and 20 groups among members of RIPAT groups. The both qualitative and quantitative interviews were carried out May-August 2011 assisted by field assistants and by a member of each of the 16 RIPAT farmer groups involved in the study. The qualitative interviews were explorative allowing farmers to articulate their own experiences with involvement in NFE under RIPAT. During the interview process, the qualitative interviews gradually became more stratified, as five themes concerning the practice of transformative learning emerged, namely: strong instrumental emphasis in learning; student presentation to the group; hands-on practical learning; collaborative learning; and reflection by students over the life and existing knowledge. These themes were similar to those of an earlier study involving Farmer Field School groups from Kenya (Duveskog, Friis-Hansen, & Taylor, 2011). The qualitative interviews were analyzed using NVIVO (version 8) computer software. These five themes were later translated in the second step of the study into a survey questionnaire that was implemented as an inventory among all the remaining 296 farmers that participation in the RIPAT 1 program in Tanzania. Farmers were asked to strongly agree; neither agree or disagree; or strongly disagree with a number of statements that related to each of the five themes. Farmers were moreover asked recall their experience 5 years earlier, before their involvement in the NFE program.

Findings

Participants of RIPAT groups express that "they were not used to work together in groups" and that there was a generally "low level trust between themselves and other farmers in the community" before their involvement in the RIPAT group. Historically farmers in Meru district, as in the rest of Tanzania, have had very poor experiences with being forced to work in groups and with trusting collective organizations sponsored by state during 1970's and 1980's, e.g. forced Ujamaa work, etc. While policies of forced collective activities were abandoned with the introduction of liberalization in the early 1990's, many of the practices and attitudes of state employees continued into the 1990's and beyond. The general distrust among farmers within the community is a reflection of the persistent and repetitive negative experience with involvement in collective activities. In addition, 20 years of liberalization has generally undermined local traditions (such as reciprocal labour arrangements), replacing them with labour relationships (hire of casual labour).

Individual transformation (e.g. significant individual change) found among members of RIPAT groups is reflected in an increase of confidence, greater individual agency, a stronger work ethic and commitment to farming, improved outlook on life, and a greater emphasis on planning and analysis when farming.

Change in confidence of individuals among members of RIPAT groups. Both male and female members of RIPAT groups responded that their confidence in themselves had increased. Individual emancipation is particularly striking for women, who through participation in RIPAT groups have become more confident of their own knowledge and skills and have become used to articulating their view in the mixed-gender RIPAT group to which they belong. This is supported by the quantitative survey reporting that 95% of RIPAT group members strongly agreeing to a statement that they are able speak out in front of a large group in confidence (compared with 22% before joining RIPAT).

Change in work ethics. Many statements ding the group interviews support the proposition that farmers work ethics has greatly improved. Many groups have formulated and decided on strict group by-laws that involve stiff penalties for not participating in planned group work or learning activities. This has ensured high attendance. However, more importantly, working as a group with people they trust seem to stimulate members to work hard, both in the group and in their individual plots. The labour productivity for members of RIPAT groups is likely to have increased considerable as they have adopted the improved technologies in their fields, providing a strong incentive to work harder.

Emphasis on planning and analysis. During group interviews farmers gave examples on how the teaching and practice in RIPAT groups had taught them to plan farming activities based on an enhanced understanding of costs and benefits of the enterprise. These skills are linked to their record keeping in the form of the RIPAT Farmer Book. The survey indicates that 95% strongly agree with the statement "My analytical and management skills are good" (compared with 26% before RIPAT).

Changes in household gender roles and relationship among members of RIPAT groups

Joint household decision making. As result of participating in RIPAT groups, farmers expressed a significant change in the relationship with their spouse in terms of increased collaboration and joint decision-making. This change was often seen as something new and different from the traditional culture where the man makes most decisions. One women from the Jimboe RIPAT group expressed "I now sit down at the table to discuss and plan farming next year with my husband". The survey showed an increase from 35% to 95% (from before RIPAT) of farmers who agreed to the statement that "Farming decisions are taken jointly in the household."

Change in view of women by male members of RIPAT. During group interviews men were acknowledged that eyes had been opened for the role of women in agricultural production. Before joining RIPAT, a common view among men was that that women need to be told what to do, especially when it comes to investments and use of money. This change in view seems to have come about as a side-effect of men observing the skills and knowledge of female RIPAT group members. The survey confirmed this, finding an increase from 32% (before RIPAT) to 81% (now) of men who agreed to the statement that, "Women can be good economic actors"

Noise in the household (argues and quarrels between man and wife) has reduced following farmers' involvement in RIPAT groups, and some farmers expressed how there "now there was more peace in the home." One reason mentioned for this 'noise' is financial stress and conflicting priorities for spending household income. RIPAT group members give two reasons for the decrease: that they are now less economically challenged, because of increased food security and income, but also because of the more equal power balance created when both partners contribute to the upkeep of the family. One man stated that he felt relief that he was no longer alone being the breadwinner in the family. The survey showed that only 4% strongly agree that "there is noise and conflict within my household", compared with 59% before RIPAT.

Change in relations between RIPAT participants and the local community. All members interviewed agreed that their relationship with, and status in the community has dramatically changed as a result of their involvement in RIPAT groups. As consequence of their new knowledge and access to planting material, RIPAT group members interviewed gave the impression that they were actively involved with disseminating knowledge and material about farming to other farmers in the community. This is reflected by the survey indicating an increase from 31% to 97% (since before RIPAT) of the group members strongly agreeing to the statement "I am sharing knowledge with the community". Everyone interviewed moreover agreed that there had been a dramatic shift in how they are viewed by the community. Many RIPAT group members stated that they used to be viewed

as "nothing", just average poor farmers. All RIPAT farmers interviewed agreed that they now have high social status in the community and are being viewed as resource persons.

Changes in local leadership and organization. Some RIPAT group members use their increased confidence, capacity and community status to become leaders. Leadership roles included being a chairman or secretary of newly formed SACCO or marketing cooperatives, membership of village government, or leaders of a group of committee in a local church. The survey confirmed this finding showed by an increase (from 48% to 85%) in RIPAT group members who strongly agree to the statement: "I hold leadership positions within the community".

Discussion and implications

The significant individual changes and changes in gender roles as the result of participating in RIPAT program offers a number of insights about transformative learning in nonformal settings. First, even though the farmers play a major role in deciding among technology options and what skills they want to learn, the emphasis of the RIPAT groups is instrumental learning (analyzing plant growth, pest management). It seems that promoting instrumental learning, greater food production, and overall well-being run parallel mutually reinforcing the processes of transformative change. Second, nonformal education within RIPAT groups regularly involves participants giving didactic technical presentations to the whole group based on data collected from test field plots. This approach seems counter to most of adult learning that is grounded in constructivist theory. Although, these individual presentations of technical information about farming generally followed with small group discussions of what was learned from field experiences, it seems that the act of presenting important information to peers leads to greater self-efficacy among participants as they learned to present. Third, by combining experimental sessions (participants working in a common group fields plot, testing new ideas and practices about farming) with group discussions, lectures and field demonstrations, collectively they emerge as a means for promoting critical decision-making skills among participants dealing with farming challenges. A third insight from the practice of RIPAT groups was the strong emphasis on coed collaborative groups where farmers learn from each other. In addition to promoting community solidarity and establishing a strong commercial base, the coed cooperative approach resulted in significant personal change for women, and also how men change the way they think about the role of women in a highly patriarchal society. It is likely that reflection occurs implicitly in RIPAT cooperative groups and creates the opportunity to question cultural norms (e.g., gender roles). When trust is built within the group, men and women begin to challenge the norms and traditions that are constraining households in increasing production and marketing. Change in norms seems to first take place within the group, and from the group these changes are transferred to the individual member households and are ultimately accepted by the community. Transformative learning seems to be unfolding both as an individual and collective process simultaneously.

The findings of this study reveal a complex picture of fostering of transformative learning, inclusive of both traditional and non-traditional approaches to teaching adults in nonformal educational settings. The RIPAT groups is a highly structured education program with an epistemological emphasis on instrumental learning couched within a principles of cooperative and experiential learning using the farm field as the primary learning site. At the same time these groups rely both on a transmission model of teaching, participatory decision-making (e.g. constructivist) and small group discussion. Furthermore, the RIPAT potentially offer insight into the reciprocal effects of individual transformation on small communities.

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Making Connections: Radical Presence in the Teaching and Learning Of College Students with Learning Disabilities and Attention Deficits

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Abstract

With forty years of combined experience in the field of learning disabilities, we would like to share how transformative learning theory ignites and challenges our practice. Our workshop utilizes stories to focus on connection, compassion, and radical presence in the circle of teaching and learning. Through stories we discover signs of deeper reality and deeper human possibilities especially when working with students with LD/ADHD. We hope participants will begin to experience what radical presence feels and looks like, to explore compassion and presence in teaching and to discover through stories and signs transformation in our teaching and learning lives.

Keywords

Attention Deficits, Compassion, Connection, Learning Disabilities, Radical Presence, Transformative Learning

Introduction

Transformational learning is a circle of connection; connection to one another, connection to course work, and connection globally. Within the safety of the relationship, learners and teachers have the opportunity to challenge assumptions especially regarding disability, make mistakes, and connect to an openness to learn, creating a space to learn with courage. Understanding our connection to our students and they to us as both learners and teachers, understanding our connection to our interior lives and helping students connect to their interior lives, can lead our students to more expansive connections with each other, with their course work and with their world.

Transformative Teaching Practice

By approaching transformative learning from a learning disabilities perspective, a different dimension is possible when applying the tenets of transformative learning. Dialogue and story telling are integral to our practice when working with our adult students with learning disabilities (LD) and attention deficits (ADHD). " Dialogue becomes the medium for critical reflection to be put into action, where experience is reflected on, assumptions and beliefs are questioned, and habits of mind are ultimately transformed" (Taylor, 2009, p. 9). Adult students with learning disabilities and attention deficits attending college frequently struggle with shame and co-existing psychological difficulties (Barkley, 2010; Tuckman, 2009). Students have assumptions about themselves as learners, which can be reflected back to them by their professors. Evidenced in our practice, adult college students with LD/ADHD frequently develop habits of mind that have enabled them to cope with their academic experiences, and some of these habits have created barriers to learning. Dialogue and story telling offer the teacher access to student meaning-making of their experiences and a place where we as teachers can join our students to explore assumptions about who they are as learners, to try new learning approaches, and to examine evidence of deep change.

Through dialogue and stories, students share their shame in having disabilities, their vulnerabilities when interacting with others, and their challenges when confronting their environments. Most importantly, student stories disclose different ways they meet challenge, and this is where we as teachers discover strengths. This is where the circle begins.

The work we do with our students is the opposite of finding solutions. As special educators, we have been culturalized to impose what we think students need; however, the joy of learning and teaching is to discover with our students their own courage to commit to who they really are as learners rather than who they think they should be (Brown, 2010). In traditional teaching we try to make the uncertain certain. In our practice, we strive to engage and support students in the paradox and ambiguity of being intellectually bright and learning disabled. We offer them the freedom to explore the ambiguity and paradox to be themselves. This exploration involves the whole person and active learning connects student and teacher to vulnerability, courage, compassion, and creativity. " The connection is why we are here. In order for connection to happen, we have to be excruciatingly seen" (Brown, 2010). As teachers, it is our job to do the seeing with our students. Through radical presence, we are completely engaged in our students' processes for learning; pulling teaching and learning out of their process. We tell students what we see as their stories unfold, supporting them in their efforts to learn about themselves and we in turn are enriched by their stories. Responding to student stories, we risk students seeing us by having the courage to tell parts of our stories. We see the connections between student stories and our stories, making us more vulnerable, which

opens up creativity. "Vulnerability is the birthplace of innovation, creativity, and change" (Brown, 2010). Here is the circle.

Workshop Outline

"The real voyage of discovery consists not of having new landscapes but having new eyes." Marcel Proust

Through stories we can discover signs of deeper reality and deeper human possibilities especially when working with students with LD/ADHD. Utilizing stories, the workshop focuses on compassion, connection, and radical presence in the circle of teaching and learning. By offering this workshop, we hope we can help participants (1) get a sense of what radical presence feels and looks like in a room, (2) explore, in an experiential way, compassion and presence in teaching, and (3) discover, through dialogue, stories and signs regarding radical presence in our teaching and learning lives.

The structure of the workshop is as follows:

I. Introduction

> Presenters offer a brief foundation to frame the workshop for participants.

II. Interviewing

> Given a brief interview guide, participants pair off and interview each other.
>
> With the interview responses, participants introduce their partners to the
>
> group using an I/You technique.

III. Brainstorming

> Presenters and participants together make meaning of the terms *compassion, connection,* and *radical presence* in teaching.

IV. Modeling

> Presenters tell stories to illustrate *compassion, connection,* and *radical*
>
> *presence* in their teaching practice.

V. Meditating

> Presenters lead a brief meditation to prepare for the next part of the
>
> workshop.

VI. Writing

> Participants write about experiences that surprised or changed something in
>
> their lives or in teaching; something unexpected that connected them to
>
> others or, in a deeper way, to themselves.

VII. Sharing

> Those who want to speak can share written experiences.

VIII. Responding

Presenters and participants respond to stories.

IX. Summarizing

Presenters and participants review their workshop experience.

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The Journey of Transforming Virtual Relationships

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Abstract

We live in an increasingly virtual world that promises to eliminate the friction of distance, time, and interaction. Diverse and dispersed co-workers are the rule rather than the exception. Working collectively, effectively, and productively requires us to be present and responsive to each other even when we are physically separated. In this highly experiential session, pre-registered participants will integrate virtual teamwork theory with practical processes and social tools. Participants will engage in a real-time collaborative experience prior to and during the conference through a revue and review of best practices and protocols developed during the pre-work and conference session.

Keywords

Virtual relationships, virtual teams, social media, collaboration, virtual interactions, teamwork, remote teams, communications, innovation, shared meaning, shared vision, collaboration, collaboration technology

The Journey of Transforming Virtual Relationships

We live in an increasingly virtual world that promises to eliminate the friction of distance, time, and interaction. Diverse and dispersed co-workers are the rule rather than the exception. Today's global market coupled with the frenetic pace of change and technological advances drive the need for transformational thinking in organizational leadership. This urgency has now risen to mission-critical proportions.

The 2012 IBM CEO study interviewed over 1,700 CEO's from 64 countries representing 18 different industries. The study reported that the most important issue influencing strategic business decisions is the overflow of information and data. Today we have far more raw data to draw from than ever before. Superseding the challenge of information overload is an opportunity to use digital information to create a completely new understanding of human behavior. The CEOs' focus is on analytics that go beyond passive data to draw insights and take actions based on new understandings of the person as a whole human being.

Individuals are sharing information, either implicitly or explicitly, as they participate in social media. It is through this information that we discover the why, how, when, and where to interact with our internal and external clients. Through a systemic and integrated approach to data analysis, we are able to better understand the values, interests, attitudes, and life experiences of individuals and groups. The genius of the leadership role will be to draw insights from information using impactful analytics to drive actions that "... reimagine connections among people" (IBM, 2012, pp. 3-33).

Working collectively, effectively, and productively requires us to be present and responsive to each other even when we are physically separated. The lack of co-location creates a disorienting dilemma (Mezirow, 1990, 1991) that offers an opportunity for transformative change and learning. Conflict that limits a team's ability to work effectively can be provoked when stress manifests among dispersed and diverse members. In contrast, tasks and relationships can become interdependent and team members' diversity becomes a strength to be built upon rather than a challenge to be overcome through the skillful use of collaborative technologies.

The disorienting dilemma of virtual relationships can neither be diminished nor avoided. Individuals within organizations are expected to deal with whatever latent and inherent obstacles arise as they strive to achieve organizational objectives. Managing relationships from a distance is difficult when our primary mode of interaction is electronic media and rapidly-changing collaborative technologies. Transforming virtual relationships can be developed as a corporate competency even though it is difficult to achieve when colleagues are separated by geography and culture (Kaifi & Noori, 2011). The disorienting dilemma of physical separation can transform into an opportunity for collaboration that brings improved relationships and positive results.

We are in agreement with Reilly and Lojeski, who viewed virtual distance beyond geographical distance alone (Reilly & Lojesky, 2009). Whereas physical distance has a huge and real presence, it is only one integral part of managing and working remotely. As researchers, educators, and organizational development practitioners, we observe and propose that latitudinal and longitudinal distance requires management of Distance, Delivery, and Relational Aspects for effective and successful virtual engagement. We further propose that challenges that are inherent in the Distance and Delivery Aspects can be alleviated by collaboratively emphasizing and developing the Relational Aspect.

Distance Aspect

The Distance Aspect describes the geographical and physical components that are the traditional focus for managing virtual workers. Location and time zones continue to be essential considerations for ensuring effective collaboration. We maneuver through scarcely navigated waters and have yet to chart a collaborative course that effectively builds relationships across time, place, and space (Duranti & de Almeida, 2012). Challenges are certain when differing time zones and office locations prevent us from working physically together. Multiple issues including cost, nuances of culture, norms of behavior, diversity of language, even weather conditions and seasonal differences increase the sense of physical distance. Despite these challenges of distance, team members can work together effectively by building relationships. According to Pinjali (2007) diverse and dispersed teams can become highly effective when they use collaborative technology, when tasks are interrelated, and successes are interdependent (Pinjali, p. 155).

Communication is an essential consideration in collaborative work. We have become over-reliant on our email comfort zone, resorting to over-use, abuse, or "only use" of this kind of communication. In virtual teams, by necessity, communication is much broader than email, and includes applications that comprise collaborative technologies enabling people to communicate, connect, and coordinate their work. The CEOs in the IBM study believe that "... technology is now driving more organizational change than any other force—even the economy" (p 11). Learning to collaborate virtually involves creating different kinds of conversations—ones that are reciprocal and mutual, and that openly inquire and use reflection to deepen our understanding of the issues that we are exploring (Moore, p.2).

Social media has transformed how we work and collaborate with each other. It supersedes, undermines, and also enhances traditional methods of communication. Social media is the primary communication source for the younger generations in our organizations. One of the CEO's in the IBM study said of C-suite leaders: "We are the e-mail generation; they are the social network generation"(IBM, 2012, p. 23). When new members of the workforce walk in the door, they bring with them new capacities for collaboration, their own infrastructure, and a different social mindset (Tapscott & Williams, 2006). This has great implications for cross-generational synergies. As we integrate multi-modal communications, we can create a relational exchange that moves seamlessly from the individual who has the informational know-how to the person who needs the information. This interchange is a *talent toggle* that shares skills, abilities, and expertise when, where, and how they are needed. Different generations are able to learn from each other for the common good (Gaffney, S., 2007, p.6).

Delivery Aspect

The Delivery Aspect pertains to managing work, workloads, and resources. Whereas the Distance Aspect has been a central focus in managing organizations, the work itself must be accomplished, and we must deliver on commitments to customers, suppliers, and employees. Collaborative methods and practices enable us to succeed together. "CEOs now see technology as an enabler of collaboration and relationships — those essential connections that fuel creativity and innovation" (IBM, 2012. p. 14).

Strong leaders who are knowledgeable about collaborative technologies can make the Delivery Aspect easiest to manage. The greater skill is understanding how, when, and why to use the best technology solution that is appropriate for each task and purpose. "Techno-dexterity refers to the ability that successful leaders have to match the right technology with the right message so it has the most impact" (Reilly & Lojenski, p. 32).

The pace and intensity of technological change and the individual and collective responses to these changes impact organizational relationships and effectiveness. Technological breakdowns reduce flows of information that people need to do their work. Software applications change often, straining human and financial resources. New applications can multiply across different locations, departments, and divisions, creating incoherence and inefficiency. People are not given the time and training needed to adopt new applications and processes. Mastery and commitment are delayed as individuals struggle to learn new tools while continuing striving to meet the requirements of their job.

Additionally, individuals respond differently to technological change and have dissimilar capability levels, exposures, and experiences. In the turmoil of change, people can lose sight of the organization's purpose and become stressed and/or frightened about how change will impact them. Some individuals respond by going stealth when they are being challenged to learn something new. They hide with hope that they can avoid and not have to engage with the next new thing. Fear increases resistance to change, and organizations and their people may become bogged down in patterns of entropy, unable to communicate or collaborate effectively or to deliver on critical responsibilities and commitments.

Neuroscience provides the framework for understanding why fear directly causes poor communication and resistance to change. Brain research reports that fear triggers a response in the amygdala, located within the emotional, or limbic system of the brain. It responds automatically to danger and shuts off higher-level thinking so we can act immediately to ensure our survival. Early humans experienced the threats as saber tooth tigers and physical danger. Contemporary threats are high-pressure meetings, customer complaints, personality conflicts, and technological change. Our response today is the same as if we were experiencing the life-threatening events of the Neanderthal. The amygdala still tries to protect us from danger and is always on and searching for danger, but the context and threats have changed.

The amygdala triggers the secretion of the body's "fight, flight, freeze, friend" hormones mobilizing our whole bodies. It saved our lives when we were avoiding the tigers, and, still operates to protect us today and ensure our survival. The amygdala shuts off higher level thinking and prepares us to act immediately without over-thinking how we should respond to the perceived threat. When we are in 'survival' mode, it is almost impossible for us to be receptive to others or other ideas. The pace of technological change can be overwhelming, triggering a reaction within the amygdala and limbic area of our brains making it more difficult to collaborate, communicate, or be creative. The CEO study described four critical characteristics for the future-proof employee. Not surprisingly, collaboration and communication were the top two characteristics followed by creativity and flexibility (IBM, p. 20).

Communication is a bridge between the Delivery and Relational Aspects of remote interactions. Whereas communication is always necessary, it is vital and essential in virtual work. Daily touchpoints are required to manage operational tasks, timelines, resource allocations, deliverables, and mutual expectations that are the critical communications required in the Delivery Aspect. Leaders need to align people across boundaries of distance, time, and difference and build relationships to meet the challenges of the volatile economic environment and create innovative organizations (Moore, 2012, p. 8). When we are meeting in the same room, we can see each others' expressions, hear tones of voice, and read body language. When we're in different buildings, time zones, cities, or continents, we need to compensate for the lack of physical proximity. To facilitate collaboration, clearer methods and procedures, tools and technologies, and rules of engagement are required to align, coordinate, and accomplish the work.

Context is another bridge that is both delivery and relationally-focused. Contextual clues are needed for developing shared meanings and vision. It is important to differentiate between content and context. Clarity of content is accomplished through collaborative technologies that allow for sharing documents and that add a visual dimension to the interactions.

Context is the background or canvas for the content. It is the environment, the framework, or rules of engagement for the conversation. The simple story of the boy who cried wolf exemplifies this concept. The young boy's content was clear in that a dangerous wolf was lurking. The context, however, prevented his message from landing with the villagers because of his previous attempts to fool them (Gaffney, 2011). Context embeds the practical real-life, real-time, real people components necessary for relating with others remotely.

Simple agreements and rules of engagement regarding contextual considerations are required to operate effectively. The important issues differ from organization to organization and in different cultures and locations. Certain universal considerations exist, however, when managing across the Distance, Delivery, and Relational Aspects. Some of these considerations are common sense, while others are common courtesy.

We make assumptions about context that may or may not be true. For example, we cannot take for granted that everyone is in the office at the same time. We cannot assume that people are in a workplace setting when we are interacting with them. We cannot assume that someone can connect with us when we are ready and want to connect with them. When we are not working in the same place, people's lives are invisible to us. We cannot appreciate whether they are in an airplane, driving a car and unable to text or answer their cell phone, meeting a client, at a

dental appointment, or if there are people in hearing distance who should not hear the conversation. Such considerations necessitate explicit agreements and without assuming any implicit agreement is in effect.

Relational Aspect

Shared meaning and vision are central to the Relational Aspect with collaboration, communication, and trust required to make it a reality. While the Distance and Delivery Aspects are crucial, the Relational Aspect is essential on the journey of traПsforming virtual relationships. It is necessary to balance the three Aspects to create effective organizations with remote workers, and the Relational Aspect is the unifying element that makes innovation and success possible.

Shared Meaning and Vision

The Relational Aspect focuses on the human element and behaviors that are designed to help synchronize and align our actions as we coordinate collective work through language, affect, and learning. Shared meaning evolves from our language as we understand the meaning of terms in the same way. Shared vision is created through the alignment of linguistic meanings with a common purpose and direction. We work together in a flow of neural information and energy as we create shared meaning and vision.

Our neural networks develop through and because of our interactions with others, and we are designed to be in relationship. We consciously and unconsciously take in information from people and the world around us and modify our actions because of what we perceive and learn. We are wired to read emotions, facial expressions, language, and energy, and to attune to others' energy and emotional states because we have a visceral experience of what they are experiencing (Cozolino, 2006, p. 59).

Our brains are interconnected through resonance systems. Mirror neurons give us a direct understanding of another person's experience. We are affected by their joy or sadness. We sense and experience their fear and anxiety. We are so attuned that we actually catch the emotions of others. A strong emotion in a team can ripple out affecting others without anyone being consciously aware. It is difficult to read the emotions of others devoid of the benefits of visual, auditory, and energetic cues. We need to commit to explicitly and consistently making a *call for feelings* that are being experienced in the moment as we relate virtually. The process of eliciting and expressing emotions in remote interactions needs to be embedded into operational conversations as a habitual practice in getting work done. In addition to, "What do you think?" we add, "How do you feel?"

Collaboration, Communication, and Trust

The qualitative aspects of relational communications help us learn to trust and collaboratively work with people who are different from us, especially when our work spaces are dispersed, our cultures diverse, and our context dissimilar. We learn more from our differences if we are willing to listen to another's perspective and challenge our own assumptions.

CEOs interviewed in the 2012 IBM study identified creating open and collaborative environments as necessary to respond appropriately to unpredictable economic conditions. Collaborative technologies help employees learn quickly from each other and thrive in conditions of rapid and relentless change. "Collaboration is the number-one trait CEOs are seeking in their employees with 75 percent of CEOs calling it critical" (2012 IBM CEO study, p. 6). Organizations need to break collaborative boundaries and develop more extensive, sophisticated methods, such as social technologies for learning, collaboration, and for pursuing good ideas.

Organizations have become more globalized and interconnected as boundaries between functions have blurred (IBM, p. 26). We need to enable transparent conversations that surface emotions for effective collaboration. We foster shared meaning and vision when we are attuned emotionally to each other.

Trust

Trust is a relationship between two people wherein one person is trusted and the other does the trusting. Trust is earned, given, and experienced through conversation. It is strategically critical in any personal and professional relationship. (Moment, 1999) describes trust as consisting of four variables: credibility, reliability, intimacy, and self-orientation. Trust is credible when you believe the words of another person. Trust is reliable when one experiences another person as dependable. Trust has an intimacy dimension when one feels safe with another person. Trust has an element of self-orientation that explores and discovers where the trusted person's attention is focused. We seek to understand where the focus of the trusted individual is directed, whether it is on the good of the

whole, on an individual, or on something else. Trust must be sought and sustained in collaborative relationships (Moore, 2009).

The Journey

The journey to transform virtual relationships is as convoluted and complex as the system within which it unfolds. There is no one right way. There is no new normal or stability. Technological change and social media add a layer of complexity that both confounds and exhilarates. Leaders are challenged to draw insights and take actions based on new understandings of human behaviors from overflowing data and information overload. We strive to balance Distance, Delivery, and Relational Aspects in an unpredictable and chaotic era. The relational aspect is central and essential, guiding collaboration, communication, creativity, and flexibility. It requires effort and commitment to create a collaborative environment. The individuals who work together sharing meaning and vision, striving to align and collaborate are foundational in the creation of vital and innovative organizations.

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The Unsustainability Of Legal Practice: The Case For Transformation Of Legal Education And Legal Educators

Kate Galloway and Peter Jones

Abstract

Individualistic, competitive, adversarial…the legal profession faces calls for systemic change as we see an exodus of our brightest minds, high levels of mental distress amongst students and practitioners and a profession that, as a cornerstone of the justice system, is unable to sustain itself let alone deal with global issues of sustainability. The required transformation starts in law school and this paper explores both conceptual approaches in a law curriculum to engender student transformation, and the means by which legal academics' own practice may be transformed within the framework of the law, as well as in terms of practical skills and resultant professional identity.

Introduction

Regulatory systems worldwide are straining to cope with uncertainty, complexity and change in contemporary society. This includes challenges emerging in the arenas of political, cultural, social and increasingly, environmental systems. Legal practitioners, as the gatekeepers of the law in its formulation and practice, are both part of this problem and potentially, its solution. There are calls internationally for law graduates with relevant skills to accompany their discipline knowledge (Weisbrot, 2004), and at the same time, calls for a more critical, socially and ecologically aware attitude to law as a system and as a vocation (Cullinan, 2002; Thornton, 2001; Cotterrell, 1998).

The legal profession in Australia, for example, is groaning under the weight of its own culture; mired in individualism, competition and adversarialism, it is recognised as self-affirming in a masculinist, heteronormative and culturally homogeneous way (Townes O'Brien, 2011; Thornton, 2001). This is resulting in an exodus of our brightest minds, high levels of mental distress amongst both students and practitioners (Kelk et al, 2009), and ultimately a profession that, as a cornerstone of the justice system, is unable to sustain itself.

Students entering the law school often arrive with an externally driven motivation, arguably predisposing them to replicate the behavioural norms of the legal system, yet simultaneously exposing them to the personal and ultimately professional risks inherent in this type of practice (Kelk et al, 2009; Seligman et al, 2001). Yet the traditional approach to legal education, focussing on abstracted content and devoid of skills (Townes O'Brien, 2011; Owen & Davis, 2009) serves to reinforce such behaviours. A growing body of evidence shows that this is not enough to serve our graduates, the profession or indeed society (Kift et al, 2010; Owen & Davis, 2009).

Furthermore, the struggle to embed critique and alternative perspectives within the law degree has endured now for decades internationally (Thornton, 2001) but arguably with marginal impact. The closed loop logic of legal thinking and the doctrinal focus of the law degree reinforce the existing paradigm (Galloway, 2008; Sugarman, 1986), providing little scope for the generation of creative thinking in terms of ecological literacy (Galloway, forthcoming; Jones and Galloway, 2012a; Orr, 1992), Indigenous perspectives (Falk, 2005; Brennan et al, 2005) and other crucial social issues (Carruthers, Skead and Galloway, 2012a; Thornton, 2001).

It is clear that significant transformation is required if the legal profession is to engage with such issues in a meaningful and effective manner. At both individual and institutional levels, such transformation must involve a dramatic shift in worldview, a perspective transformation (Mezirow, 1978, 2000; Taylor, 1998) which calls into question the very underlying assumptions upon which current values and practices are based (Brookfield, 2000). The central challenge then involves identifying the drivers of such change, given the inherently conservative nature of the profession as it currently exists.

It is easy to say that legal educators need to step up to facilitate the transformation of our graduates into practitioners with the capacity to imagine and implement a more just and sustainable future. However, this fails to recognise that legal educators themselves are of the system, rooted within the existing framework of doctrine and thought. Thus, the transformation required exists within a complex matrix addressing both personal and systemic transformation, for students and academics, supporting and supported by transformation within the profession. This transformation needs to exist both within the conceptual framework of the law, as well as in terms of practical skills and resultant professional identity (Cownie, 2004). It reflects knowledge, skills and attitudes of students, academics and legal practitioners, ultimately transforming the legal system itself.

One explanation for the lack of evidence of such shifts within the profession is that law students are not exposed to the kind of disorienting dilemma described by Mezirow (2000) that might engender not only a change in thinking, but action to agitate for solutions to these pressing issues. Cranton (2002, p. 64) provides

a clear description of the nature of such a disorienting experience and the change it can engender, pointing to a process whereby "through some event … an individual becomes aware of holding a limiting or distorted view. If the individual critically examines this view, opens herself to alternatives, and consequently changes the way she sees things, she has transformed some part of how she makes meaning out of the world".

Without exposing our students to such a stimulus and guiding their intellectual, emotional (James, 2011) and spiritual development (Easteal, 2008; Cullinan, 2003) within the context of the law, we in the academy are contributing to the ongoing circularity in the modes of thinking and behaving in the profession. This helps to ensure that the problematic frames of reference underpinning the legal profession, which Mezirow would describe as sets of fixed assumptions and expectations (2003, p. 58), remain unchallenged and unchanged. In this way both individual students and the profession as a whole is shielded from recognising a limited and distorted worldview, and are therefore unlikely to take action to produce significant and beneficial change.

This paper explores both the kinds of conceptual approaches required in a law curriculum, and those who teach it, to engender the critical thinking that is likely to result in a shift in how the law can be understood, and the skills that support a transformation in the way a graduate lawyer is likely to perceive themselves.

The Traditional Common Law Curriculum

The success of the common law globally has been its capacity to adapt, but also its capacity for consistency. Adaptation is evidenced by its reception (or imposition) throughout the Empire and the US, where in each jurisdiction the fundamental tenets have taken on their own flavour according to social, cultural and political context.

Consistency of course has been the product of training and perpetuation of a particular culture within the law that preserves modes of thought and discourages deviation from the central tenets of the law (Kennedy, 1982; Twining, 1986; Sugarman, 1986). In the context of legal education in the US, UK, Canada and Australia at the very least, there is evidence that the undergraduate law curriculum retains a particular focus on these central (doctrinal) tenets to the exclusion of what has been termed 'soft skills' (Sullivan, Colby, Welch Wegner, Bond, & Shulman, 2007; Bailin, 2012). These are skills recognised as crucial for the making of a successful legal practitioner, and they include 'the ability to build and sustain interpersonal relationships…across borders and languages and cultures…[as well as] resilience, self-awareness, and the ability to take multiple perspectives.' (Bailin, 2012) These skills go far beyond the traditional law curriculum, focussing as it does on doctrine through study of appellate decisions, legal problem solving in an adversarial context and legal writing.

In Georgetown University Law School in the US, for example, there has been an extensive survey of the extent to which curriculum not only fails to support the development of soft skills, but how it acts to the detriment of students' personal and even professional development (Bailin, 2012). The findings here echo other US studies (Sullivan et al, 2007; Schultz and Zedeck, 2009) in that the law curriculum is exposed as inadequate to meet the needs of graduate employers. Despite over a decade of calls for curriculum change in the Australian context (Johnstone and Vignaendra, 2003), it is likely this latter point – engaging with the employability discourse of our market-driven education system – that may finally start to see change in the academy.

In Australia too, 'soft skills' are cited amongst the 'graduate attributes' expected of those with a tertiary education. This is supported by 'industry', which apparently seeks graduates with skills including communication, teamwork, initiative and enterprise, planning and organising, self-management and learning (amongst others) (Precision Consulting, 2007). The recent discipline standards project for law (Kift, Israel and Field, 2010) has identified, amongst other things, the soft skills of communication and self-management as threshold learning outcomes indicative of a graduate of law. These standards were developed following widespread consultation, including the academy, the profession, the admitting boards, the judiciary and the student body – indicating acknowledgement of the importance of such skills. This reflects the US experience cited by Bailin (2012).

In spite of this, there are many indications that the Australian law curriculum, like its US counterpart (Bailin, 2012) has not yet managed to accommodate these skills (Carruthers, Skead and Galloway, 2012b; Boag, Poole, Shannon, Patz, & Cadman, 2010). At best, there is significant activity nationally on curriculum reform, prompted by the new (in 2012) national tertiary regulatory body TEQSA, and its anticipated adoption of the threshold learning outcomes as its own standard.

Curriculum Change

While there is now almost certainly an integration of more critical perspectives within the LLB (Parker and Goldsmith, 1998; James 2000, Cownie, 2004), there is a suggestion that this is done on an intellectual level, rather than through inculcating an alternative mode of thought or personal ethical and moral dimension (Owen and Davies, 2009). That is, whatever the disorienting dilemma presented to students, the approach is to intellectualise the problem and resolve it still within existing discourses of law (Parker and Goldsmith, 1998). The distancing of

emotion in the context of legal education represents a now well-documented issue for law students and the lawyers they become (Jones and Galloway, 2012b; Field and Duffy, 2012; James, 2011; Kelk et al, 2009). This is a reflection of the academy's own struggle to shift modes of thought, and students' lack of opportunity to do so.

The dilemma of the profession more broadly has engaged the minds though of a number of academics and practitioners (Townes-O'Brien, 2011; James, 2011; Field and Duffy, 2012; Galloway et al, 2010). Together this work provides a spectrum of practices through which both lawyers' mindset and their practice might shift. It is this movement that represents a grassroots transformation in legal education via the beliefs and practice of individual legal academics – and thereby the potential for a transformative learning experience for law students.

What is telling about contemporary innovations in legal education is that many would be wholly unremarkable to many other disciplines, and in particular, to educators engaged in the practice of transformative education (Jones, 2009, 2011). Yet these innovations in the context of legal education represent a response to law and all it represents that fundamentally differs from a centuries-old acceptance of a particular mode of thought and a particular way of teaching it. In the Australian context, these innovations include: teaching meditation (Marychurch, 2011); alternative dispute resolution as a means of presenting law within an alternative context: principles differ from that of appellate court adversarial reasoning techniques (Field and Duffy, 2012); engaging students in reflective practice as a technique to embed personal morality, ethics within the context of the law – evolution of one's own professional and ethical identity and therefore transformation of modes of thought rather than building solely on doctrine (Westcott and Shircore, 2006; Galloway and Bradshaw, 2010; Galloway et al, 2011).

The outcomes so far of such practice indicate the capacity of *even* the law to engage with transformative practice, through a variety of techniques. The question though, is whether this is enough.

The Practice of Law

In both the US and Australia, recent evidence shows the effect of a lack of self-management skills in sustaining personal mental health and professional identity (Kelk et al, 2009; Bailin, 2012). There is also a demonstrated link between professional misconduct (and unprofessional conduct) and practitioners' capacity to engage in a more self-reflective practice. While there is apparently a dearth of study of the link between mental well-being and effective and ethical legal practice, the link between the two has been drawn (Britton, 2009). Capacity for insight and methods of practice that retain a sense of self are well recognised as supporting a healthy personal outlook (Marychurch, 2011) yet what the Brain & Mind Institute Report (2009) reveals is that self-reflection is antithetical to traditional legal modes of thought, and that these modes of thought are inculcated by common law legal education.

High rates of mental distress in the profession, as well as the law school (Kelk et al, 2009; Vines and Tani, 2009), reveal that there is a fundamental problem with the way in which we teach our lawyers but also in the way in which we practise law. This problem manifests in mental distress of lawyers themselves (Kelk et al, 2009; Seligman, Verkuil and Tang, 2005) but also in the capacity of the profession to engage and promote women and others from outside the mainstream masculine, hetero-normative, elite culture from which the legal profession is normally drawn (Thornton, 1998; Cownie, 2004). This culture results in a large exodus of women in particular, who cannot seem to break through the upper echelons of practice – a consequence of entrenched modes of thought and behaviour in a way that is not sustainable. The transformation needs to start in law school, but simultaneously it needs to be supported within the profession itself.

Designing the law curriculum to include development of so-called 'soft skills', including those of 'self-management' and in particular reflective practice, facilitate the capacity of legal practitioners not only to engage in their practice in a way that is responsive to client needs and indeed a creative practice tailored to resolving contemporary issues including meeting social justice objectives, but also in sustaining their own emotional labour (Galloway and Bradshaw, 2010). In doing so, practitioners have the capacity to engage in more rewarding work that is socially useful and which sustains and promotes their own wellbeing. Consequences flow also to family and community (Zwier and Hamric, 1996; Parker, 2004).

The Dilemma of Transformation

While there is ample support for development of strategies to support transformative learning in students, the challenge for the law lies in a widespread cultural transformation of the profession and the academy – not restricted to those educators already engaged in the transformative project. In an instrumentalist mode, insurers and professional bodies are requiring practitioners to engage in regular professional development including personal management – though this seems unlikely to engender the shift in culture, and Mezirow's (2000, 2003) characterisation of transformation that would truly bring change.

Even if there is a sufficiently disorienting dilemma to bring change in the profession, in the meantime academics are not required to engage even at this level. In terms of changes in mindset to engage in other

conceptual endeavours, such as the teaching of law through the lens of sustainability (Jones and Galloway, 2012a; Galloway, forthcoming) or to embed Indigenous perspectives into the law curriculum (Galloway, 2011; Falk, 2005), there appear already to be significant barriers. In light of the challenge of entrenched modes of thinking evident in the history and fabric of the common law, including legal education, generating the disorienting dilemma (Mezirow, 2000) to facilitate transformation is a dilemma of its own.

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Living a Spiritually Guided Life: A Paradigm for a Sustainable Future on Earth

Anna Gatmon

Abstract

We live in challenging times of financial and ecological crisis, of material overload and spiritual void. In such times, a spiritually guided approach could open up new and creative solutions that would propel us towards more sustainable and wholistic ways of living together and in collaboration with Nature. I propose a model for developing the spiritual capacities of adult learners and, thus, providing conditions conducive to transformational thought and action. In addition, I suggest that a spiritual approach offers opportunities for addressing the spiritual life of adult learners and providing them with embodied spiritual experiences in diverse educational settings.

Keywords

Spirituality, Inner-knowing, Learning, Nature, Education, Spiritual, Spiritual-knowing

Introduction

We live in challenging times of financial and ecological crisis, of material overload and spiritual void, where our political structures are often stuck in the very paradigms that have created our current situation. In such times, a spiritually guided approach could open up new and creative solutions that would propel us towards more sustainable and wholistic ways of living together and in collaboration with Nature. Connecting to the Divine within and living a spiritually guided life can bring renewed depth and meaning into our lives and communities.

Just as the physical world has laws within which we conduct our physical life, so the spiritual world is governed by its own set of rules and laws to which we gain deeper access when we live a spiritually guided life. However, living a spiritually guided life requires learning to intentionally expand our consciousness, be receptive to spiritual inner guidance, and act upon these promptings. When we do expand our consciousness, we access a spiritual set of principles, laws, and possibilities that can only be claimed through direct experience, where the innate intelligence of the universe offers us insight, intuition, and guidance. When we act upon these, spiritual principles can manifest through us. For example, a spiritual, expanded state of consciousness often evokes experiences such as compassion, love, joy, peace, grounding, beauty, creativity, and wholeness. When we approach life situations or face challenges from an expanded state of being in which wholeness, compassion, peace, and creativity are available to us as resources, we open up to transformational thought, choice, and action.

In addition, when we expand our consciousness, we gain access to a larger context of the whole and of any given situation or event; hidden patterns reveal themselves to us; we become attuned to the meaning of synchronicities that appear, and gain deeper understanding of the order and purpose of events and people in our lives. Finally, we can live our lives more attuned to our calling in service of the world, fulfilling the life purpose we have each been given.

Based on my personal experience, my work with others, and the case study I conducted for my doctoral thesis, I have come to identify four ways of spiritual knowing that can be used in a simple, yet profound cyclical process:

1. Knowing Spirit,

2. Identifying a spiritual state,

3. Receiving guidance,

4. Action imbued with Spirit.

These are four distinct types of experience, each with its unique qualities and felt experience. At the same time, they are interrelated, building on and informing each other as dimensions of the phenomenon of spiritual knowing. I will describe these four types of experience in more detail further on, after addressing spirituality in adult education.

I believe that the more adult educators can provide learning conditions for adult learners to develop their inner spiritual life and become their own intuitive spiritual guides, the more we humans can become aligned with both our individual and collective calling towards a better and more sustainable future.

Spirituality in Adult Education

As spirituality is essentially about meaning making (Merriam, Caffarella, & Baumgartner, 2007; Tisdell, 2003), it is an important component in both the theory and practice of wholistic transformative adult education. Furthermore, Daryl Gilley (2005) argues:

> With three-fourths of today's college students expressing a desire—even a need—for a deeper more meaningful existence, a life with purpose and meaning, it may be time to reconsider the role we have assumed as modern teachers . . . and consider the value of embracing the mysterious. (p. 94)

In response to the growing interest in spiritual matters, different adult educators are exploring the importance of spirituality as part of meaning making, as well as ways in which to support the development of spirituality in adult learners by engaging with the spiritual lives of their students in classroom settings (Capeheart-Meningall, 2005; English, 2000; Gilley, 2005; MacKeracher, 2004; Merriam et al., 2007; Tisdell, 2003; Zohar & Marshall, 2000).

For this to continue happening, educators need to be open to explore their own spirituality and find meaningful and creative ways to provide wholistic transformative learning environments for such sacred exploration as the spiritual life of learners. I suggest that adult educators strive to "teach the whole person as a human soul which includes mind, body, emotions, and spirit" (Orr, 2005, p. 87), creating learning environments for transformational thought and action through the experience of the Divine within and the development of a spiritually guided life.

According to Bruce Speck (2005), spirituality can be defined as either emerging from a worldview whereby "all that exists is the natural world," or from a worldview that posits "both a natural and a supernatural world" (p. 9). In the natural worldview,

> spirituality must be defined in terms of the natural order. According to this worldview, no supernatural order exists, and therefore the natural order is a closed system. . . . Who or what is in charge can be answered only by referring to "natural" forces, whether Nature or humans or a combination of both. [In the supernatural worldview] the supernatural realm is ontologically primary. Thus, the natural realm exists because it is derived from and sustained by the supernatural realm. . . . This does not mean that people do not have authority of various sorts, but their authority is derivative, and they are accountable to the supernatural realm. (pp. 9-10)

The supernatural worldview proposed by Speck (2005) is inclusive of the natural world and therefore constitutes a more integral worldview of spirituality. Consequently, the spirituality I practice and am proposing here is, according to Speck's distinction, grounded in a supernatural worldview, whereby we humans are a manifestation and an extension of the supernatural order.

I want to address the word *supernatural* because it can be understood in different ways. I suggest that the concept of the supernatural can be explained either as phenomenon that science has not yet been able to explain or as the mystery in our universe that can never be fully explained. The fact is that often "we know more than we can tell" and have experiences we are unable to explain, and yet we feel deeply that they hold great value (Polanyi, 1967, p. 4). This is what Polanyi called "tacit knowing." In addition, Ken Wilbur suggests the measurement tool for spiritual experience is subjective perception rather than objective sensory observation. Consequently, I understand the supernatural to hold both perspectives: that which is not yet explained, and that which will remain a mystery.

This supernatural order is what Malcom Hollick (2006) calls "unfathomable mystery," which is at the heart of existence (p. 325). This unfathomable mystery has many names, such as Spirit, the Great Spirit, the Source, the Light, God, Goddess, the Divine, the Infinite, Higher Power, Cosmic Energy, the implicate order, the ground of being, and many more. Whatever the name used, "the core remains the same. There is a mysterious something, which can turn itself into something else. What is this Potential and where does it come from? We cannot know. It just IS [emphasis in original] (p. 326). I use different names to describe this "hidden intelligence of the universe" depending on the context and the phenomenon asking to be expressed, in order to avoid limiting the expression of this unfathomable experience to only one name and the specific spiritual practice and cultural context from which it emerged.

Education Towards Wholeness:
A Proposed Model for Developing Spiritual Knowing in Adult Learners

Through my personal spiritual practice, my work with others, and my doctoral research, I have come to know and understand spirituality as sacred moments in everyday life. Such moments may consist of a sense of peace and wholeness triggered by a walk in Nature, the scent of fresh herbs or the earth after the rain; being washed with love and warmth from the look or touch of a child, or being nurtured by someone; a feeling of gratitude while cooking a wholesome meal for myself or others; or experiencing elation during creative expression. During such moments I experience a sense of internal expansion of my being. Such moments of expansion are usually accompanied by a shift in sensations, feelings, and thoughts.

Following such moments of expansion, there is often some form of meaning making that may be general and relate to the human condition and my role or place as part of Nature; or it may be very specific, where I am provided with a practical, inspiring solution to an issue with which I have been grappling. These insights, or so called inspirational messages, can help me change my general attitude towards a specific situation, as well as provide me with a solution that I now can willingly choose to act upon.

Thus, by being the researcher of my own experience and that of others, I understand spiritual experience to be comprised of four ways of spiritual knowing, which I mentioned earlier and will now briefly describe, followed by a diagram that shows the process by which they can be experienced intentionally.

Four Ways of Spiritual Knowing

1. *Knowing Spirit* – This knowing can be defined as the understanding that Spirit, or some force greater than us exists and forms the universe, while informing and communicating with Nature and us. The function of this type of spiritual knowing is to provide a platform for actively and consciously seeking to connect and communicate with God or Spirit. This type of knowing forms the basis for developing spiritual knowing and sets the ground for the next type of knowing—identifying a spiritual state. In addition, as the connection to Spirit is developed and strengthened, so the knowing of Spirit's existence becomes more established, providing the ground for further development of the capacity for spiritual knowing. . . .

2. *Identifying a Spiritual State* – Recognizing that one is in a spiritual state can be defined as having the ability to identify the conditions that evoke an expanded state of consciousness, as well as the ability to recognize sensations, feelings, and thoughts that are associated with such an expanded state of being. These may include an opening up of all the senses, a heightened experience of feelings such as joy, love, and wholeness, a profound sense of the sacred at a particular moment, and a quiet peaceful recognition of the presence of Spirit. The ability to become aware of these shifts in our sensations, feelings, and thoughts allows us to experience the qualities of an expanded state of consciousness and opens up and prepares the ground for possible guidance or insight. The more we are able to identify an expanded state of consciousness, the easier it becomes to access and shift into such a state as we find ways to intentionally recreate such moments of expansiveness. . . .

3. *Receiving Guidance* – Receiving guidance involves a sense of being guided, having an intuitive flash, or receiving a clear insight. These may appear seemingly out of nowhere, like a flash of lightning, or may emerge after having contemplated a specific issue for some time. It may be connected with a sensation and feeling of truth, purity, and wholeness, whether it is associated with a sense of excitement, delight, and inspiration, or a sense of peace or even sadness. It is a moment when everything makes sense and falls into place. Sometimes, after the expanded state of consciousness has shifted to a more logical, rational state of mind, the guidance may seem odd and out of place, and doubt may arise as to its truthfulness. In such cases, it may be necessary to recreate the expanded state of consciousness in order to reconnect with the wisdom of the guidance. The function of this type of spiritual experience is to inform life choices and decisions that lead to action. An increasing capacity for identifying inner guidance and distinguishing it from rational logical reasoning may help develop more informed, spiritually guided action in the world. In the cyclical flow of the four ways of spiritual knowing, guidance is enabled by an expanded state of consciousness, and in turn, informs action in the world. . . .

4. *Action Imbued With Spirit* – This fourth type of experiencing spiritual knowing is informed by inner guidance and involves taking action. The experience of acting from an inner spiritual knowing may feel either like "flowing with the elements" and a sense of "everything is going my way," or alternatively, a strong sense of inner conviction in spite of contrary, external, logical

reasoning. Spiritually guided action in the world may serve to create a better and more whole world where humanity fulfills its collective purpose and evolution. Results of actions that are based on inner guidance and intuition may reinforce the desire to continue developing a capacity for spiritual knowing, thus strengthening the first type of knowing—knowing Spirit—which in turn leads to additional cycles of the four ways of spiritual knowing. (Gatmon, 2012, pp. 211-213)

Figure 1. **Process of Consciously Developing Spiritual Knowing.**

Using the process shown in Figure 1 requires an intention to develop spiritual knowing and a conscious choice to engage with the four ways of spiritual knowing in a sequential and cyclical manner. This implies that in order to develop a capacity for spiritual knowing, there needs to be a basic inner knowing of the existence of Spirit. Following this, a practice of developing awareness can help develop a capacity for expanding consciousness, which in turn can allow for insight and guidance, which would then require a conscious choice to act upon the guidance, thus completing a cycle. Each completed cycle forms the basis for the next cycle, strengthening the inner knowing that Spirit exists, followed by additional cycles of spiritual knowing.

Action in the world that is imbued with the qualities of Spirit and is in service of the greater whole is the ultimate purpose of developing spiritual knowing and leading a spiritually guided life. Developing our capacity for spiritual knowing could support us in becoming better-tuned instruments in service of the whole. This does not mean negating the self, but rather expanding our authentic self in order to do good in the world. Nor does it imply that every person needs to pursue a grandiose life. Instead, what it means is that through a collaborative communicative relationship with Spirit, we each find our role, or multiple roles in life, and manifest our calling to the best of our ability, whether this is grand and touches many, or whether private and supports seemingly few.

Practicing

I offer a short exercise that demonstrates an easy and accessible way to develop the capacity to recognize and identify when one enters into a spiritual state.

We are all familiar with the power of scent when we walk through an herb garden and smell different plants. I invite you to experiment and pick two or three fresh herbs such as parsley, mint, thyme, or lemon verbena and, one-by-one, crush the leaves between your fingers and take in the scent with your eyes closed. Take deep breaths and inhale the fragrance, letting their molecules infuse your being. Note any shifts in your body, any feeling or thought that arises. Keep it simple. Focus on the shift in the quality of your sensations, feelings, and thoughts. Whether you feel a sense of grounding, excitement, sheer happiness, or some sadness that may have been stuck inside you, this simple act of taking in the scent of herbs allows your consciousness to expand. Allow yourself to sense what it feels like. You may want to note what sensations, thoughts, or feelings came up with each herb, and you may even become aware of some insight regarding a current life situation.

Know that you can recreate a meditative practice of expanding your consciousness by smelling specific herbs and reconnecting with the qualities they evoke in you.

The reason why this is such a simple yet powerful exercise is because the plant kingdom is attuned to, or one with, the spiritual realm. It does not have free will or the human reflective mind, both of which can create the experience of separateness from our own divinity and connection to Spirit. When we do something as simple as smelling a leaf from a freshly picked herb, we, too, connect to Spirit, as, literally, the molecules of the herb touch us and transform our state of mind and being with its spiritual qualities. Therefore, the more we spend time in Nature, the more we become aware of Nature's connection to the sacred, to wholeness. As a consequence, we begin to experience similar qualities. Thus, Nature is a powerful gateway to the spiritual realm and our divinity within.

Conclusion

While the above exercise focuses on developing the capacity to identify a spiritual state, there are different exercises that can provide the conditions for developing all four ways of spiritual knowing: knowing Spirit, identifying a spiritual state, receiving guidance, and action imbued with Spirit.

Smelling freshly picked herbs is one method of introducing Spirit into the classroom through the gateway of Nature. Such an exercise can alter the mood and feeling of the classroom and provide a more expanded entry into any lesson, whether academic or experiential. By noting shifts in sensations, feelings, and thoughts as a result of smelling herbs, adult learners can become the researchers of their own spiritual experiences. By bringing into the classroom a more expanded state of mind and being, conditions become favorable for transformational thought and action. As experiential activities provide embodied learning and a more wholistic understanding of course content, so too, exercises that develop spiritual capacities in adult learners provide conditions for transformative learning. In addition, these offer opportunities for addressing the spiritual life of adult learners and providing them with embodied spiritual experiences within an educational setting.

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Re-Imagining Learning - An Education Towards Wholeness

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Abstract

Based on my educational life experiences from childhood through graduate school, I developed an educational model grounded in a wholistic and relational worldview that I call "Education Towards Wholeness." I present here the underlying worldview and major aspects and components of this model. It is my belief that by including wholistic practices such as those contained in the model of Education Towards Wholeness in diverse adult educational settings, adult educators and learners can be supported in living whole lives that can contribute to the evolution of consciousness and to transformative action in the world that fosters sustainability and, thus, can serve our planet.

Keywords

Education, Wholeness, Holistic, Child, School, Alternative, Adult

Introduction

My childhood education was a model of how not to educate children. Academic life, both in elementary and high school, focused on what Howard Gardner (1983) calls linguistic intelligence and rational problem-solving intelligence. All subjects were approached as rational tasks to be mastered. Other modes of learning, such as firsthand experience, role play, the child's affective relationship to any given material, or individual learning styles, were not considered, probably because the school system did not know of their existence or of the significant role they play in the process of learning. These modes and activities were thought to be inconsequential and irrelevant to the "real" process of learning, which, at that time, was still defined as memorizing information and regurgitating it during regular exams.

Furthermore, my inner world, the family I grew up in, and specific problems and dynamics that I brought with me to school every day from home were never addressed, although they affected my capacity to concentrate, to learn, and to be present. The curriculum did include two hours of physical education every week, as well as an hour of art, music, or crafts. Sometimes these were fun, while at other times they included the same rote learning as in academic subjects.

My experience in graduate school was very different. Those years of studying as an adult provided a profoundly significant transformative learning experience, one that introduced me to embodied learning and wholistic practices and learning processes. The focus was not on learning by rote, but rather, on applying the theoretical material learned to my personal life and, eventually, to my professional life

As a mother, I chose to homeschool both my sons when I became dissatisfied with my older son's public schooling experience. Homeschooling gave me an opportunity to connect my personal and professional journey with that of mothering my children, once again applying the theoretical to my personal life experience. It also allowed for a more integrated relationship between existing fragmented parts of our culture, such as school, work and home, and created a lived embodied experience of wholeness in our family life.

When my son eventually expressed a desire for a more formal educational setting, I created a small, alternative school based on a wholistic educational model I had developed while home schooling. This model is based on my educational life experiences from childhood through graduate school, and was originally created as a wholistic framework for homeschooling my children. The model was refined through my professional experience with the staff, parents, and children of the elementary school I founded. As this model provides a map and framework for wholistic living and learning, it can be applied to different age groups and learning contexts: both academic and extra-curricular child educational environments, academic and professional adult educational settings, as well as personal development processes for wholistic living. Here I present the model adapted for adult learners in an academic educational setting. I begin with an overview of wholistic education in adult learning theory.

Wholistic and Transformative Adult Education

In order to create conditions for wholistic transformative learning, adult educators need to attempt to "nurture the development of the whole person" (Miller, 2005b, p. 2), providing an education that is grounded in wholistic theory and practice. Wholistic education may include one or both of the following: "learning some ordinary subject or skill by being involved as a whole person, and learning how to become a whole person" (Heron, 2006, p. 37). The former is about "educational development—using holistic methods to enhance the

learning and teaching of different disciplines. . . . [The latter] is about personal development" (p. 37). Both are essential.

Subsequently, a wholistic learning experience is "not just an intellectual journey, but one that engages our entire being" (Miller, 2005a, p. 236). Unfortunately, modern education often reflects the dominant culture, privileging mind over body (Merriam, Caffarella, & Baumgartner, 2007), generating a neglect of the soul (Moore, 2005), and making it challenging to include attention to feelings (Sloan, 2005). Expanding on Mezirow's (1991) foundational transformative learning theory, other leading adult educators have contributed to the growth of a wholistic approach to learning and offer a richer, more wholistic experience of transformative learning for adults. These include Clark's (2001) focus on creativity and somatic-embodied knowing; Hoggan, Simpson, and Stucky's (2009) attention to creative expression in transformative learning; Dirkx's (2001) focus on the role of feelings and imagination in learning; Moore's (2005) attention to the soul in adult education; and Tisdell's (2003) exploration of spirituality in higher education.

Building on the work of these theorists, the Education Toward Wholeness model proposes a learning environment conducive to wholistic transformative learning experiences and greater individual and collective wholeness that can help us re-imagine learning for a transforming world.

Education Towards Wholeness – A Model of Transformative Education
The prevalent belief system of the Western world is based on fragmentation rather than wholeness. Everything is perceived as separate and, as a consequence, fragmented into unrelated parts. Each situation is dealt with locally without awareness of the interdependence and wholeness of life. Without a sense of connection and relatedness, it is difficult to take personal and collective responsibility for the sustainability of humanity and the planet. In contrast, the worldview on which the pedagogic model of Education Towards Wholeness is founded is a relational-wholistic worldview based on simultaneous awareness of the whole and its parts, while acting within the constant tension between the two. The name Education Towards Wholeness indicates the underlying belief that we are born whole and are always whole throughout our life; and yet, I believe the purpose of life is continually to express more aspects of our potential towards greater wholeness (Gatmon, 2012, p. 14). Again, holding the tension between seeming contradictions is imperative: on the one hand, there is our innate wholeness at any given moment, and on the other hand, there is our capacity to experience and express greater wholeness through an intentional process of personal and collective development.

Education Towards Wholeness views a person as part of a tapestry of relations within which the person lives: family, friends, community, culture, and environment. Consequently, a process of whole learning is necessary; it is based on inter-disciplinary content, using various modes of learning, and examining underlying values, beliefs, and assumptions. The learner is perceived as an integrative whole; therefore, all dimensions – physical, emotional, intellectual, and spiritual – are addressed.

It is essentially a process-based model that involves cycles of creating intention for learning, followed by experience and action that are followed by reflection. Each reflection deepens both previous and future experiences, and each action provides a lived experience to reflect upon and from which to create future intentions. This model invites constant introspection as well as learner-educator and group dialogue. Such a wholistic approach to living and learning honors the learner as a whole, providing a relational approach to teaching and a wholistic perspective of the world.

The Educational Model
Three essential aspects of a person's learning experience comprise this model and are represented in Figure 1 as intertwining circles: (a) person in web of relationships, (b) whole person learning, and (c) dimensions of a whole person. While the aspects are presented as three separate entities, they are, in fact, interrelated and overlapping. I offer a brief description of each one.
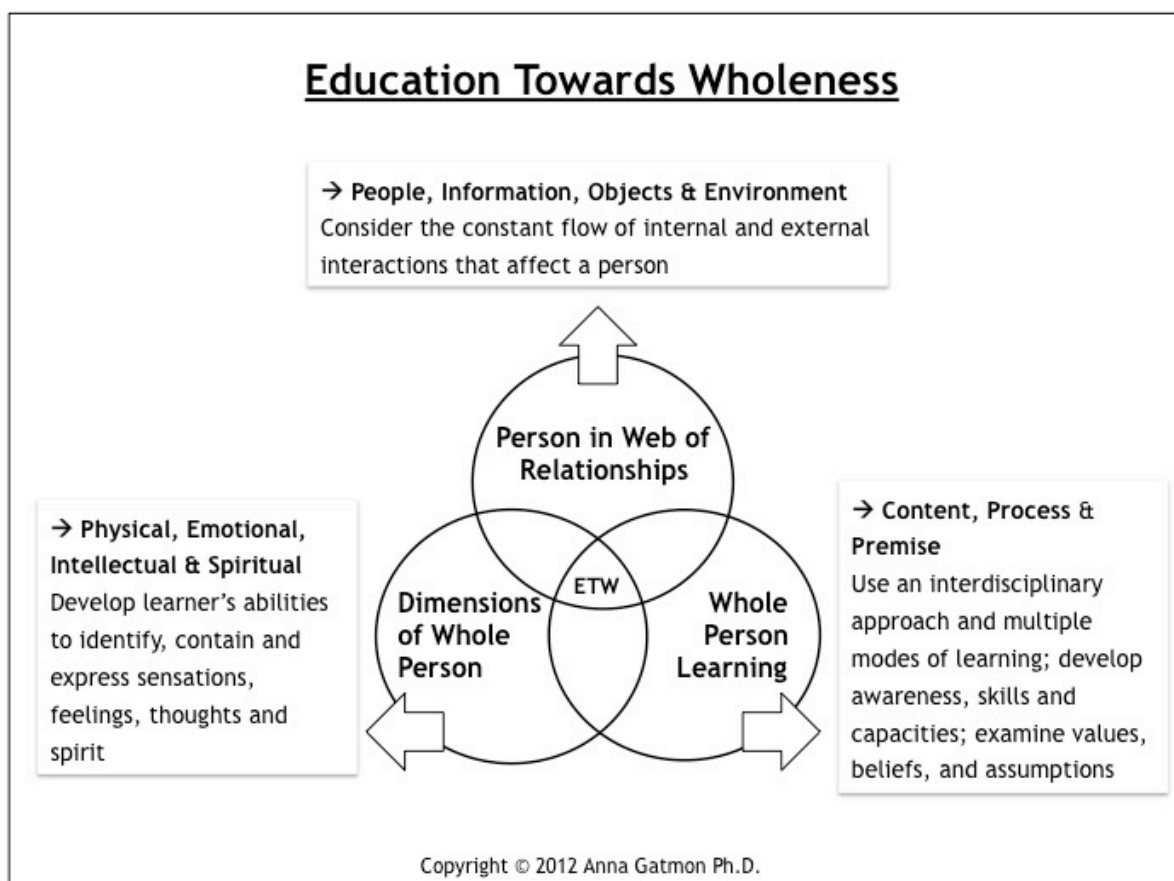
Figure 1: Overview of Model Education Towards Wholeness

Person in Web of Relationships – This aspect focuses on the intricate weave of relationships within which the learner interacts: relations with family, friends, and community; relations with the immediate and global environment; as well as exchange of information and various objects with which the learner comes into contact. Leaners' gender, race, ethnicity, socio-economic situation, etc. accompany them in any educational setting and influence their learning experience. Likewise, their current relationships, news of the day, and their mental and emotional states are part of their presence. In fact, everything they interact with enters the room with them. All this is fertile ground in addressing the content of any learning, whether academic or experiential, and if ignored, the richness and wholeness of the learner is not honored. This can be done through individual journaling and group reflection, inviting learners to acknowledge all aspects of their being. A safe and well-facilitated container is necessary for such educational practices.

Whole Person Learning – On a content level, whole person learning is acquired through the study of inter-disciplinary subjects. This requires showing the interrelatedness between seemingly separate topics and approaching subjects from different perspectives. On a process level, it demands creating educational processes that develop awareness, skills, and capacities within the learner, and demands that educators be open to applying multiple modes of learning, both academic and experiential. On a premise level, whole person learning necessitates the exploration of values, beliefs, and assumptions that deepen self-knowledge and provide opportunities for transformative learning experiences. When using this model as a guiding map, it is up to individual educators and learners to decide what will best suit the current situation, i.e., what will be the best approach to specific content, processes, and examination of premises that create a whole person learning experience.

Dimensions of Whole Person – People are multidimensional and multifaceted; however, the four primary dimensions in this model are physical, emotional, intellectual, and spiritual. It is essential to address each one of these dimensions and help learners develop their abilities to identify, contain, and express their sensations, feelings, thoughts, and spirit. On the physical dimension, it is important to develop an ability to listen to one's body and develop one's intuition. Including the emotional dimension in the learning environment can help learners develop their abilities to deal with their feelings and channel them effectively so as to experience learning more deeply. The intellectual dimension includes the capacity to reflect, and thus can help

learners create meaning from experiences and learn from them, refining the ability to apply the new learning to future experiences. The spiritual dimension can provide meaning and purpose in the lives of adult learners, connecting them to their inner divinity and the sacredness of life. I believe it is important to include these four dimensions in any adult educational setting and in the study of any subject matter because they are always present in the learners and can be expressed in any educational context.

Practicing

The model of Education Towards Wholeness is a process-based model that needs to be experienced and developed over time within an educational setting. However, here I am limited to a short exercise that focuses on the spiritual dimension of adult learning. The exercise can be done in a staff meeting, a classroom, or any other educational or professional setting. The focus is on bringing more Spirit and sacredness into the specific context or setting of which you are a part. It consists of an individual and group reflection based on a few questions that can evoke thoughts, feelings, and sensations in participants. To begin, create a comfortable quite space for the group to sit. Prepare pens and notepads for each participant. Let participants know what the focus is and let them know they will be reflecting individually on a few questions, followed by a group reflection or dialogue. Once you have set the expectation, invite participants to close their eyes and settle into their bodies, paying attention to their breath and letting go of any tension in their body, such as their neck or jaw. Invite participants to focus on one question at a time, giving them time to meditate quietly on each question and then allowing them to open their eyes and take notes.

You can choose any or all of the following questions depending on how much time you have for the exercise. The individual mediation on each question, followed by journaling, usually takes about 20-30 minutes.

1. What ritual practice from my personal spiritual practice would I like to include in this setting and add to a sense of wholeness for myself and maybe others as well?

2. What customs related to the specific educational setting could bring a sense of sacredness to this setting, such as a way to start each session, a way to set up the room, or an activity that can create a sense of community?

3. What do I like about this educational context?

4. What activities are my favorite and in what way?

5. What strength and beauty does this educational context bring out in me? Or, what strength and beauty would I like this educational context to bring out in me?

6. What do I like most about spending time in nature, and how can I bring some of that into this setting?

After reading a question, suggest that participants sit quietly for a few moments and allow the question to resonate within their minds and hearts. You can then invite participants to open their eyes and journal for a few minutes before closing their eyes again and listening to the next question. Repeat the process by asking each question, allowing time for it to resonate and time to journal. After asking some of these questions, you can also choose a question that speaks to fears or judgments that participants may have regarding bringing more Spirit and sacredness into this specific context, such as:

1. Can you identify if there is anything that would stop you from bringing more sacredness in to this setting?

2. What do you imagine would happen if you shared more of your soul in this setting? (This could be either something empowering and positive, or something threatening and negative).

3. How do you imagine others in the group would respond to your suggestions?

If you wish, you can have participants spend a set number of minutes in pairs relating their experiences and whatever they are comfortable with sharing from their notes, followed by a group reflection. It is, of course, important to respect the privacy of participants as they are sharing their creativity, their intuition, and their souls with the group. The group or the educator can decide how to proceed with the information shared and how to eventually implement suggestions. Such a creative and soulful process can provide an opportunity to build intimacy within a group, as well as offer practical suggestions for bringing more Spirit and sacredness into the

specific context or setting of which you are a part. This process focuses on creating intention. It is, therefore, recommended that some action or implementation be taken in order to provide a full cycle of learning – from creating intention, to action, to reflection. The more educators and learners engage in such cycles of learning, the more fully they can participate in their own learning.

Conclusion

The model of Education Towards Wholeness presented above offers a guiding map to wholistic adult education and to potentially transformative learning environments. As this model is process based, it needs to be implemented and experimented with over time, as well as customized to different educational contexts. Through the input and engagement of adult educators and adult learners, a relationship can develop in which the model serves as a guiding map, and educators and learners can bring the model to life through an individual and collective process.

I believe that a wholistic approach to living and learning is an essential part in developing our consciousness and living a sustainable life on our planet. By including wholistic practices such as the model of Education Towards Wholeness in diverse adult educational settings, adult educators and learners are supported in living whole lives that can contribute to the evolution of consciousness and to transformative action in the world that encourages sustainability and can serve our planet.

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Exercising Critical Reflection: Measuring The Relationship Between Brain Derived Neurotrophic Factor and Transformative Learning Experiences

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Abstract

Exercise boosts brain power, according to neuroscience research. And brain power is responsible for constructing increasingly accurate perspectives through critical reflection on disorienting trigger events. This study analyzes the relationship between exercise and transformative learning among undergraduates, as measured by a learning experiences questionnaire informed by emerging insights into education neuroscience. This project synthesizes findings from brain research (Begley, 2008; Doidge, 2007; Dragansky, 2004; Fisher & Heikkinen, 2010; Medina, 2008; Ratey, 2008, Restak, 2007; Siegel, 2010; Sousa, 2010; Zull, 2011) and transformative learning research (Herbers, 1998; King, 1997; Mezirow, 1978; Mezirow, 2000; Mezirow and Taylor, 2009; Taylor, 2000; Taylor, 2011).

Exercising Academic Excellence

Five years ago, I sat captivated as Harvard's Ratey (2008) told a room full of teachers the story of a wily Midwestern physical educator who leveraged an uncommonly effective source of boosting his students' brain power.

As Ratey told it, the teacher invited students to meet up before school and run laps around their school's track. After completing their laps, these students hit the locker room and then carried on with their normal school days. But their teacher, who tracked the academic performance of this daring dozen, discovered that these volunteers showed evidence of academically outperforming their classmates. School data documented that the volunteers' reading comprehension scores improved at nearly double the value of their peers.

When the teacher's school district learned of the success of this action research, it decided to offer before-school (or zero-hour) exercise opportunities for all 19,000 of its students. Thereafter, the eighth grade class produced math and science test scores that soared to first in the world in science and sixth in the world in math (compared to their sedentary American peers who scored 19th and 20th respectively in international tests of Science and Mathematics)—as measured by the Trends in International Mathematics and Science Study (TIMSS) exam (Ratey, 2008).

Ratey explained that exercise generated a protein called brain derived neurotrophic factor (BDNF) that he likened to Miracle Grow for exercisers' brains. And upon hearing this, my own oft-foggy brain concurred that its clearest thinking was generally accomplished during or after exercise—provided that my iPod remained in the off position.

BDNF Fertilizes Front-Brain Function

How does exercise boost brain power? It does so by generating and distributing BDNF from the brain stem to the pre-frontal cortex. BDNF enriches existing neurons and generates new neurons through processes known as neuroplasticity and neurogenesis in the front brain. These enriched and increased neurons then construct more numerous, varied, and robust neuronal pathways by which critical thinking may be initiated and sustained.

Further research indicates that BDNF production is one of many reasons to exercise in support of academic excellence. For example, Begley (2008), Doidge (2007), Dragansky (2004), Fisher & Heikkinen (2010), Medina (2008), Restak (2007), Siegel (2010), Sousa (2011), and Sylwester (2005) concurred that not only does exercise increase BDNF, but it also has been demonstrated to prompt dramatic increases in neurotransmitters such as serotonin—which modulates impulses and directs calm decision making—but exercise also delivers key supplies of blood and oxygen, which enrich existing neurons, construct new synaptic pathways, and create brand new neurons that Zull (2011) described as the physical embodiment of thought.

Exercising Critical Reflection?

When I returned to campus from listening to Ratey at the Mind, Brain and Education conference at Harvard, I put this research in the hands of my educational psychology students. After reading Ratey (2008), Medina (2008), Restak (2007), and related neuroscientific studies, my students and I concluded that exercising for academic excellence seemed like a smart start for rethinking data-driven 21st century pedagogy and andragogy.

Invigorated by collective discovery with my students, the researcher in me entertained a bundle of related research questions. But the one that felt most synergetic was the question of whether exercise-induced BDNF might perhaps promote transformative learning experiences among college students—as demonstrating academic excellence and exploring perspective transformation both required substantial executive function in the brain's prefrontal cortex.

As a researcher, I was also interested in engaging Taylor's (2000, 2009) encouragements for researchers to study transformative learning experiences through quantitative research designs. So I reviewed the existing literature on measuring TLEs in light of emerging lessons from education neuroscience research.

Measuring Perceptions of Critical Reflection

Intrigued by these opportunities, I began drafting and sharing iterations of such a questionnaire in with Dr. Mezirow. These iterations were based upon the transformative learning research of Brookfield, (2000), Herbers (1998), King (1997); Mezirow (1978), Mezirow (2000), Mezirow & Taylor (2009) as well as on the education neuroscientific learning cycle work of Begley (2008), Doidge (2007), Immordino-Yang & Faeth (2010), Medina (2008), Posner (2010), Ratey (2008), Sousa (2010), Sousa (2011), Sylwester (2005), Willis (2010) Zull (2002), and Zull (2011).

Mezirow's encouragement was equal measures of thrilling and invaluable in terms of support to explore new lenses through which to study transformative learning. Furthermore the work of Brookfield, (2000), Herbers (1998), King (1997) Mezirow (1978), Mezirow (2000), Mezirow and Taylor (2009), Taylor (2000) and Taylor (2011) were essential in informing my own better understanding and operationalizing transformative learning experiences into questions and categories for analysis. Thanks to their exhaustive research, I have been able to develop a learning experiences questionnaire into four unifying experiences common among rational analyses of TLEs. The first is the sensory cortex-based trigger event. The second is temporal region-based reflective observation. The third is the prefrontal cortex's critical analysis—and rational rejection—of assumptions often operating below conscious awareness. The fourth is the motor region's work of engaging in committed action.

Additionally, Zull's (2002, 2011) biological, pedagogical, and andragogical analysis of brain function— especially in relationship to Kolb's (1984) existing learning cycle research have suggested extensive integration between the stages, biochemistry, and sequencing of transformative learning theory's rational tenets within sensory, reflective, analytical, and motor regions in the brain.

Finally, the education neuroscientific research insights proceeding from the work of Begley (2008), Doidge (2007), Immordino-Yang & Faeth (2010), Medina (2008), Posner (2010), Ratey (2008), Sousa (2010), Sousa (2011), Sylwester (2005), and Willis (2010) have enabled increasingly concrete understanding of the neuroscientific function within and between key brain structures.

The synthesis of these bodies of scholarship have shaped the my current understanding of this learning experiences questionnaire in its present form and function toward measuring transformative learning experiences. Early blueprints of this questionnaire appeared in my own work (Glisczinski, 2011; Glisczinski, 2010).

Asking Questions

The research question that drives this study has two dimensions: what, if anything, happens to college students' (a) academic performance, and (b) perceptions of transformative learning experience when they increase their weekly minutes of aerobic exercise? This specific article focuses on the question of whether exercising improves people's experiences with the critically reflective dimensions of perspective transformation.

Measuring Moving Reflection

After receiving permission from my university to study students' academic and potentially transformative learning experiences, a colleague advised me to invite her students to participate in the study. Twenty one college seniors at my university volunteered to serve as this study's sample. Each was studying to become a licensed classroom teacher, with a median age of 23 years old.

All participants agreed to do the following three things: (1) record their minutes of exercise each week throughout the six week study through participant pseudonyms in password protected, encrypted, secure exercise tracking software; (2) report their course grade for an assessment course common to all participants at the conclusion of the study; and (3) complete a learning experiences questionnaire at the culmination of week six.

Volunteers were randomly assigned to control and experimental groups, so participants did not have the opportunity to self-select into a control or experimental level of exercise. At the outset of the study, 10 control group members were assigned to carry on with their normal amount of weekly exercise. Eleven experimental group participants were assigned to increase their weekly exercise by 30 minutes three days each week at heart rate zone three.

Figures 1 and 2 share learning experiences questionnaire items that all participants responded to at the conclusion of the study.

Drafting And Revising A Questionnaire

In the figures that follow, learning experience questionnaire items one through four are organized around specific brain regions and what appear to be their associated transformative learning experiences: (1) first, the sensory regions of the human brain appear to receive and manage events that may trigger cognitive dissonance; (2) secondly, the temporal region of the brain appears to interpret sensory stimuli through reflective observation; (3) next, the brain's prefrontal cortex appears to be the site of critical analysis—and rational rejection—of formerly-tacit assumptions that contribute to erroneous logic; (4) fourth is the motor region's applied work of experimenting with committed, informed action.

Figure 1. Learning Experiences Questions 1-3

Learning Experiences Questionnaire

1a. As a college student, I found myself questioning and then rejecting some of my former views or attitudes, values, or beliefs

- ☐ yes (please continue to the next question)
- ☐ no (please proceed to question 5a)

1b. I trace my awareness of this questioning and rejecting back to (please check all that apply)

- ☐ coursework
- ☐ campus life
- ☐ life beyond campus

1c. As I recall it, I came to question my views as a result of (please check all that apply)

- ☐ sight(s)
- ☐ sound(s)
- ☐ touch(es)
- ☐ taste(s)
- ☐ smell(s)
- ☐ smell(s)
- ☐ other

1d. An example of one such experience includes (please briefly describe below)

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

2a. Upon reflection, I recognize that I responded to this experience by (please check all that apply)

- ☐ fighting it
- ☐ taking flight from it
- ☐ enduring it
- ☐ engaging it
- ☐ other (please describe below)

_____
_____
_____
_____
_____

3a. As a result of this experience, I decided to analyze the merits of alternative attitudes, values, or beliefs

- ☐ yes (please continue to the next question)
- ☐ no (please proceed to question 5a)

3b. My analysis led me to realize that certain attitudes, values, and beliefs I'd formerly had were inaccurate and in need of revision

- ☐ yes (please continue to the next question)
- ☐ no (please proceed to question 5a)

3c. In order to construct more accurate thoughts and perspectives, I dialogued with (please check all that apply)

- ☐ my own reflective self
- ☐ more experienced others
- ☐ similarly experienced others
- ☐ less experienced others
- ☐ other (please describe below)

_____
_____
_____

Questions? Please contact dglisczi@d.umn.edu. Thanks.

Figure 2. Learning Experiences Questions 4-5

Learning Experiences Questionnaire

4a. In addition to more accurate attitudes, values, and beliefs, I began trying to translate these into more informed behaviors or actions

☐ yes (please continue to the next question)
☐ no (please proceed to question 5a)

4b. My more informed behaviors or actions took the form of (please check all that apply)

☐ words spoken privately
☐ words spoken publicly
☐ deeds done in privates
☐ deeds done in public
☐ other

4c. Examples of my more informed actions include (please briefly describe below)

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

5a. As a college student, I generally tended to involve myself with people and activities that (please check all that apply)

☐ affirmed my existing views
☐ challenged my existing views
☐ avoided such examination of views
☐ other (please explain)

_____
_____
_____
_____
_____
_____
_____
_____

5b. My academic major is/was

_____

5c. My academic minor or licensure is/was

_____

5d. I participated in the *Exercising Academic Excellence* study's

☐ control group
☐ experimental group

5e. I'm submitting these responses

☐ before participating in the study
☐ after participating in the study

5f. My study pseudonym is/was

_____

5g. May the researcher contact you to discuss the information you've shared?

☐ yes; (here is how I prefer to be contacted)
_____
☐ no

Thanks for your responses.
Please return this survey
to your survey administrator.

Questions? Please contact dglisczi@d.umn.edu. Thanks.

Findings And Discussion

At the time of this submission, this study was still in progress. Findings and discussion will be forthcoming at the conclusion of the study.

Working Conclusion

Five years ago, I sat captivated as Ratey (2008) told a room full of teachers the story of a wily Midwestern physical educator who leveraged an exercise as an uncommonly effective source of boosting his students' brain power. Today I look forward to five years from now when we as transformative learning theory researchers have the resources and the expertise to comparatively study—through magnetic resonance imaging or related instrumentation—the similarities and differences between sedentary brains and exercising brains as they respond to dissonant stimuli. I'll be fascinated to learn more about the relationship between exercising, BDNF, and critical reflection. For now, my best understanding is that TLEs sequentially engage sensory, temporal, prefrontal, and motor region brain work. For now, I'll continue to study the role that BDNF may have in triggering cognitive dissonance to reach fruition in experiences of perspective transformation.

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The High Road To Mindful Transformation: How Emotionally Competent Stimuli Engage Prefrontal Cortex Rationality

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Abstract

Why do some dissonance-inducing experiences promote perspective transformation while others merely incite ideological non-transformative entrenchment? Education neuroscience research suggests transformative learning experiences travel the brain's high road—fueled by emotionally competent stimuli that engage the rational prefrontal cortex where critical reflection on assumption takes place. Conversely, those experiences that incite ideological entrenchment appear to be channeled by the reticular activating system to the brain's low road, where the amygdala protects rather than probes assumptions through freeze, fight, and flight responses. These findings are shared in a spirit of inquiry and offered as considerations for scaffolding emotionally competent, mindful transformation of teaching and learning.

Amending Constitutions

In late 2012, Minnesotans headed to the polls to vote on a proposed constitutional amendment designed to deny equal marriage rights to all citizens. As November approached, billboards, bus stops, and bumper stickers grew colorful with conflicting points of view.

During that time, two Catholic Minnesotan couples summarized their opposing views on the issue before heading to the polls. The first took place in a television commercial wherein the couple described discovering new perspectives after developing a relationship that led them to question their own longstanding assumptions. The second was communicated in a personal conversation in which this couple described the proposed amendment as a loser of an issue that they reasoned merited no little or no involvement. In other words, the first set of voters described being moved to amend their own individual constitutions, while the second set of voters appeared not to oppose amending their entire state's constitution around culturally conservative values.

The purpose of this paper is to comparatively examine transformative and non-transformative learning experiences in light of research findings from the field of education neuroscience. This discussion is offered in support of better understanding and scaffolding of such learning.

Triggering Productive Dissonance

So then, why do certain dissonance-inducing experiences trigger critical reflection and transformed action while other dissonant experiences merely incite ideological entrenchment?

Neuroscience suggest that sensory stimuli are first registered in the brain's sensory cortex (SC), after which they're identified as dissonant by the temporal cortex (TC), from which they're escorted and then critically analyzed in the prefrontal cortex (PFC) before being acted upon by the motor cortex (MC). This remarkable journey appears to require synaptic sojourning across the better part of the brain's 100 billion neurons worth of geography (Medina, 2008; Siegel, 2010; Zull, 2011)

Moreover, transformative learning events (TLEs) appear to require an alta vista—or a high view—of formerly habituated or taken-for-granted human interactions and cultural landscapes. From a physiological frame of reference, such elevated views or perspectives seem to transpire in the brain's rational PFC—a critical thinking region located at the opposite side of the human brain from portals of sensory perception. Perhaps geographical vastness in part helps to explain why so few disorienting stimuli find sufficient stores of fuel to successfully traverse the brain's networks of neuronal latitude that connect sensory impressions with critical reflection.

Fueling Critical Reflection

What then, appears to supply TLEs with sufficient fuel to span the adult brain's vast geography and navigate its densely reinforced neuronal networks—often tangled toward ideological entrenchment—in pursuit of the TLE?

Neuroscience suggests an unlikely protagonist: emotionally competent stimuli (ECS) appear to drive cognition along the brain's high road from the SC through the TC to the PFC.

Specifically, a substantial body of research points to emotion as a critical catalyst to rational processing within the human brain (Begley, 2008; Brooks, 2011; Doidge, 2007; Gardner, 2004; Goleman, 2006; Heath, Immordino-Yang & Faeth, 2010; Medina, 2008; Siegel, 2010; Sousa, 2010; Willis, 2010; Zull, 2011). Described as the "most powerful external stimuli ever measured" (Medina, 2008, p. 13), ECS appear to invigorate and sustain the brain's preferential treatment of sensory stimuli from points of reception, to association, to analysis, to critical reflection.

In the narratives and analyses that follow, a brief case study describing the perspectives expressed by two pairs of Minnesota voters is offered to help clarify the powerful relationship between ECS and TLEs.

Feeling The Need To Take A Second Look

Kim and John's television commercial in which they described a personalized case for voting against Minnesota's proposed constitutional amendment to restrict marriage to one man plus one woman serves as a mainstream media example of perspective transformation. Filmed in their home's suburban living room, Kim and John identified as Catholics, Republicans, parents of three, and a couple married for over thirteen years.

John looked into the television camera and exclaimed, "Marriage is really important to me. I didn't really think a lot about same-sex marriage until we had a gay couple live in our neighborhood."

The camera cut to Kim. She explained, "They had adopted a little son, and they were the most wonderful neighbors. They taught all of us in our little suburban world," as video footage showed the neighborhood's lesbian and heterosexual families gathered in Kim and John's home.

"We did have some good discussions," observed John, "and in our daughter's world, her normal is so much different than ours. It didn't faze her at all," while captured his family preparing dinner together.

"It's okay to take a second look," asserted Kim.

"And when you do, vote no," concluded John.

Then the commercial ended.

In the language of transformative learning theory, this brief commercial appeared to provide a trigger event that invited viewers to experience a discrepant event—or cognitive dissonance—as a self-described conservative, religious couple explained their situated rethinking of what it meant to be neighbors, family, and wonderful. Powerful messaging, some would say.

And still, that very same week, about a month before the November ballot, another, quite opposite conservative, Catholic, suburban scenario was playing itself out. In order to more effectively explain this contrasting scenario, a couple more brain research questions and answers follow.

How Much ECS Are Too Much?

If ECS fuel and sustain cognition, is there such a thing as experiencing too much emotion in sensory stimuli? If so, to what effect?

In determining whether there is such a thing as too much ECS, neuroscience suggests: absolutely. Flooding—or overwhelming—the human brain's sensory regions with a tsunami of emotional stimuli appears to alarm the brain into short circuiting rational thinking. Emotional flooding appears to alert the brain's reticular

activation system (RAS) and the brain's amygdala, which when threatened deactivate the PFC in favor of the amygdala's self-preserving fight, flight, or freeze responses.

Specifically, research points to hereditarily-important brain regions designed to protect homo sapiens from indulging in philosophical considerations in survival-based situations in which visceral responses may be more appropriate than critical reflection. Scientists suggest that such situations invoke primal responses aligned with natural selection, through which only the fittest have survived. When faced with threatening stimuli, the brain's RAS and amygdala appear to barricade the brain's rational high road to the PFC and the TLE in in favor of self-preservation. As a result, the RAS and the amygdala mobilize adrenaline which defends the equivalents of deficiency needs at the cost of self-actualization needs (Brooks, 2011; Medina, 2008; Restak, 2009; Sousa, 2011; Zull, 2011).s

A Little Is Not Enough

So, in contrast to overwhelming ECS, what become of emotionally equivocal or underwhelming stimuli?

Because neuroscience suggests that the human brain is perhaps the most complex organ ever studied, definitive answers may be deceptively simple. Yet after the securing the brain against threats the RAS also attends to opportunities for engaged learning. For this reason, equivocal—or non-compelling—stimuli seem to suffer from comparative disadvantage, or habituation, in the sense that the brain tends to ignore sensory impressions that suggest neither significant opportunity nor risk. Current research indicates that the brain dismisses equivocal sensory impressions after a period of approximately ten minutes (Medina, 2008; Zull, 2002). In terms of transformative learning opportunities, this suggests that emotionally compelling trigger events should be carefully scaffolded at regular intervals for productive adult learning. To better understand an example of equivocal stimuli, consider the second set of Minnesota voters in this brief case study.

Unmoved By a "Non-Issue"

As with Kim and John, Joseph and Anne are also suburban Catholics, also inclined to vote for Republicans. Returning home from their church which displays banners instructing that "Marriage = 1 man + 1 woman," they voice no objection to scripture readings, a gospel, and a sermon collectively crafted to reinforce the primacy of marriage as uniquely heterosexual. In this context, Joseph and Anne initiated the following conversation with their adult son, Joseph junior, who joined them for mass, at Anne's request.

"Is your son still cantoring at church these days?" Joseph senior asked of Joseph junior.

"Nope. . . We actually haven't been to mass for six months," admitted junior.

"Hmm. That's too bad," responded senior. "Why?"

"Well, because we're ashamed of the Catholic church's advocacy of the proposed ban on marriage equality," replied junior.

Silence ensued; then a pregnant pause of disequilibrium followed.

Senior questioned, "And so you're going to quit when you find something you don't agree with? Seems like the wrong message to your children."

More silent disequilibrium. And then the response.

"That's not it, dad. We've watched our church grow increasingly vehement in its homophobic messages in this election year. We've knelt and prayed for understanding. We've asked our pastor to pray for us and help us understand. We've attended our church's unconvincing theological seminars on the issue. We've had our pastor over to our home to break bread with us to engage in what we hoped would be discourse. And in the end, all our pastor did was inform us that our definition of sin was sinful."

"Well, that's too bad. You've got to be careful not to get caught up in non-issues like this one. You've got to choose your battles more carefully," admonished senior.

"In what way is this a non-issue, dad?" inquired Junior.

"It's a lose-lose battle. A non-issue. Let it go, and hang in there. This will pass. Set a good example for your kids."

"But, dad, I think we may be in fact be setting a good example for our kids. If we don't take a stand against institutional discrimination, especially within an institution in which we're invested, what then are we teaching them? Don't you recognize this as one culmination of a lifetime of what you and mom have taught us about acting on examined conscience—even when our conclusions are unpopular?"

Heads waged. Silence ensued. And then the conversation dissolved. All involved stepped back and away. For a time.

A Tale Of Two Brain Regions

Joseph, Anne, Kim, and John are two sets of Minnesotan Catholic voters who faced a ballot question that called for honest examination of conscience. One of these families voiced perspectives transformed by critical reflection on long-held assumptions that they came to view as inaccurate. The other family appeared unmoved by what it viewed as a losing issue.

So what appears to be the source of such differences? Why do some dissonance-inducing experiences result in transformation while others merely induce ideological entrenchment? To better understand these questions, a brief tour of the biological commonalities and functional differences among brains follows.

A Bit About The Average Brain

The average brain weighs in at three and a half pounds and contains more neurons than a dozen times Earth's population. Functional magnetic resonance imaging suggests these neurons are responsible for sensing, interpreting, analyzing, and acting upon sensory impressions. Generally speaking, the back regions of the brain receive sensory input. But because the world is big and the brain is comparatively small, the sensory region is a pretty busy place. For this reason, the sensory region tends to reserve its attention for the important issues—such as perceiving opportunities and threats. These favorable opportunities are associated with positivity in the brain's temporal regions, and then directed up the brain's high road to the PFC for critical reflection, which are intrinsically rewarded with dopamine reinforcements. Equivocal impressions are eventually habituated—or dismissed as inconsequential. Unfavorable threats, in contrast, get routed immediately south to defensive regions of the reptilian brain.

In short, ECS are ushered along the brain's high road to rewarding rationality. Equivocal stimuli sputter and are habituate. Threatening stimuli speed along the brain's low road to defensive management.

With this in mind, it seems probable that perspective transformations are produced along brain's high road of executive function. As follows, the opposite of transformation, akin to ideological entrenchment appears to travel the brain's low road of self preservation. Or, in other words, the robust cognition associated with TLEs appears to follow or forge pathways in the brain's high, mindful, comparatively analytical neuronal networks. In contrast, defensive reactions to threatening stimuli appear to be channeled along the brain's ancient, protective, comparatively reactive neuronal networks.

Summary: ECS To The PFC May Be The High Road To The TLE

Research indicates that trigger events which take the form of what neuroscience calls ECS appear to be processed first by the brain's sensory regions and are then channeled by the brain's RAS. ECS events tend to be better remembered than neutral events, as they engage the brain's first sensory intake filter, which is a primitive network of cells through which all sensory input must pass if it is to be received by the higher brain's PFC, according to Immordino-Yang & Faeth, (2010), Medina (2008), Posner (2010), Sousa (2010), Willis (2010), and Zull (2011). Reducing the perception of threat appears to be important because when overwhelmed by stress or fear, the RAS filter directs sensory stimuli and information to the lower, reactive brain rather than the higher, analytical brain, where critical reflection appears to take place. ECS events seem to be ushered into the reflective temporal region for meaning making and then onward into the analytical front brain—thus enabling what transformative learning scholars call critical reflection on assumptions.

Conversely, threatening sensory stimuli that incite ideological entrenchment or regression appear to be relegated to the brain's low road where they provoke the ire of the protective amygdala. The brain's amygdala are highly effective at defending individuals against threats, as when on red alert, they signals to the kidneys calling for adrenaline supplies to fortify fight and flight reactions. When this takes place, adrenaline floods the brain's frontal analytical regions and thereby temporarily arrests the perspective-taking power of the prefrontal cortex (Immordino-Yang & Faeth, 2010; Medina, 2008; Posner, 2010; Sousa, 2010; Willis, 2010; Zull, 2011).

Scaffolding ECS For TLEs

In light of these and related emerging neuroscientific findings, when applied to the case of Minnesotan voters faced with a proposed constitutional amendment, it appears that TLEs proceed from a mindful combination of ECS and critically reflective discourse. These observations are offered to assist those who interact with transformative intentions to better understand and navigate the brain's typical responses to cognitive dissonance, in order to advance transformative learning experiences guided by evolving understandings of the physiology of perspective transformation.

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An Exploration of the Perceptions of the Development of Clinical Judgment in Bachelor of Science Nursing Students Who Experienced Structured Reflective Practice in the Classroom

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Abstract

This presentation will examine the incorporation of "reflection-on-action" in a structured reflective classroom format as defined by the Model of Clinical Judgment (Tanner, 2006) on the development of perceived clinical judgment and clinical confidence in BSN students. The students' perceptions of the benefit of the intervention on their development of clinical judgment and clinical confidence will be discussed. This research is an important contribution to the debate regarding the benefit of structured reflection in a classroom setting. By utilizing reflection, nursing educators may impact the education-practice gap and incorporate new pedagogies to strengthen the educational preparedness of nursing students to provide high quality, competent, compassionate care to patients and their families.

Keywords

Structured Reflection, Theory-Practice Gap

The health care environment is constantly evolving with new technology and new challenges for nurse educators to prepare professional nurses. Nurse educators must incorporate the necessary knowledge and skills into a curriculum so students will enter practice prepared to assess and treat complex patient situations. The need to educate students and the challenges in the health care environment has lead to a theory-practice gap (Corlett, 2000). As nursing students in clinical settings enter a high-stakes experience, the theory-practice gap must be eliminated so that novice nurses can actively think, reflect and apply classroom knowledge to each clinical situation (Benner, Sutphen, Leonard & Day, 2010).

The theory-practice gap is conceptually defined as the discrepancy between the theoretical content that students are taught in the classroom and the inability to apply this knowledge to specific patient situations (Corlett, 2000). The development of clinical judgment and the use of reflective practice have been identified as key components in bridging the theory-practice gap (Johns, 2007, Ruth-Sahd, 2003, Tanner, 2006). A successful nursing curriculum needs to incorporate teaching-learning strategies to develop students' clinical knowledge, judgment and confidence. Reflective practice has been identified as a critical component in this process (Tanner, 2006).

The Clinical Judgment Model (Tanner, 2006) was developed as a framework to incorporate reflective practice to guide students through patient situations in an effort to expand knowledge, judgment and confidence. Tanner (2006) stated that reflecting on nursing students' actual patient experiences contributes to the development of clinical knowledge and clinical judgment in future clinical situations. Tanner (2006) believed that connecting the nurse's actions to outcomes occurred through reflection on every patient situation and by the incorporation of "reflect ion on action" into practice. "Reflection-on-action" allows the student's to reflect and discuss actual patient situations and through coaching provide feedback to students to shape their actions in the future. The major assumption of the model was that the development of a curriculum which advances student's knowledge through expert coaching and reflective techniques would enhance the development of clinical judgment, improve clinical confidence and narrow the theory-practice gap (Tanner, 2006).

Johns (2007) described reflection as being mindful of self within an experience which would empower the practitioner to respond more effective in future situations. Johns (2007) identified that students require guidance in the act of reflection. Benner et al. (2010) stated that classroom time should be utilized in an effort to teach nursing students what is important and unimportant in clinical situations and encourages an integration of classroom and clinical teaching. She added that a separation of clinical and classroom teaching does not integrate the knowledge and necessary skills which nursing students require. Benner et al. (2010) stated that nursing educators need to coach the nursing students to be able ti identify what is important about patient situations and develop their ability to

identify appropriate actions, develop clinical imagination and develop clinical reasoning. Therefore, the development of reflective teaching in nursing education is a critical component to the success of reflective practice.

Many qualitative studies have supported the use of reflection, but conflict continues related to a framework for implementation and the benefit to professional practice (Ruth-Sahd, 2003). This research implemented a "Structured Reflective Practice Guide" (Table 1) and students were encouraged to discuss patient encounters and clinical situations. The students discussed formal knowledge, pathophysiology, emotional and ethical issues related to the patient situation. The students were encouraged to discuss their first impressions, nursing interventions, outcomes, goals for the patient and family members and any conflicts which occurred. The class was encouraged to ask questions related to the patient situations. At the conclusion of the patient presentations, students were asked to "Reflect –on-
Action" and as a group discuss the nursing interventions, the outcomes and the implications for future patient care situations.

By utilizing a Structured Reflective Practice Guide, the students reported an improved ability to apply classroom knowledge to clinical experiences and that the reflective sessions impacted their application of theoretical knowledge to recent and future patient care experiences. The students reported that by hearing presentation of actual patient experiences from their peers, they were able to gain insight and apply other student's acquired knowledge to their own development of clinical judgment.

The structured discussion and application of knowledge to actual patient situations involved a "situated teaching" strategy. Benner et al. (2010) described situated teaching as the coaching of students regarding specific clinical situations to evaluate the actions which were taken in order to improve clinical reasoning skills. Developing a perceived safe environment for the student presentations provided the participants the opportunity to openly discuss their patient encounters which led to the development of a sense of salience during the clinical encounters.

The participants in structured reflective practice sessions reported a sense of reassurance related to their clinical experiences and an improved ability to communicate with the health care team due to the classroom presentations. The students also reported the realization of the depth of the science of nursing and through the discussion were able to recognize the necessary knowledge and the vastness of patient situations, conditions, treatments and outcomes.

Several unexpected instructional benefits of the structured reflective sessions occurred which may have important implications for nursing education. These benefits included (a) providing an opportunity to review the types of patients assigned to the students at the clinical setting, (b) providing an evaluation of the students' theoretical knowledge, (c) identifying current treatment options employed at the clinical facilities, and (d) providing the opportunity to assess the effectiveness of the education and application of nursing theory.

Through the inclusion of structured reflective sessions into a nursing curriculum, students have an opportunity to recognize, prioritize, and delineate important clinical situations and gain a sense of salience to potentially apply this knowledge to future patient care encounters. Through reflective sessions, the sharp separation of classroom and clinical teaching may be eliminated, and the students may develop improved clinical reasoning and the ability to integrate classroom and clinical knowledge. Therefore, nurse educators should consider the incorporation of structured reflective sessions throughout the nursing curriculum. Through new pedagogies which incorporate structured reflection of patient care situations in the classroom, nurse educators may narrow the theory- practice gap and improve the educational outcomes and preparedness of nursing students.

STRUCTURED REFLECTIVE PRACTICE

AT THE CLINICAL SITE	Structured Reflective Classroom Sessions
Background: Obtain the formal knowledge needed to care for the patient assignment (classroom lectures, readings, textbooks) Identify the relationship with the patient and family. Identify any emotional or ethical issues related to the care of the patient	**Presentations:** Student will present their patients (in accordance with HIPPA) to the group and will include the following information HPI CC PMH Family History/Social History Allergies Medications Diagnostic Studies Vital Signs Physical Examination Findings.
Noticing: What additional information was required to care for the patient and how was it obtained? Identify your first impression of the patient and family Identify any previous patient situations previously encountered and include similarities and differences in regards to the current situation **Interpreting:** What is your initial interpretation of the data and what priorities of care were identified?	**Reflection-on-Action and Clinical Learning:** Review and present the pathophysiology related to the patient situation Discuss the specific intervention in the patient care and the impact on the outcomes Discuss and review diagnostic studies, lab results, medication intervention Discuss evidence-based nursing care and the patient outcomes Describe what interventions you would do differently if faced with a similar situation in the future Describe emotional and ethical issues which occurred during the care of the patient
Responding: List the nursing interventions that were performed Identify your goals for the patient and family members Identify collaborative efforts and any conflicts	
Reflection-in-Action: Identify what happened during the clinical experience. Identify the patient and family response to the situation and document your immediate interventions	

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Phenomenological Aspects of Transformative Learning:
Edge Emotions and Liminality

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Abstract

Transformative learning points to a desirable destination that partially obscures the difficult journey required. Leaving the cocoon of one's founding premises, one finds oneself engaged in an existential challenge. The "edge emotions" of anxiety and depression are frequent concomitants. One finds oneself standing on the threshold between two existential planes. In order to arrive at the other plane one moves through a liminal zone, leaving behind the familiar but inadequate premises in order to forge new ones. The courage to complete such a journey is enhanced when one expects edge emotions. One can navigate these turbulent waters more confidently knowing the signposts this workshop will describe.

Introduction

The literature on Transformational Learning places a premium on reflective thinking as the means by which one re-establishes one's equilibrium after some disquieting triggering event. Reflective thinking involves stepping back from engagement with the world in order to identify the premises by which one interprets one's experience (Mezirow, 2000, p. 3; see also Mezirow 1991). Such reflective analysis is necessary to identify and discard limiting premises; thus making room for more adequate ones. While this is undoubtedly true, it is a concluding truth. As such it elides the daunting existential challenges that one faces on that quest. Berger (2004) points to what must be filled in in order to more fully understand the processes implicated in transformational change:

> Adult developmentalists believe that to begin a transformative journey is to give up an
> old perspective, to *actually lose a sense of the former world* before the new world is
> fully articulated. (p.3)

Perry (1968) brings this closer to home by pointing out that it is not only a loss of their former world but also a threat to their sense of self. That is, the person standing on the threshold of a transformative experience often doubts their "competence to take on new uncertainties". In addition, they often "wish to maintain a self one has felt oneself to be." (p. 52) Naturally they wish to conserve what has served them well up to this point. Perry's articulation is helpful in that he depicts a "constellation of countervailing forces" that are implicated in such life changing events. We find that his notion of countervailing forces more accurately describes the process as it names not only the initial triggering event, that disturbs the previously achieved equilibrium, but also names the impulse to conserve or preserve one's identity. As Mezirow (2000) has pointed out,

> A defining condition of being human is our urgent need to understand and order the meaning
> of our experience, to integrate it with what we know to avoid the threat of chaos. (p.3)

It is interesting to note that Barnes, the Booker Man prize winning novelist, states that novels make sense of people's lives and therefore are pleasurable…but they don't make sense of *my* life. That is, the novel makes sense of the protagonists' lives but they don't make sense of the reader's. Thus reading a novel vicariously satisfies our need for order and meaning. By so doing it speaks to the human hunger to make sense of one's circumstances; to the need for coherence and continuity. The countervailing forces that Perry names express a dynamic contestation between the need to develop a more adequate set of premises versus the need to preserve one's integrity. To successfully facilitate such changes, educators need to honor and address both.

This presentation will invite participants into a discussion whose purpose will be to fill in the gaps between the triggering event, the reflective process and the generative conclusion. We will begin by focusing on two aspects that arise during this process: edge emotions and liminal experiences. Edge emotions occur as one encounters experiences at the boundaries of one's comfort zone (Mälkki 2010). Anxiety and depression are the most frequent of these as one loses both the familiar sense of self and a taken for granted world. Liminality is another name for such a process. It refers to an "in-between" zone between two relatively defined developmental stages (Green 2012). As Berger (2004) so elegantly states

> My experience has shown me that the edge is the most precarious—and important—transformative space. It is in this liminal space that can come to terms with the limitations of our knowing and not knowing both difficult to understand—because they are constantly moving and being redefined—and also of central importance to our work as transformational educators. (p. 338)

With this statement Berger is introducing an idea that is often overlooked in the transformational change literature. That is the issue of boundary—in this case the boundary between knowing and not knowing. However, the boundary can also be expressed in the differentiation between what I conceive of as "me" and what I conceive of as "not me"—or the boundary between self and that which is other. Green (2012) refers to that boundary as the ur-boundary. Individuals undergoing a liminal experience are often not able to act rationally "because the structure on which 'objective' rationality was based has disappeared". (Szakolczai, 2009) This indicates that that there are times during the liminal experience when the individual no longer lives within their representational or conceptual framework but has rather been catapulted into an existential dilemma.

The experiential component

The experiential component will involve participants forming work teams of two that will discuss a recent undigested experience. By an undigested experience we are referring to experiences where, for some inexplicable reason, the outcome was not what the participant was intending. These experiences often can act as sites where the countervailing forces of change and conservation conflict with one another. Participants can locate and identify such incidents by the presence of milder, transient versions of edge emotions: frustration, disappointment or surprise. Participants will take turns reliving those experiences, alternating between the roles of facilitator and learner. We will emphasize conditions and guidelines that create an atmosphere of relative safety in order to insure that both the facilitator and the participant will learn their respective roles in undertaking such a process. We wish to create an atmosphere where participants will have the experience of being accompanied and supported on such a journey. This means respecting both countervailing motives. This will be followed by a large group debrief which will identify the patterns that recur during such an activity.

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Psychotherapeutic Praxis Distilled: From a Fragmented, to a Coherent, Reflexive Self.

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Abstract

The raison d'être of psychotherapy has been to create conditions that encourage transformational change. There are significant existential costs entailed in the process. Therefore, we will devote some time to addressing the resistances, anxiety and ambivalence that accompany transformative learning. The therapeutic process is animated by an attitude of respect toward the client as a potentially autonomous agent of change in his/her ways of being in the world. The process of change calls for both a capacity for immersion in the here and now, as well as empathic, reflexive detachment — the ability to interpret this moment in the context of the individual's personal history. Participants in the workshop will be invited to utilize their own experiences to "flesh out" the concepts being discussed.

Keywords

Psychotherapy, existential costs, anxiety, ambivalence, reflexive detachment

Introduction

Our intention for this presentation is to engage in reflexive dialogue about 'learning' and praxis in psychotherapeutic settings and then to consider what this has to offer to our understanding of transformational learning more broadly. We hold that psychotherapy's term, 'structural change', is largely equivalent to education's term, transformational learning. For each, the frame through which a person interprets their experience changes. (Mezirow, 1991, 2000) For example, the assumption that one's behavior is caused by some external agent can be replaced by a notion of personal responsibility[1]. In such a case the individual's frame of reference has undergone a radical shift. We understand "frame of reference" as a stable, trustworthy pattern of interpretative guidelines. The question, "what does my experience mean?", had been automatically or unconsciously referred to the frame of reference for interpretation. In the case of transformative learning, however, some event has called into question both the continuing reliability of this framework and one's habitual interpretations. The resultant change process, we suggest, is far from simply, rational, and cognitive.

In addition to the similarities shared by our theoretical terms, 'transformative learning' and 'structural change' there are significant differences as well. 'Structural change' is a noun and, as such conveys stasis; whereas 'learning' is a verb and, as such, points to an ongoing process. We hold that despite these differences in connotations, the processes to which both terms refer overlap to a considerable degree. We further hold that these terms point to different aspects of the same phenomenon and taken together give a more complete account. However, it is also the case that transformative learning has often, at least in dominant accounts, been taken to mean a largely conscious and or cognitive process, whereas we want to bring the whole experiencing person into the frame, including how difficult it can be, sometimes, to think new and challenging thoughts (Bainbridge and West, 2012; Merrill and West, 2009; West, 2012).

Praxis and Transformation

The domains from which our expertise has been drawn include both psychotherapy and adult education and therefore address both individual and group levels. We believe that understandings accrued during the one-to-one psychotherapeutic process can inform the pedagogy of the instructor in the classroom, as well as wider problems of resistance to change (Bainbridge and West, 2012). For example, for transformation to occur, we believe that the prereflective, or more primitive self has to be engaged. Necessarily the methods that promote such engagement will be different in the classroom than in the consulting office. Nevertheless, the objective is the same.

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[1] In technical language we are referring to a shift from an external to an internal locus of control. Rotter, J.B. (1990)

The presentation will make use of the notion of praxis to understand human experience; in particular, the interplay of absorption and detachment, self and other, conscious and unconscious dynamics, as well as the interplay of immediacy and memory. We want to unpack this rich, condensed statement. We consider a capacity for immersion in the here and now, in the other's story telling (as well as creating the conditions in which storytelling is possible), alternating with an empathic, reflexive detachment and auto/biographical sensibility to be crucial. That is to say that in allowing oneself to be absorbed by the client's narrative is to temporarily dwell within *their* ontology. That is, we cultivate the capacity to *be* with the client's experience. We join them where they live, metaphorically, and thereby engage their existential self. (Green, 2012). We consider this to be a vital preliminary without which transformational change will not occur. Transformation, in our account, is the reconfiguring of the self; a reshaping of one's being, a restructuring of one's frame of reference, allowing what is repressed to be made conscious. By definition, therefore, it is much more than adding cognitive content (while the container stays the same) or teaching the 'rules' of appropriate behavior (while leaving the underlying beliefs untouched). At the same time, the psychotherapeutic approach requires some detachment—an empathic, reflexive detachment—a stepping out of the moment into the larger personal history of relationships, which contextualizes the moment. This history includes our relationships to processes of knowing and to knowledge itself, (as knowledge is always and inevitably mediated through human interaction). Such a move and contextual understanding assists both parties to recognize that the current incident is but one instance of a recurring pattern. Furthermore, this detachment from the here and now moment signifies the opening up of a critical space or distance from which one can identify and question the assumptions that have been generating one's behavior and experience. The 'critical space' can then turn into the space of possibility—a transitional space, in Winnicott's terms,   - where alternate responses can be created.

In addition, this alternating pattern of absorption and detachment produces consequences for the learner, which is favorable for transformation. The teacher's/therapist's absorption is experienced by the learner as accompaniment as well as witness. Someone is walking with them as they navigate a psychic landscape that has been experienced as confused and troubling. Feeling accompanied, they feel less inclined to cling to or defend the meanings and frames of reference that have been generating their difficulties. Often when they see that our reaction to this landscape differs from theirs, they come to realize that theirs are not the only ones possible. It is important to note that this is not an indirect way of prescribing what their reaction should be. Rather it reveals the possibility to the learner of self-authoring (Kegan, 1983) a more satisfying response to a recurring situation.

With respect to the interplay between self and other, the learner can use the therapeutic relationship or the classroom as a kind of laboratory where he or she can try out different social skills, different ways of relating, or of thinking. That is, it is a context within which one can begin to *enact* new understandings, new premises for engaging in social interactions. Such enactments go some way to insure that those understandings become embodied, and not merely cognitive, understandings. We hold that enacted beliefs increase the probability that transformation will be consolidated. Once confidence has been achieved in the consulting office or classroom, the individual can begin to transfer those attitudes and skills to other social contexts.

With respect to the interplay between conscious and unconscious dynamics we believe that by invoking a number of different contexts drawn from the individual's life history, will reveal some invariables across those contexts. That is to say that interrogating multiple events allows certain premises to become visible that would not if we restricted our exploration to one, troubling incident. By invoking this larger context, the client can begin to 'see' how his or her beliefs structure their interpretation of this particular event. In other words they begin to see *their contribution* to the event; how they have constructed the meaning of the event. We also find that metaphorical language is particularly useful in allowing underlying premises to be revealed or experienced consciously. Our method is as follows: firstly, we identify the existential conflict embodied in their presenting dilemma; then we can imbed those dynamics in a metaphor or poetic language. Those elements, and the premises that generated them, have previously been unconscious or implicit but when they are encoded in metaphor they have a dual power. Firstly, they engage the individual's prereflective or unconscious self through simulating those same, troubling existential themes. Secondly, because the surface content of the metaphor is different from the provoking incident, while the existential arousal is the same, the individual can become conscious of the generating commonalities. Once so identified they can begin to critically examine the viability of their conflicting premises and begin the work of synthesis.

In summary, psychotherapy, when conducted well, creates facilitating conditions that encourage profounder forms of storytelling and reflexivity that often are the means for transformational change. In this presentation, three approaches will be discussed. Firstly, we focus on incorporating immediate interactional material into the content of the conversation. That is, we gather together as many strands of emergent intersubjectivity as we

can — and give them expression. By bringing in style and process as legitimate issues for discussion, we begin to include what previously existed outside of consciousness, into consciousness. For example, someone who always interrupts the other's speech is frequently unaware of so doing. Rather they are fixated on the content of what they wish to say. The news that they interrupt frequently along with a report of the impact that this has on the other's experience, often contributes significantly to the subject's understanding of why their behavior doesn't yield the results that they intended. In addition, incorporating interactional material into the conversation highlights the unique particularities of the subject's experience. This stands in stark contrast to having their experience forced it into some pre-established, theoretical category. To be known and accepted in one's uniqueness, not least by having one's experience witnessed, respectfully, is akin to being loved. Such recognition *encourages* the learner to authentically inhabit his or her experience. The importance of acknowledging particularities or singularities is often neglected in educational practices.

Secondly, psychoanalysis has a rich literature (Bainbridge and West, 2012) devoted to the analysis of the barriers preventing authentic contact in relationship. Analysis can serve to challenge the distortions we bring to our interactions. In addition, the client/learner/patient is seen as a potentially autonomous agent of change in his/her relationships and wider ways of being in the world. This need not be stated explicitly but rather is conveyed implicitly as a belief in the client/student's creative power. We devote some time to the resistances, anxiety and ambivalence that accompany most transformative processes, ones easily neglected or obscured in overly cognitivist understanding. Our experience reveals that there are significant existential costs in transformative struggles, but an empathic understanding of these shows the person that they are not alone. Successful transformation often involves the integration of the need to change, adapt, and evolve with the need to maintain one's integrity and continuity over time.

We expect the learner to activate and utilize their capacities, partly as a result of the praxis cultivated by the therapist. That is, the therapist/instructor models an immersion in what the other is communicating, as well as a capacity for feeding back, in digestible ways, new ways of seeing. Because these same capacities are developed and consciously exercised by all effective therapists, they can assist the client to do the same. Seeing those capacities embodied and enacted by one's therapist/teacher, is far more effective than a didactic lecture prescribing those behaviors.

Thirdly, transformation is enabled when the client can develop symbols, images and or wider narratives that adequately reflect existential distress as well as new possibilities. That is, when the person's conscious, reflective mind is able to faithfully impart meaning to their prereflective self's experience, a sense of coherence can emerge. An experience of wholeness and vitality that comes from integrating a first person (prereflective, spontaneous) and third person (reflective, analytical) point of view. Not only can a sense of coherence emerge, but also the motivation to carry forward one's life project.

Experiential Exercise

The following suggested experiential exercises are provisional because much depends on participant response to our initial dialogue. One of our guiding interactional principals is to be responsive to what emerges in the consulting office or the classroom. This same approach will be utilized during the presentation. In addition our presentation will show two different orientations to the topic of transformational or structural change. Seeing two different approaches, participants will be freer to become aware of their own, unique understandings. We will invite their contributions. We prefer this approach to the self consciously designed experiential exercises because the use of such exercises often assumes transferability back to the "real" world that is unwarranted. Experiential exercises tend to make a clean separation between action and reflection and this is their strength and weakness. We say that because our experience in practical settings is that theory and practice, reflection and action co-mingle in more complex and confusing ways. Rather we prefer to create an environment simulating what occurs in 'real world' settings and then unbraid theory and action by our comments on process. Nevertheless if the situation calls for it, we have developed two exercises which can be utilized to embody the quality of praxis we have discussed.

1. An exercise to develop an experiential "feel" for the apparently paradoxical qualities of detachment and engagement.

2. An exercise that establishes a long term autobiographical context for the current learning challenge.

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Growing a New Model of Community Engagement through Story Circles: Potential for Individual / Collective Transformative Learning

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In this paper you will learn about the *Tapestry: Education for All Bermuda* project, which was sponsored by the *Coalition for Community Activism in* Bermuda (CCAB). It involved collaboration among the Bermuda community, various Bermudian non-profit groups, and researchers from Teachers College, Columbia University and Florida Atlantic University. The *Tapestry project* was designed to facilitate an island wide conversation about "the meaning of education" in Bermuda through the use of a broad range of participatory research tools and processes. Through the use of inquiry-based practices drawn from the storytelling traditions of oral history (Vansina, 1985; Vannini, 2012) and anecdote circles (Callahan, Rixon, & Schenk, 2006; Kurtz, 2008), the *Tapestry* project was created to facilitate extensive reflective meaning making specific to Bermuda and her people. Our intention was to invite people to tell their stories about a range of lived experiences in Bermuda schools.

More specifically, in this paper we first provide a context to tell the story—a description—of the setting where the *Tapestry* Project took place with particular emphasis on the public school system because it was the focus of the project. We share the evolution of the Bermuda *Tapestry* Project with attention to how adults came together around a shared purpose and vision for improving education in Bermuda. Second, we offer a description of a story circle (i.e., what it looks like, steps for facilitation, and sample protocol). Third, we highlight learnings from the Project regarding making the transition from personal storytelling into collective meaning making; and finally we offer reflections on the complexity of transformative learning, which is often private and individually experienced, when it becomes public and socially generated.

The Story of the Tapestry Project

In this section we provide a description of the setting where the *Tapestry* Project took place with particular emphasis on the public school system. In addition, we outline the origins of a local movement to improve the quality of education in Bermuda.

The Setting

Bermuda, a British Overseas Territory and a former colony of Great Britain, boasts a population of some 65,000 plus citizens. Public schools are led by the Ministry of Education (MOED, hereafter). In total there are 25 public schools: 18 elementary schools, 5 middle, and 2 high schools. In addition there is one special-needs school. The Cambridge International Curriculum was introduced in the schools in 2009 (Drago-Severson, Maslin-Ostrowski, Hoffman, & Barbaro, 2012).

This curriculum was selected by the Bermudian MOED primarily to better prepare students to be successful on the O levels and A levels, international exams that are critical to entering universities abroad (retrieved 3/14/12 from <http://www.bermuda-online.org/educate.htm>). In Bermuda there is one institution of higher learning that leads to an associate degree; however, there are no four-year colleges or universities on the island.

The Seed

A *Review of Public Education in Bermuda*—locally referred to as the *Hopkins Report* (Hopkins, D., et al. 2007)—was commissioned by the government to examine the quality of schooling. In 2007, the Ministry of Education contracted with a team of researchers from England led by professor David Hopkins from the Institute of Education at the University of London to:

…evaluate the effectiveness of public education in Bermuda and identify strengths and areas for improvement; and to provide evidence for a thorough reform of the public education system using a transparent methodology with very clear recommendations for action that will result in rapid improvement of this sector of government with short time scales" (p. 3, *Hopkins Report*).

The resulting review found that:

Only just over one third of public schools in Bermuda are good or better in terms of their effectiveness. A small amount of outstanding work was seen. In contrast, the great majority of schools are satisfactory at best, and four are inadequate and a cause for serious concern. As a group the middle schools are the least effective. There are areas of under-performance throughout the school system, which becomes more evident as students get older. As a result, many do not make the progress they should. The professional leadership of education through the Ministry is inadequate and the Board of Education ineffective (p. 5, *Hopkins Report)*.

Not surprisingly, there was concern in the community as people tried to come to terms with the future of their schools. As shown above findings indicated there were significant problems that demanded urgent attention.

In March 2010, the Coalition for Community Activism in Bermuda (CCAB) became actively involved with the community and their response to the disturbing results of the *Hopkins Report*. CCAB's mission focuses on strengthening public engagement through coordinating research and facilitating connection within the community. As such their mission includes the following objectives:

- To establish a mechanism for on-going pubic engagement on education reform as a *model for engagement* on other issues
- To *develop popular grass root engagement* around education issues as a model for other issues
- To provide an opportunity for *groups to come together* around an issue in the Bermuda community
- To *model an approach to advocacy and collaboration* for other groups.
- To enable the public to influence public policy decisions with evidence-based information (February 7, 2011)

CCAB coordinated three sessions in Bermuda with the US consulting group, *Public Agenda,* to introduce the concept of *productive public dialogues.* In two sessions, interested citizens considered solid research that supports public dialogue and its use to engage the community in the issue of education. An interactive public session with 35 participants then provided an overview of the process of public dialogues, followed by an opportunity to explore the issue of how Bermuda could effectively promote active engagement of citizens. There was general consensus to bring people together to understand issues and address problems.

In April 2010, the seed for the *Tapestry* Project was planted when the community responded to the MOED's "Blueprint for Reform in Education: Bermuda Public School System Strategic Plan 2012-2015." Under the auspices of the Coalition for Community Activism in Bermuda (CCAB), which is funded by Atlantic Philanthropies, Mrs. Margaret Hallett—former Head of Somersfield Academy in Bermuda and coordinator of CCAB—and Dr. Janet Ferguson, researcher and facilitator, invited members of the community to engage in dialogue as to how to move forward, given what was learned from the Hopkins Report and the recently released *Blueprint*.

One result of earlier meetings was that CCAB commissioned *An Analysis of the Blueprint,* a review that was conducted by professors Andrew Hargreaves and Dennis Shirley of Boston College. They were recruited because of more than 40 years of research into educational reform. In addition to devoting careful attention into understanding effective teaching, they have zeroed in on the vital importance of involving and supporting the community in order to cultivate student success. Their analysis was circulated to the community and the MOED. Margaret Hallet and Janet Ferguson facilitated four community sessions aimed at developing a deep understanding of how to move forward and collaborate to improve education in Bermuda.

In general terms, four domains emerged from four community sessions they conducted, namely:

1. *Values*: What does the Bermuda community value about education? How do we understand education and how do our values have an impact on our schools? How does the *Blueprint* reflect these values?
2. *Communication*: What will it take to support the need for clarity and respectful relationships? How can information be strategically communicated simply and clearly and regularly? How can communication go both ways to create a supportive environment for parents and schools?
3. *Measurement*: How do we achieve accountability without being demeaning? How will the public know what the measurements mean? Can we trust the measurements?
4. *Parent and Public Involvement*: How can the community be more involved? How can we better support parents who are challenged about their involvement? How do we all create a climate of trust and support in contrast to one of doubt and antagonism? (EFA consultation meeting notes, December 2010).

This provided a platform for the MOED to develop a communications plan, but, of equal importance, it provided a basis for the community to take action on the ideas and suggestions that were put forward.

Volunteers met, engaged stakeholders in analysis, and talked with key government leaders. Project leaders envisioned a model of engagement using storytelling, conversation cafes, and dialogue while visiting community members in Bermuda's nine subdivisions (parishes) in order to explore and map community-wide understandings of schooling experiences and their value.

CCAB agreed to provide seed funding to support the emerging project, which was initially referred to as *Education for All* (EFA). After considerable deliberations and in consultation with university researchers from the United States, Margaret Hallett, who leads this project, Janet Ferguson and their team decided to use story circles as a vehicle to engage their community in sharing experiences of schooling in Bermuda with the explicit purpose of building new models of community engagement in the long term, while working toward a shared responsibility for heightening awareness of both common and divergent experiences of schooling, so that all students have an opportunity for a high quality education.

The Story Circle Experience: Listening In

[A story circle] is less concerned with the group's opinions and judgments; rather it seeks to elicit anecdotes and experiences. –*The Ultimate Guide to Anecdote Circles, www.anecdote.com.au,* p. 23.

In communities around the globe, public education is an issue that can galvanize a community to come together and find innovative ways to solve complex problems. Public education has an enormous impact on everyone—reaching across the lifespan, socioeconomic status, race, religion, gender, and sexual identity. It links to and influences virtually all issues in societies. The people involved in EFA became energized by the potential and possibilities inherent in employing the story-circle method to better understand the lived experience of schooling among residents of Bermuda.

Before presenting an example of the protocol employed to "catch stories," we offer some principles that underlie the story circles in which small groups of four to six people convene to tell their own and to listen to others' stories. These principles follow:

- People naturally tell stories and seek meaning
- Talking together enables people to connect and collectively build meaning, seek solutions, and take action
- People willingly participate when they feel safe, welcomed, honored, and respected
- Wide inclusion and diversity strengthen our ability to make wise decisions for action.
- As discussed below, each story circle has a facilitator whose role is to:
- Welcome people
- Provide general guidelines
- Manage the recording equipment
- Get the stories started with a key question
- Gently keep the process of sharing stories going

In addition, the facilitator has to create a space where all voices and experiences are welcomed, acknowledged and respected, and encourage an openness to listening deeply to all story-circle participants.

Sample Story Circle for Tapestry Project—The Technique: August 2011

In this section we offer a sample protocol that we employed as *story catchers* when conducting a story circle. As noted above, when facilitating story circles it is essential to create a safe, trusting, and supportive space that allows for honest sharing and learning. Table 1 displays basic structure and timing. We hope you find it useful.

Table 1. Sample Structure and Timing for Story Circle Facilitation

10 minutes	Overview of the project: why and how it emerged
30 minutes	Engagement in story circles
10 minutes	Debrief of story circle experience as transformative learning
30 minutes	Dialogue about challenges and opportunities in moving from story circles to engaging social systems
10 minutes	Closing circle

What follows is a sample protocol for facilitating story circles.

I. Welcome and Introduce Project

- Purpose

- Goals

- Context

- Appreciation

- Connection to *Tapestry*

- Overview of Process & Timing

- My Role as Facilitator

II. Warm up for listening

"So, I'd like to start with a couple of samples, just to get us warmed up for listening. I'll suggest three guidelines and please feel free to offer others."

- Listening is key – give people a chance to share their experiences without interrupting and with our silence we'll give permission for the story to unfold. Watch the person talking.

- Tell your experience with context, make it vivid for the listeners – try not to give opinions, but give actual examples of what happened.

- Be curious and honest and keep an open heart.

(10 -minutes total; facilitators tells 3 sample stories—his or her own, a local participant & a sample story from *Story Corps*—a national US project aimed at instructing and inspiring people to record each other's stories in sound < http://storycorps.org/>. This part provides a listening stance, non-judgmental, inspiration, gets into topic. Don't get into analysis or questioning yet. Keep letting stories emerge.)

III. Warm-up for story telling

Now that we've listened for a bit, we'll get started talking. Just to get warmed up could we each tell where we attended Primary and Secondary school and in general do you have stronger memories of one than the other?

Now that we know a little more about one another could we just shift around to be near to someone with whom you'll share some of your memories in more detail. (10-minutes; Help the group be comfortable together around the topic of school)

IV. Reflection break

We're just going to take a few minutes to think quietly to think about a time when you were a student in school and a particular lesson was being given that made you feel either absolutely inspired and confident or completely discouraged and confused. You might recall the classroom, the teacher, the other students or perhaps the subject. What was happening during the lesson?

V. Partner Stories

Now that you've recalled a particular experience that was meaningful for you we'll take 5 minutes to tell the recollection to one other person and then we'll switch. When it is your turn to listen and you hear something that makes you curious or interested to understand more use the phrase "Can you tell me more about that?"

As the listener, it will be your job to create a title for the story – you'll have to listen carefully! The listener will be encouraged to use the phrase "Can you tell me more about that" "Could you give me an example of that" Listener will create a title for the story. This part provides practice, delves deeper in an intimate setting, and allows the teller to understand his or her own story more. (Allow each person 5 minutes to tell story to partner; 12-minutes total.)

VI. Group story

Now we already have six stories about the lived experience of education in Bermuda. Thank you! Part of this project is to actually gather stories through recordings to be used for podcasts on a website, perhaps for an exhibit, for promoting discussion in conversation settings and perhaps even for creative expression such as a theatre performance—the possibilities are endless. When you tell your story to the group, please just say your first name and the school that you attended. While recording I will ask that the group to be as quiet as possible.

"Is there anyone who would like to start?" Invite someone to share their story with the group and this time do recording. This time the entire group listens. Invite others. Let the stories settle – don't do too much questioning. Simply thank people for their experience. Have a few moments of reflection using the doodle sheet (scratch paper). (30 minutes.)

Debrief

The process of listening can be quite intense. It takes patience, sensitivity and awareness. Thank you all for exercising those skills today! To conclude, I'd like each of you to identify one story that you heard that was particularly impactful or meaningful for you and simply thank the person for sharing his or her experience.

Training Volunteers to be Story Catchers

During the fall of 2011, project leaders developed a 50-page guidebook for volunteer hosts of story circles and used it to guide the training of 15 community volunteers to host story circles with special emphasis on active listening, effective questioning, ethics, and confidentiality. To date, ten story circles (including the pilot) have been conducted and recorded using hand-held devices with the voices of 50 people resulting in 90-plus discrete stories about the lived experience of schooling in Bermuda. These stories are woven into Bermuda's social fabric. Themes are being identified that create new understandings of the lived experiences of school in Bermuda.

Story Telling and Transformative Learning

While small in size, Bermuda is *big* in diversity of views with citizens of manifold cultural backgrounds. Engaging all voices in authentic conversation is important and not easy. Story can help build community engagement (Block, 2008). Story can create safe space for authentic listening and sharing in ways that stimulate memory of past while fostering imagination about new futures. Story lets people walk in one another's shoes and opens the door to empathic understanding of "the other." Empathy enables conversation that invites rather than judges and critiques. This gives rise to fresh thinking, questioning of strongly held views, and openness to reframing beliefs about how things were, are, and need be.

Heron and Reason (1997), as discussed by Yorks and Kasl (2002), conceptualize this as presentational knowing that supports participative engagement in collective meaning making that can lead to new action. "Presentational knowing" enables empathic understanding in ways that spur awareness of likeness as much as difference. This builds a basis for social knowing and genuine interest in how those experiencing story telling might work together based on reframing of the "problem." Story circles may result in transformative learning based on anecdotal information and observation (e.g., someone we overheard called the pilot story circle "truly life changing!") Individual transformative learning, through story circles, is conceived as catalyzing small group and community-level change.

Questions have emerged, for example, how to launch this project with passionate, but time-constrained and overextended volunteers; and how to re-present stories to engage the larger community meaningfully—with what media—without distorting the stories themselves. In the meantime, unexpected opportunities have arisen. MOED leadership asked Hallett and Ferguson to conduct training with senior MOED leadership on public engagement and communication.

In this session, we invite participants to experience story and to dialogue about whether and how the learning generated through story telling is transformative for individuals, and because of its social nature, for the broader community engaged first or second hand in story. What does it take to enable "the other" to "live" the experience heard even though that story is not his/her own experience? How can story "hook" the listener and draw him/her into the re-presented story? How does technology help to re-present and re-frame in compelling ways?

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Transformative Learning in Higher Education: Epistemological Crossroads

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Abstract

This presentation explores the practice of transformative learning in graduate education from four epistemological crossroads, juncture points for deepening "how" we know.

- We know through critical reflection on experience.

- We know through discovery of ethics in action.

- We know through scrutiny of transformative practice.

- We know through contemplation on the situation at hand.

The authors plumb each of the epistemological wellsprings above based on our individual and collective understanding shared in a community of practice that is focused on transformative learning as an intentional teaching practice.

Keywords

Transformative learning, critical reflection, community of practice, higher education, ethics, epistemology

Introduction

We begin by grounding our presentation within the context of our institution, its graduate programs, and the authors' involvement in a community of practice. Next, some aspects of transformative learning that relate to the epistemological crossroads are briefly reviewed and discussed.

The expectation for teaching excellence is embedded in the culture at The University of the Incarnate Word (UIW). The mission emphasizes welcoming people of diverse backgrounds, cultivating cross-cultural awareness, and building mutual understanding. In our graduate education programs, we work to ensure that concepts of multiculturalism and a global perspective become threads throughout the curriculum and embrace different ways of learning. Cultivating and engaging in cross-cultural research and practice, and promoting cross-cultural awareness and experiences with students are high priorities. The University and our programs provide support for collaborative inquiry, critical reflection, and dialogue (Herbers, Antelo, Ettling & Buck, 2011).

The authors comprise a community of practice (COP) which is a collaborative learning laboratory for improving our teaching and our graduate education programs (Herbers, Antelo, Ettling & Buck, 2011). Through reflective practice, civil discourse, and democratic processes, we have been challenged and encouraged to persist in the power and the peril of facilitating transformative learning in higher education.

In our teaching and our CoP, there are many opportunities to practice transformative learning (Cranton, 2006; Mezirow, 1991; Mezirow, 2000; Taylor, 2000). We think of this type of learning as perspective transformation with deep, long lasting learning. It has been characterized by evolving habits of mind and new structures for engaging one's identity (Kasl & Elias, 2000; Mezirow, 1991) that recognize the interconnected web within the universe and accept the responsibility we have for one another and the earth within that web (Ettling, 2006). The framework of transformative learning we use in the four epistemological crossroads to deepen how we know and learn include: 1) the disorienting dilemma, or a crisis or trigger event in one's life which leads to some discomfort; 2) a critical reflection process of questioning and reflecting on one's assumptions and beliefs; 3) an exploration of new ways of thinking and behaving as previous habits of mind no longer make sense; 4) trying out these alternative perspectives; and 5) integrating them into one's life and the way one processes future experiences, which may include the potential for expansion of one's historical and cultural understandings.

Transformative learning theory affirms that the fundamental purpose of development in educating adults is the transformation of individuals and society. Arnold and Ryan (2003) explain this purpose as the idea that students of the 21st century have the potential to actively create the communities in which they live and learn, rather than live on the margins of those they inherit. Mezirow (2000) describes this kind of development as "the process of using a

prior interpretation to construe a new or revised interpretation of the meaning of one's experience as a guide to future action" (p. 5).

Education, while an emancipatory process, obliges the educator to preserve the dignity and foster the integrity of every individual learner. Transformative learning practice further requires the educator to be willing to disclose and help create the space where trust can flourish. Without a safe climate where participants can confront their biases and limitations without judgment, transformative learning is stifled (Braxton, 2010). This environment calls forth, from both students and instructor, the willingness to become a community of learners, sharing the journey and learning from the other. In cultivating or facilitating transformative learning, the educator encourages, guides, and supports the process through transparency to build trust; supportive relationship building; and creating a safe climate for confronting biases, fears, and beliefs. Within the CoP, a key goal is to continually grow in these capacities.

With this framework in mind, we now address the practice of transformative learning in graduate education from four epistemological crossroads for deepening "how" we know and learn.

Four Epistemological Crossroads

Knowing through critical reflection on experience

In this section, we share experiences of knowing through critical reflection as a process within a teaching situation. It seems appropriate to address the conceptual framework being employed. Process is advanced as a form to depict the beginning, development, and ending of a human intentional activity. Identifying the start of something and its end helps to see the most appropriate way to engage in doing it. Additionally, the concepts of critical thinking and related terms such as critical reflection, as proposed by Brookfield and others, involve developing critical thinkers by challenging adults to explore alternative ways of thinking and acting (1987). More specifically, Boyd,1983, as cited in Brookfield, define reflective learning as "the process of internally examining and exploring an issue of concern, triggered by an experience, which creates and clarifies meaning in terms of self, and which results in a changed conceptual perspective" (Brookfield, 1987, p. 14). Lastly, improving a process to do something represents an action that can in turn improve the outcome. Consequently, the quality of an outcome or product cannot be higher than the quality of the process used. This is particularly important because it the process can be learned and then improved. We can teach people to do a better job by simply recreating an option that will produce an improved outcome. Under this reasoning, it can be concluded that "purposeful, reflective judgment which manifests itself in reasoned consideration of evidence, context, methods, standards, and conceptualizations in deciding what to believe or what to do" (Facione, 2011, p. 22) represents critical thinking and the way it can impact the expected outcome. In this light, outcomes are not process but are affected by it. This reasoning makes outcomes a dependent variable which changes upon the effects caused by the process used.

Some descriptions depict the discussion above. Imagine a situation in which a professor introduces in a doctoral class the concept of critical thinking and asks students to reflect critically on the process of doing qualitative research. This represents a teaching situation or the experience students are exposed to. Many students were clearly indicating they have serious concerns about doing research based on words depicting peoples' feelings, thinking, and biases. Applying the process model explained earlier, this experience forced the students to observe the experience, describe the context in which the experience is happening, and clarify or apply their personal/professional assumptions. Each student expressed their opinions, feelings, and values. Many were contradictory. Their understanding of the truth and their ways of knowing were actually challenged. The exchanges were either expressing alternatives to science making or strong skepticism about the credibility of the qualitative research process. Some of the highlights included: "I don't believe in qualitative research"; "it is a process filled with biases and personal opinions"; "the absence of facts is clear"; "scientific control or design is weak." When students were confronted with meaning expressed orally by people as "I love you, mother" and similar expressions, their concept of truth seemed to have changed. The figure below illustrates the unfolding of the incident. The experience motivated an analytical process that resulted in a more acceptable vision about qualitative research. This is the reflective judgment produced by the teaching incident.

Figure 1. A Simplified Process to Reflective Judgment

This incident helped the writer to recognize that critical reflection could be a major activity of the teaching/learning process. Moreover, the process shows when faculty members transfer the control of the learning process to students, critical reflection is more likely to occur in the classroom. This happens when faculty structure student participation for reflecting on major aspects of the content.

To introduce a teaching strategy aimed at increasing meaningful student engagement, a doctoral class was selected and some teaching materials and activities were planned. After some teaching preparation for using the critical incident technique based on Brookfield's Critical Incident Questionnaire (CIQ), the class followed a standard procedure--motivational activity, introducing the class purpose; delivering content; evaluating learning. During the delivery section, an accelerated learning activity was used along with an experimental design exercise. Student guided group presentation/discussion followed on a previously assigned topic. At the end of class, 12 class members answered the CIQ's six questions. Some of the emerging topics included:

A. **At what time did you feel most engaged tonight?**

Discussion in small groups

Participation on class exercises

Student initiated questionings

Sharing common research topics or assignments

Instructor initiated questionings

B. **At what moment did you feel most distanced from what was happening**?

Time—end of the first half of the class

Speaking at a great length—student initiated

C. **What action was most affirming or helpful to you**?

Instructor agreement with student ideas

Student questions

Explanation of the experiment

Students sharing personal experiences

Working in groups and group discussion

D. **What action was most puzzling or confusing**?

The new activity

Experimental designs

Class questions

E.   **What about the class surprised you the most?**

How difficult something so easy can be once one back ups/affirms an experimental decision

How engaged people were, including me

How much I had to share and talk

Impact of the circle formation

F.   **What insight did you realize about yourself as a learner**?

Filtering information based on key terms

Understanding more than I thought

Have a long way to go

More interactive and situational learner

Visual learner
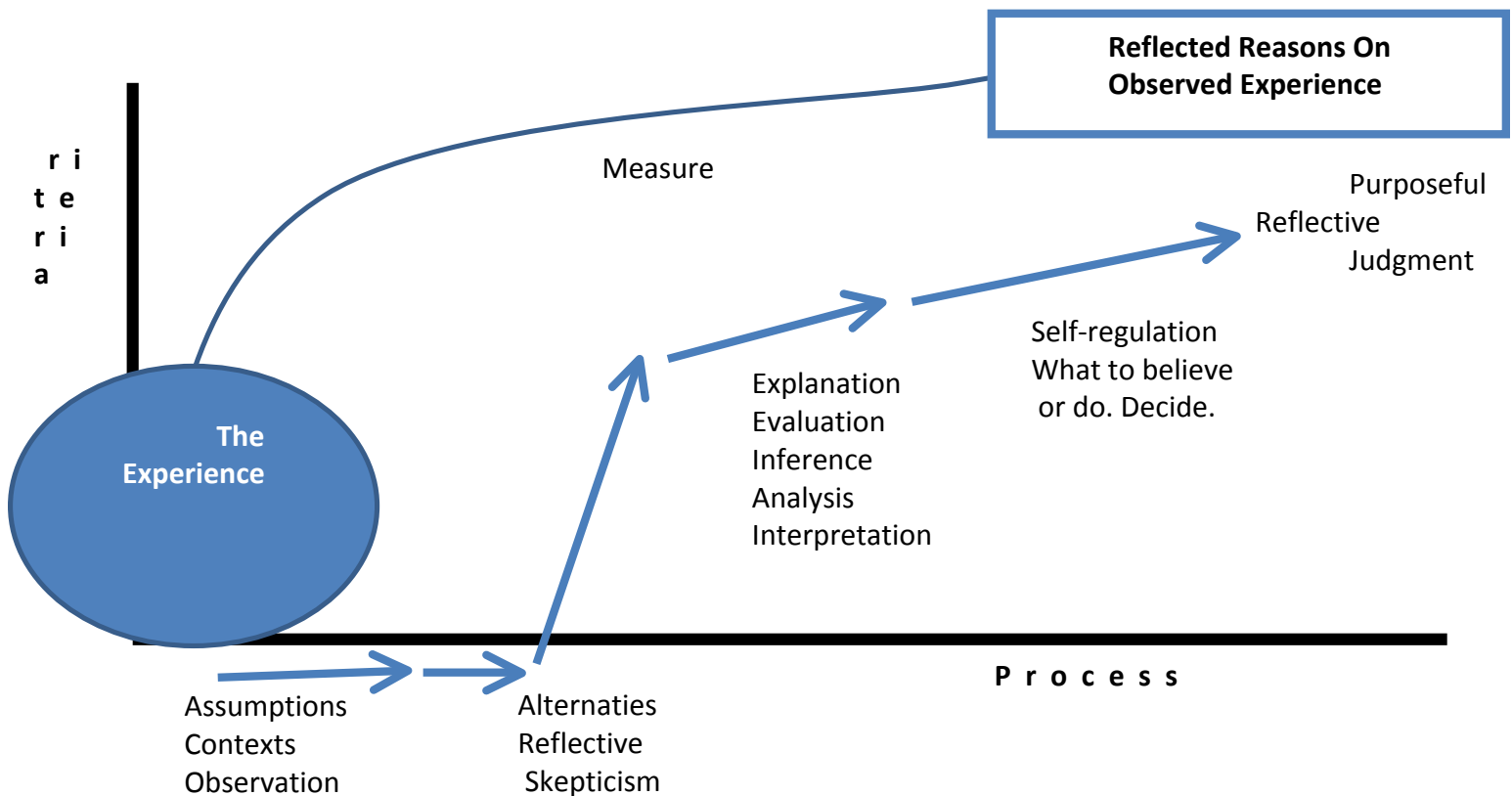
Figure 2. The Reflective Process Based On Facione's Model of Critical Thinking.

Source: Developed from Facione, P.A. (2011). *Critical thinking: What it is and why it counts.* Millbrae, CA.: Measured Reasons and The California Academic Press.

It was clear that the experience triggered a reflective process using the trajectory presented in the cited figure.

Knowing through the discovery of ethics in action

While many approaches to teaching ethics for professionals exist, a comprehensive foundation for understanding ethics before it can be applied for decision making is critical. This process requires time and a plan that will progress students toward the beginning of effective decision making. This model is designed for a traditional 16-week semester and divided into three phases. In Phase I, students begin with the question, who am I (are we)? This leads into understanding **descriptive and meta ethics** by students exploring who they are as individuals (their moral base) and building a profile of their classmates. Through class dialogue, the language of ethics begins to take shape, leading into a focus on meta ethics, which sorts out the lexicon of values in the class and the meaning of moral judgments. Once students develop a sense of how to deal with nuances of various epistemological perspectives (and their own potential biases), they move into Phase II: **normative ethics**. This phase is driven by the question, who should I/we be? Delving into three major traditional theories (consequentialism, deontology, and virtue ethics), students begin to apply what they have learned in Phase I and situate the various Western values within each approach to knowing. Students are then introduced to other worldviews/theories of ethics to include Hinduism, Buddhism, African Ethics, and Native American, to name a few. Developing a global perspective is one of the main objectives of this course. Each theory/worldview is revisited within the construct of descriptive and meta ethics through reflection journals and class discussion until they can articulate and contextualize common values and those that are in conflict, leading to an ethical dilemma. In the final phase of this course, students are challenged to articulate conflicting values within the context of various professions through case analysis. This process follows a decision making model: 1. Present the problem; 2. Collect relevant information; 3. List relevant and conflicting values; 4. List assumptions by making logical connections; 5. Explore the options through the various theories and worldviews; 6. Assess the rightness and wrongness of various possible outcomes; and, 7. Decide, defend, and reflect. In this final phase, students are concerned with the question, what should I/we do **(applied ethics)**?

Knowing through the scrutiny of transformative practice

In our first year as a community of practice, we made a commitment to scrutinize our teaching practices, individually and collectively. As individuals, we critically examined the congruence of our teaching practices with our stated philosophies of teaching. If we espoused a democratic classroom where participants feel safe to challenge each other and the instructor, did we create a space where it was safe to say "That hurts" "I disagree" or "I am confused"? Did we acknowledge that we do not have the answers but we do have many questions? Did we acknowledge the anxieties of our learners and our own anxieties?

Maxine Greene states, "If we teachers are to develop a humane and liberating pedagogy, we must feel ourselves to be engaged in a dialectical relation" (1995, p. 52). This dialectical relation may begin in the classroom in authentic conversation with learners or in frank discussion with colleagues. It is easy to share successes and insights but research in transformative learning clearly shows that disorienting dilemmas can be the catalyst for deep learning that leads to a broader and more inclusive perspective (Taylor, 2000). Members of our CoP wrestled with content and process issues without fear of alienation or disapproval. The ownership of the missed opportunities for teachable moments, conflicts in the classroom, and student resistance to content or processes, led to deeper understanding of self and systems. It was affirming to find colleagues experiencing student obsession with grading, and resistance to peer and self-assessment. The sense of collegiality was strengthened and the idiosyncratic challenges became more evident.

The epistemology of scrutiny for educators requires openness to the viewpoints of others, even about teaching practices we hold dear. It invites us to relinquish control and truly examine structures that limit active inquiry and stifle student responses. It challenges us to create a space for authentic engagement.

Knowing through contemplation on the situation at hand

Over the last two years, our own community of practice discussion on classroom practice has grown in focus from critical reflection on experience to include an emphasis on promoting a contemplative mode of teaching and learning. Transformative learning advocates (Altobello, 2007; Ettling, 2012; Gunnlaugson, 2011; Hart, 2004; Morgan, 2012) have promulgated this development in the field and claimed it as a natural evolution in transformative learning theory and practice. For our purposes, knowing through contemplation implies conscious creation of a space in the classroom where both faculty and students can engage in mindful awareness of their learning experiences. Even for mature graduate students, slowing down to create this awareness is a tedious

challenge. It interrupts the fast pace we have grown accustomed to with constant stimulation and interactive technology. Slowing down our engagement with one another in dialogue disturbs our comfort and our sense of immediate accomplishment.

We share one example of an attempt to bring this contemplative practice more consciously into the learning experience   A recent Ph.D. seminar course focused on examining Participatory Leadership practice through the lens of gender and culture issues. The format for the course highlighted the collective viewing of popular movies that provoked emotion and controversial responses to a film's drama and, oftentimes, ambivalent conclusions. Extensive dialogue, followed by application to theory and research, formed much of the course structure.   The class was relatively small and allowed for an engagement that prompted openness and vulnerability. The students were mature in age and experience, yet represented a variety of cultural, social, and work backgrounds. Using Gunnlaugson's (2011) concept of "presencing" (p. 7) and his framework for becoming "aware of the 'intersubjective field'" (p. 12), the teacher and the students were guided into dialogues that unlocked strong emotions and uncovered fixed assumptions about the role of leaders in difficult situations.

Times of silent reflection, probing questions, small group encounter, and conscious commitment to norms of deeper listening to one another were some of the practices that fostered a real sense of community in the class. But along with the openness and trust created came a much more meaningful encounter with the actual content of leadership practice. New images emerged which, in turn, fired up the students' interest in the potential of transformative learning.

What ensued over the eight weeks of class surprised even the instructor. We all engaged in a profound sense of one another as learners through the discourse. Initially, some students expressed concern about the seeming "therapeutic nature" of the dialogues, since the films enacted situations that touched pointedly into their experience. But very quickly, this concern was dispelled by the realization that a new kind of learning was taking place, both through the viewing and the intense dialogue. Excitement and gratitude were the overarching impressions at the end of the course. Gratitude for taking the time and attention that was necessary to engage at this depth. Students who had doubted the possibility for theoretical and research applications in such a format were motivated in new ways in their leadership studies. And as the instructor, I knew I had gained as much, if not more, than any of the students.

Conclusion

Five colleagues have identified four epistemologies, critical reflection, discovery of ethics in action, scrutiny of transformative practice, and contemplation on the situation at hand, which have emerged in a community of practice. Each of us came with a deep appreciation for critical reflection and a belief in the transformative power of teaching and learning with diverse participants. Through the uncovering of ethical issues in action, the scrutiny of our practices, and contemplation within classes and within our community of practice, a way of knowing has emerged which is consistent with the presentational knowing identified by Kasl and Yorks (2012). The individual ways of knowing or epistemologies have drawn from each of the others. There has been a reshaping and differentiation of practices and beliefs as we have shared our affective responses and experiences in the classroom. We have increased self-awareness and enhanced understanding of how we have come to know what we know through dialogue with colleagues and co-learners in classrooms. This iterative process has strengthened our community building capacities. The community of practice dedicated to examining transformative learning practices has fostered the epistemological coherence of the intrapersonal, interpersonal and collective (Kasl & Yorks, 2012). We believe the community of practice offers an effective model in academic and adult education contexts for fostering transformative learning.

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Towards an Integrated Research Framework for Transformative Learning Theory

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Abstract
The transformative learning literature has become increasingly divergent. There is now such a diversity of approaches and addendums to Mezirow's original model that it is scarcely recognizable as coherent theoretical framework. Therefore, one of the most pressing needs of transformative learning theory is an overarching framework capable of integrating a variety of perspectives on transformative learning theory. This paper proposes 1) an approach to thinking about transformative learning theory that may help with this integration, and 2) the beginnings of a model derived from this approach that is potentially useful as a framework for integrating transformative learning theory.

Introduction: The Need

Over the last two decades, the literature on transformative learning has become increasingly divergent in nature. There is currently such a diversity of alternative approaches and addendums to Mezirow's original model that it is scarcely recognizable as coherent theoretical framework. In fact, I do not think it is an exaggeration to say that one of the most pressing needs of transformative learning theory is an overarching framework that is capable of integrating the variety of approaches that researchers have used – or may yet use – to understand transformative learning (Cranton & Taylor, 2012; Gunnlaugson, 2008).

I have probably been sensitive to the inadequacies of transformation theory as a viable research framework because of research I have been engaged in with breast cancer survivors who claim to have experienced significant positive change because of their cancer experience. In my initial study, my focus was on what this change process looked like when perceived as "learning." These women all experienced deep, fundamental change, but the specific types of change they experienced were diverse. Mezirow's model helped explain only a small part of the participants' overall learning and change experience. In trying to decide on specific approaches to transformative learning to make sense of the data, my attention was riveted on the glaring problem of using one term, "transformative learning" to encompass a variety of phenomena.

An Approach to a Solution

Integrating the theory of transformative learning is a monumental task, but I believe that the key to integration lies in articulating and differentiating the phenomena we study. Said differently, the reason we see such diversity of approaches in the transformative learning literature is simply because the various theorists are talking about different phenomena. This paper is a presentation of my observations in this regard, especially as they have been influenced by two research studies I have been engaged in during the last few years. Specifically, I present an approach to thinking about transformative learning that may help to integrate seemingly divergent approaches to the theory. I also present the beginnings of a model that emerged from applying this approach to two research studies and that ultimately may serve as a framework for integrating seemingly divergent approaches to transformative learning theory.

The Current Situation

The emphasis people normally place on Mezirow's depiction of transformative learning is on the process described; the common critique being that it is too presumptive that rational analysis yields deep, transformative change. What is not focused on – and what needs to be brought to attention – is the phenomenon Mezirow seems to be addressing. Although his definition of meaning perspectives is very broad, his description of the change process alludes to changes in one's underlying schemas or worldview assumptions.

Meanwhile, Lawrence (2005) and others (Hoggan, Simpson, & Stuckey, 2009; Jarvis, 2012) write about artistic engagements as a means of experiencing deep personal transformation. This focus is usually on learners' ways of knowing – arguing that changing from the western norm of logico-deductive reasoning to a more holistic artistic way of knowing is transformative.

Similarly, Dirkx' notion of "soul work" stems from the midlife process of individuation (1997). The phenomenon described is about people developing new ways of being in the world – a greater wholeness. Those who focus on spirituality (Charaniya, 2012; Tisdell & Tolliver, 2001) also seem to address this phenomenon of new ways of being, although they address a greater sense of spirituality or connectedness.

The constructive developmental perspective describes cognitive development as being transformative, but obviously the subject-object differentiation described by Kegan (2000), for instance, is a different phenomenon than the ones described above.

My list could go on. The source of our integration problems in transformative learning lies in our tendency to lump all the phenomena under the same linguistic umbrella. If a person experiences some form of deep change that fundamentally shifts how they interpret, experience, and/or interact with the world, we want to call it "transformative learning." This is understandable since learners perceive these types of experiences as being transformative. Nevertheless, just because a variety of experiences are all perceived as transformative does not mean that they are the same phenomenon.

The biggest challenge to integrating the myriad approaches to transformative learning is that they often are grounded in different theoretical foundations. How can our field weave together a coherent theoretical framework from disparate academic traditions? It cannot if approached that way. This challenge can be overcome, however, by beginning with the types of change people experience that can be considered "transformative," and then allow for individual theories from disparate disciplines and perspectives to inform our understanding of any particular type of change.

A Model: The Beginnings

Over the last few years I have been engaged primarily in two different research studies. The first study was with 18 breast cancer survivors who claimed to have experienced significant positive change because of their cancer experience, and the second explored the impact of reading fiction on the learning of 131 undergraduate and graduate students. The disparity of the studies was intentional; I wanted to look at transformative learning from two very different vantage points. Obviously breast cancer is a much more impactful stimulus for change than a mere classroom activity, but both types of learning contexts, I hoped, might illuminate important commonalities. One of my biggest ah-ha moments did not occur until after the second study was concluded and I reminisced on the overlaps and disparities between the two studies.

In the study focusing on the role of fiction in promoting transformative learning, the learning objectives were minimal when compared to the depth of change expected from a cancer experience. Nevertheless, as educators we hoped that the students would engage in some processes conducive to transformative learning – even if those processes were only a small contributor to any eventual transformative outcomes that happened long after the course was finished. In hindsight, the participants seemed to be describing different facets of their overall meaning making process. If we are willing to examine a person's experience of transformation by articulating the specific facets of their meaning making process that changed – rather than assuming that the terms "learning" or "transformative learning" refer to the same phenomena in all people – then we have the beginning of a more nuanced and potentially integrative approach to transformative learning. In the case of students in our study, the facets of their meaning making process that were affected could be described as Context, Orientation, and Epistemology – with some students demonstrating potential changes in Schemas and Ways of Being. These facets are described below.

Examples from Research

The change process for our students started because of a change in *Context*. All meaning making occurs within a physical and social context. Indeed, meaning-making is not truly an individual process, but can be better described as a personal process that occurs inextricably within a larger social framework (O'Sullivan, 2003). The participants were immersed in a classroom environment wherein the authority figure modeled and encouraged openness and critical reflection, as well as a host of implied values such as the importance of self-awareness and understanding others' perspectives. It seems safe to say that all students experienced a minor change of Context while in the classroom. Although such a change does not qualify as "learning" by itself, context seems so integral as a facet of the meaning making process that an analysis of learning has to take it into account.

The Context shaped the students' *Orientation*; the story and discussions focused their attention on the constructed nature of knowledge and the social and cultural biases inherent in the knowledge-construction process. Focusing the Orientation is a relatively easy task in a structured learning environment and almost every student demonstrated such an Orientation during the discussions and reflections. Some few, however, did not demonstrate

the desired Orientation – and those who did not do so also did not demonstrate any further changes described below. When this change in Orientation is temporary, it does not equate with learning. However, this study demonstrated that Orientation – even when temporary – is an important, possibly necessary step in the learning process. (It also seems reasonable that truly transformative learning would affect the day-to-day Orientation in at least some contexts.)

Another result of the designed Context and Orientation is that the students were prompted, through modeling and practice, to use a particular *Epistemology* or way of knowing. Regardless of whether or not this epistemology was an explicit learning objective, the meaning making process always uses some form of epistemology. Because the short story selected for the learning activity was a metaphorical work of fiction, it encouraged an imaginative way of knowing. Additionally, the discussion and writing activities encouraged a critically reflective way of knowing. A few students had difficulty with one or both of these epistemologies; some students claimed that the story was too unrealistic for them to appreciate, and others demonstrated an epistemology focused on defending particular worldviews rather than critically reflecting on them. In most cases, however, the students seemed able to at least experiment with the designed Epistemologies in the class.

Learning a new Epistemology can be difficult because it is usually tacit: modeled rather than explained, implicit in interactions rather than explicitly stated. We as the facilitators tried to help students learn and use both imaginative and critically self-reflective epistemologies. Some students' reflections focused on the experience of using one of these epistemologies or the way the instructor modeled an epistemology. Possibly, these students were relatively unpracticed with one or both of these epistemologies before this learning activity, and therefore learning to use a new way of knowing was an important part of their overall experience.

Some students demonstrated critical reflection and critical self-reflection that indicated a potential change in *Schemas*. This change in Schema mirrors Mezirow's model of transformative learning. Other students spoke of specific characters or metaphors in the story and expressed a corresponding desire to live differently: more open-minded, less judgmental, more aware of their own biases. This potential change could be described as *Ways of Being*, which is distinct from a change in Schemas. In both case, these potential changes were beyond our timeframe to see.

Important differences existed in the breast cancer study, the most important of which is the severity of the "disorienting dilemma" that the women experienced. For most of them, their cancer diagnosis and the wide variety of ensuing challenges resulted in changes to every facet of the meaning making process that was evidenced in the Fiction study: Context, Orientation, Epistemology, Schemas, and Ways of Being. However, presumably because of the intensity of the "disorientation" and the longer timeframe, they described more profound and long-lasting changes. Further, they also described facets of their meaning making process that did not show up with the students. The facets could be described as Felt Experience and Self-in-Relation. I will use Nina (a pseudonym) as a case study to elaborate.

At the time of the study, Nina was a 58-year-old widow with three grown children. She was a nurse her entire career until breast cancer and resulting health issues forced her to retire. Her change in *Context* included a cancer diagnosis with all the ensuing reminders of her mortality, profound sickness and fatigue caused by the cancer treatments and an inability to drive or work. Her change in Context also included her economic status as it shifted from middle class to poverty. Further, she changed from being a very independent provider for herself to having to rely on others; she moved in with a daughter while undergoing treatments because she could no longer perform even simple tasks required to live independently – and even now requires "charity" from others for transportation and medications.

Nina experienced changes to many facets of her meaning making process. The changes in her Context, described above, resulted in changes in her *Orientation*. Normal day-to-day concerns were replaced with issues of mortality, survival and purpose. Whereas her pre-cancer life focused on work, her cancer experience prompted her to focus on dealing with discomforts of sickness, pragmatic issues of physical and financial survival, as well as intense existential wranglings. Now that her cancer treatments are finished, her day-to-day Orientation is still different than what it habitually was before cancer. Her attention is, of necessity, still on rudimentary survival challenges – albeit financial survival rather than physical survival. Additionally, her attention is on finding ways to fulfill whatever purposes God has for her.

Nina made a conscious choice for her *Epistemology*; she purposefully reframed challenges, through prayer and reflection, into something positive. Nina made a conscious effort to interpret life events from the perspective

that God was either causing or allowing everything to happen, and therefore her job was to think positively and exercise faith that everything would eventually be for her good. Using prayer, reflection, and positive thinking as the basis of her knowledge, Nina was using an Epistemology that she either did not use in the past – or at least did not use as often and as purposefully as she has since her cancer experience. Of particular importance here is that she was not using a particular Epistemology in order to discover Truth or greater validity or justifiability, as Mezirow describes. Rather, she chose an Epistemology based on its helpfulness as she tried to cope with the loss of her health, independence, identity, and sense of well-being.

Nina alluded to changes in her *Schemas* as she spoke of reframing challenges from something negative to a positive learning experience from God. This reframing demonstrates a purposeful attempt to change some of her Schemas, but in a distinctly different way than described by Mezirow. This difference makes sense because Nina had different purposes and used a different epistemology than Mezirow described.

When asked to describe the primary ways that she changed, Nina spoke of *Ways of Being*: her biggest change is being more present in the moment and having a stronger relationship with God. She also said she is now more prone to seizing opportunities to experience life rather than just being caught up in her work, as she used to be. She described spontaneity in joining group tours of local museums and spending time with grandchildren.

Nina's struggles were no academic curiosity; she described the *Felt Experience* during cancer as consisting of intense feelings of loss, loneliness, sadness, depression, helplessness, and homesickness, as well as physical symptoms of pain, nausea and fatigue. Although these emotions and symptoms are temporary, they nevertheless form an important part of her meaning making process – especially while enmeshed in the cancer experience. Now that treatments have been concluded for several years, she described the Felt Experience of her day-to-day life as peaceful and meaningful.

Changes to *Self-in-Relation* were evidenced by her struggles with self-image and the meaning and purpose of her life. As with most of the other survivors in this study, Nina said the experience was so difficult that if she could have chosen not to go through it, she would have opted for an easy out. As with them, she had no choice. Nina's Self-in-Relation ultimately shifted from a self-image defined by her independence and profession (nurse) to one that has shed its skin of definitions and centers exclusively on her relationship to God. Her change in this regard is very similar to Kegan's (2000) description of a subject / object transition.

Discussion

The purpose of a theoretical framework is to articulate the researchers' preexisting assumptions relative to a particular study and to focus their attention on specific types of data. The problem with Mezirow's model is not that it is wrong, but that implicit in it is a particular epistemology – and the changes he described flow from that epistemology. Specifically, his implicit epistemology is based on a conscious awareness of underlying assumptions (Schemas) using critical self-reflection and group dialogue as a way of determining validity. Such an Epistemology shapes the types of ways that one's Schemas will change, and perhaps eventually the ways that one's Ways of Being may potentially change (more self-aware, cautious about certainty, more cognitive in one's emphasis). When other researchers and theorists criticize Mezirow's approach, it is usually because they are talking about transformative change in people that affects different facets of the meaning making process other than Schemas – or that affect Schemas in a way that is different from what Mezirow's Epistemology would affect.

For instance, Nina's most profound changes lay deeply in her meaning making process – at the Self-in-Relation level. A researcher using Mezirow's model will be prompted to focus on ways in which her Schemas changed, but such an approach would be focusing on a narrow and relatively unimportant aspect of her overall learning process. She changed primarily because her Context forced her to live in a way that was acutely painful and inconsistent with her habitual Orientations, predominant Epistemologies, existing Schemas, habitual Ways of Being, and entrenched Self-in-Relation – and her Felt Experience included intense emotional and psychological discomfort until she adapted all these facets of her meaning making process to her new Context.

My assertion is that learning can be perceived as relatively permanent changes in the meaning making process (of an individual, group, or society), and that this process is composed of several interconnected facets. The proposed model prompts researchers to focus on the ways that these different facets change and interact with each other. Further, it prompts researchers to consider theories to include in their theoretical framework based on the types of changes in the meaning making process that seem relevant to their study. Following is a list of the facets described above with examples of areas of literature that address them.

Context – Situated Cognition (Lave & Wenger), Communities of Practice (Wenger), Zone of Proximal Development (Vygotstky), most Sociological and Critical approaches

Orientation – Kahneman & Tversky's research on economic decision making, Framing, Choice / Will

Epistemology – Epistemology, Critical Self-Reflection, Ways of Knowing (Artistic, Extra-rational, Holistic), Discipline-specific epistemologies (math, logic, scientific method, accounting), Cultural rules of thumbs and maxims

Schemas – Mezirow, Piaget –also Biographical Reframing (Alheit, Dominice)

Ways of Being – Authenticity (Dirkx, Cranton), Personality Characteristics (Jung), Thinking / Learning Styles, Multiple Intelligences (Gardner), Spirituality (Tisdell), Existential (Willis)

Felt Experience – Presentational Knowing (Heron; Kasl & Yorks), Emotions (Damasio), Emotional Intelligence (Goleman)

Self-in-Relation – Illeris, Kegan, Rogers' Significant Learning

Areas of Further Development

Several considerations for further development need to be addressed. Are there other facets of the meaning making process that need to be included? (I am already wondering how Capacity of each facet should be considered, as well as how Behavior and Imagination would be addressed by the model.) How do the facets interact with each other? What type of change within a given facet is necessary to be considered "transformative" – or does a particular facet (such as Self-in-Relation) have to change? To what extent does Context drive change – or, when is change initiated in facets other than Context? Is there an order to these facets through which change has to flow, as the list above implies – or, are particular facets immune to changes in other facets?

The underlying foundation of this paper is the assertion that current approaches to transformation theory seem contradictory primarily because they address changes in different facets of a larger meaning making process. The model presented in this paper is an exploratory attempt to design an overarching framework that allows for the integration of diverse approaches to transformative learning by differentiating between specific facets of the meaning making process that undergo change.

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Transforming Equity

Margot Hovey-Ritter

Abstract

Through a case study of a virtual team, this research reveals that multiple cultural (and national) practices is a key capacity for leaders of virtual teams. With this capacity teams can create a container for productive, efficient and highly effective performance. Transformative Coaching provides a structure to develop these capacities.

Introduction

This case examines the evolution of a virtual team in a VoIP (Voice Over IP) company and identifies the factors governing it's success in relation to Cultural Intelligence (CQ).

Current research on virtual teams tends to focus on time management and shared goals as the factors that affect team performance (Pazos, 2012). Little attention is given to cross-cultural attitudes and how they affect performance and team resilience.

However, current research on Cultural Intelligence has recently identified an experiential management framework and methods of training that increases CQ within organizations (MacNab, 2012). Still research to date on CQ has not addressed the unique needs of virtual teams.

There is a gap between current research on virtual teams and current research on CQ. This study bridges the gap by examining the process that a leader of a virtual team underwent to embrace team members of a foreign nation thereby establishing trust and, significantly, a highly successful team.

Method

For this case, I interviewed four people involved in a virtual team in a software development company. These included the Director of Verification (Franco[i]), the Team Leader of the virtual team (Suzanne), and two members of an Indian outsourcing company (Vijay and Daksh), based in New Delhi. Each interview lasted approximately an hour and was conducted face-to-face.

Virtual Teams

Virtual teams are increasingly a part of both corporate and academic realities. The term "virtual" meant "effective because of certain inherit virtues or powers". According to Merriam Webster, there are several modern interpretations of the term, two of which include:

1. being such in essence or effect though not formally recognized or admitted <a *virtual* dictator>
2. being on or simulated on a computer or computer network <print or *virtual* books> <a *virtual* keyboard>: as
   > *a*: occurring or existing primarily online <a *virtual* library> <*virtual* shopping>
   > *b*: of, relating to, or existing within a virtual reality <a *virtual* world> <a *virtual* tour>

In the first case, there is a sense of "as if", not quite real or believable. The second clearly identifies with the use of a computer network, or communications between computers.

Virtual teams have tended to be elusive constructs, despite their widespread use. Lack of familiarity with the inherent processes and possible outcomes by those who are not a part of the teams can have negative consequences. This is also true within the Academy where specific studies about what makes virtual teams effective are sparse.

Virtual Teams

Current research suggests that a collectivist orientation is associated with more favorable impressions regarding global virtual team processes and those cultural differences are not concealed by virtual means of communication (Mockaitis, 2012).

Research on leadership is catching up with virtual teams. There are findings which are both consistent with traditional leadership theories and some which deviate. In 2011, Al-Ani, Horpool, and Bligh conducted a study across Fortune 500 companies whose findings suggest that, "team leaders play an important role both in structuring group tasks and supporting socio-emotional group processes, and these functions vary by team distribution level. The idea that distributed teams are particularly conducive to more non-traditional forms of leadership also appeared as a consistent theme. In virtual teams"

The ability to embrace cultural differences is one of those non-traditional forms of leadership that has emerged as a key leadership strength in leading virtual teams. This doesn't meant that it's simple though. Researchers have established that differences in nationality had a strong negative direct effect and that they interacted with differences in technical experience to affect creativity (Martins, Shalley, 2011).

How does a virtual team that spans national, cultural, and time-zone differences harness it's creativity to attain a higher performance status while respecting cultural and national differences?

The Case for Verification at a Distance

VoiceUP has a head office on the East Coast of the USA, with global offices. To maintain it's market position, VoiceUP has purchased several organizations with software development capabilities that complement their prime offerings. VoiceUP has 800 employees in 11 locations with an additional 6 Sales offices around the globe.

In 2006 the Director of the Software Verification department, Franco, who lives in Montreal, Quebec, was informed that he would have a team working with him based in India. When I asked him what drove this business decision, he said that "Outsourcing was on a checklist at that time, it was trendy", he said . X The numbers, he explained, spoke for themselves. In comparison, "they could hire three verification Engineers in India for the price of one verification Engineer" in North America.

At that time, his department was composed of 15 people all living in Montreal. When he discussed the initiative with his team "they were terrified that they were all going to lose their jobs". The reaction was unanimous across the team.

Many members of the team had previously worked for an International telecommunications company that also had outsourced verification to India. In that case they did all eventually lost their jobs and the organization subsequently went into bankruptcy; to those employees the experience was personal and their interpretation was that outsourcing was a precursor to job loss.

Franco had his hands full in assuring his team that they wouldn't lose their jobs. Only then could he bring them together to decide how to best utilize these new, distant but not foreign, resources.

In the six months that led up to this corporate initiative, one of the team members had begun an "automation" initiative, whereby software verification tasks that could be automated and run on their own were identified and coded. This initiative could easily be cost justified and it proved to be a critical success in an environment where the software was growing in complexity and his resources were levelled out.

After much discussion, it became clear that the Indian resources could assist in the automation initiative because the test cases could be reviewed and controlled from a distance. The only person working on that initiative, Suzanne, became responsible for their work.

Hero's Journey

Suzanne is a native Quebecois, with French as her maternal language. Suzanne's quest was formed through a commitment to make the team successful:

"We decided as a team that it made the most sense to assign them the automation responsibilities because we could control it effectively. To automate, we have to write all the test plans first and I could review them. Until then I'd been the only one. When it was decided that it was automation, they became my team – and my responsibility."

Responsibility. She decided she wanted it to work.

This was the first time she had managed people. It was a real challenge for her. But her commitment was palpable.

In the Fall of 2005, two members of the team from India came to the Montreal offices for product training. "The first time 2 people came from India for training and I wouldn't talk to them (she says with emphasis)." She was embarrassed by her own poor response.

As if to demonstrate her lack of commitment she added, "I started the automation by email" and shrugged.

"Slowly I realized that we were stuck with them."

In April of 2006 Suzanne went to India. "It was so warm. It was chaos. I cried and cried. I just couldn't.... I was tired and overwhelmed by the chaos." That trip she was in India for just over a week. She was destabilized and felt extremely vulnerable. And to make matters worse, "I hated Indian food".

Slowly she opened herself to the human beings in front of her. "But then you meet people. It makes all the difference. They have a light in their eyes. They are people like you and me... I've come to understand them. They have studied, they have dreams and they want a life for their family. They are just like us."

Suzanne has led the team for the past six years. "And now I'm an ambassador for India. I try to understand their culture. Facebook helps me connect with them. Facebook is a working tool for me. I can have a coffee with them on Facebook. On Sunday eve I check in to Facebook, check out their pages, make comments on their weekend. And when I speak with them on Monday we have something to talk about, their lives. I ask questions about their lives. I have credibility. It's not just words, it's what I do."

Challenges

I asked each of the participants in the study what their top challenges were. Communication and process were challenges that were shared by all. Communication included both technical media (e-mail, instant messaging, and so on) to make up for face-to-face contact as well as the challenge of interpersonal relations at a distance. Process included both ways of working as well as quality expectations and timelines.

The staff from Matrix India cited collaboration as a challenge that was critical to the team's success. The issue of compromising on time zones was often cited as an example of how they had learned to cooperate and collaborate.

Yet, none of the participants named cultural or national differences as a challenge. Significantly those interviewed did not speak of these factors as challenges but as differences that could be discussed.

Differences

In this case, it's been useful and productive to talk about different ways of being and working explicitly. For Daksh the synergy created by differences has been generative. He's learned from working on a virtual team with others on the other side of the world. "Our ways of working are different from North Americans:

- We are not so prompt to do things.
- We have more meetings in India.
- Shifting priorities is difficult for us.

I'm interested in learning new things and new ways of learning so this is interesting."

Explicitly naming differences has created a learning environment for the team.

Importantly however , ways of perceiving differences can in themselves also be a source of conflict.

Conflict and Culture

"Cultural perceptions greatly influence sources of conflict in virtual teams" (Franco). Suzanne identified one of the managers in the Indian team as, "a real pain". Essentially, he was "micromanaging and making their lives miserable". She said that cultural perceptions (hers) were influencing the dynamics of the conflict. She believed of him that "he was just managing. He wasn't doing any work. That's why he had the time to micro manage them. Here, we manage and we do a full load of work."

In comparison, the North American team had come from a legacy of layoffs in the traditional telecommunications business. Organizations that evolved from this origin are much flatter than their predecessors.

The culture of organizations is also significant. The perception of Daksh was that Matrix India creates a culture that encourages collaboration. "Matrix India uses (the) Agile methodology: daily scrum meetings, no hierarchy, no partitions, everyone is at the same table, makes it easy to communicate. They can look over each

other's shoulders and make suggestions about what each other is doing". In comparison "the Montreal offices are boxed up; there is a lack of communication. (It is) better to have Agile. (You can) feel the energy of the team and add into it. Respond to it. It's more collaborative. Here everyone is focussed only on their own work."

With these apparently polar opposite working conditions, the leader is challenged to create the conditions to make these conflicting environments harmonious, so that the team can thrive.

Construct of a Team the Shines
When I asked the Matrix India participants about conflict on the team, they made it clear that conflict wasn't an issue because of their team leader. In the words of Daksh, "Suzanne is so amenable. She is always ready to help. (Before coming to Canada where we spoke) I had previously met her once. She is well prepared and always takes care of team members." Vijaywas willing to provide examples, "Suzanne is like a little mother. She told us that she was going to be like a little mother to us when we came for this trip. She brought stuff in the morning for us. Gave us a briefing before we went to visit Quebec (city). She has made sure that we try different foods while we are here. She looks after us so well".

Clearly, the team feels supported by their team leader.

I queried them further about how they are successful.

Transparent Processes and Expectations
All of the team spoke of the need for transparent processes and expectations. Both Franco and Suzanne described to me the length to which they have gone to document the work processes the team relies upon to do their work. The Matrix India staff, reiterated that these were top-running "had to haves" to make the team successful.

Aside from email, one of the innovative emergent tools that they have used to share these is what Franco (according to Suzanne) called "WIKI for Dummies". They use a WIKI to share each of the processes, dates, goals, hints, and tips to do their jobs well.

Also, Suzanne shared with me that she had learned from Franco that you can be a demanding manager "if you are fair".

Communications
In addition to fairness, the use of communications media is vital. All of the participants were aware that Instant Messaging tools, were even more important than email. Because they are "live", they provide a sense of "real" interactions – at least in real-time.

Social media, as Suzanne described, provides a social-bonding platform for the team.

Social media provides a higher degree of context for the relations on the team. But to truly create a convivial environment, flexibility was cited as an important factor.

Flexibility
Most of the team concurred that flexibility is a key ingredient of virtual teams. This is especially significant when it comes to differences of time zones, but is certainly not limited to time. To accommodate the difference in time, the staff from Matrix India is permitted to take their calls from home to attend meetings and the Canadians take the weekly call at 7 AM, with some of them are at home and some of them are in the office at that time.

Openness and Cooperation
Flexibility came up as well in relation to cooperation. The Matrix India participants both made it clear that being asked to participate in decisions that affect the project showed that their work and opinions were being respected. "Process should be discussed. The Client should treat the service company as part of the team. They should not just have the attitude that says 'I am the boss', but should interact. There needs to be an open culture (where all members of the team) directly communicate."

Implications: Coaching for Virtual Teams
This case has revealed that a shift of the team leader's worldview created the conditions for a highly successful virtual team. The checklist of techniques that have maintained this success are detailed below as a checklist.

A Checklist for Establishing Virtual Teams:
Flexible management style

Transparency of processes

Processes documented and shared

Communication channels:

 Instant Messaging

 E-mail

 Social Networking (Facebook)

 WIKI

The checklist confirms what many have previously identified in empowering virtual teams. Communication, shared processes, stated goals, and objectives and clearly delineated job junctions are all essential to a highly effective virtual team.

This case has shown though that none of these are possible without a commitment to culture and a worldview that includes and appreciates other ways of seeing, being and doing in this, (our) world.

What is interesting about Suzanne's cultural process is that she experienced a transformation from a single reality to a multiple realities. This confirms what previous research has established (Hovey-Minichiello, 2003) that the journey to inclusion lies in the ability to expand one's worldview to appreciate and respect that and those of others …much as one would the shared perspectives of a family or clan .

With the support of this case, we have direction on how to create the conditions to support this type of transformation.

 Transformative Coaching has gained prominence in both the literature of Management Studies, as well as in the marketplace.

Short-term goal creation is the key to successful coaching interactions.   In terms of cultural IQ, the short term coaching goals for Team Leaders of virtual teams are:

- Ability to commit to the success of the team
- Ability to experience the food, culture, ways of being of others from another culture
- Ability to engage with the lives of people from another culture
- Ability to embrace others from another culture: appreciate, respect other cultures, and care about other people
- Ability to give appreciative feedback
- Ability to behold common dreams and aspirations of others from another culture
- Ability to demonstrate integrity through acting upon spoken words
- Ability to act as an ambassador for another culture

Summary

The ability to engage in multiple cultural (and national) practices is a key capacity for leaders of virtual teams. With this capacity teams can create a container for productive, efficient and highly effective performance. Transformative Coaching provides a structure to develop these capacities,

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[i] The names of the organization, as well as its members, have been substituted at their request.

Transformative Learning and Identity
Knud Illeris

Abstract

Transformative learning has usually been defined as transformation of meaning perspectives, frames of reference and habits of mind – as proposed initially by Jack Mezirow. However, several authors have found this definition too narrow and too cognitively oriented, and Mezirow has later emphasized that emotional and social conditions are also important. So there is a need for a broader, more up-to-date and still significant definition. This paper suggests that the target area of transformative learning should be defined by the term of "identity" and argues why this defintion is today more relevant than the terms which have been usedtill now.

Introduction

The aim of this paper is to discuss the issue of transformative learning in relation to the late modern conditions of identity development. According to Jack Mezirow transformative learning is defined as the transformation of the learners' meaning perspectives, frames of reference and habits of mind (e.g. Mezirow 2006). However, various other contributors to the discussion of transformative learning have noted that this definition is too much focused on the cognitive elements of the mind (e.g. Cranton 1994, Dirkx 1997, Kegan 2000), so there seems to be a need for a new and broader definition of the target area, including the emotional, social and societal dimensions.

Having worked with the connection between transformative learning and general learning theory for several years (e.g. Illeris 2004, 2007), I have come to the conclusion that the concept of *identity* is well suited to meet this need as it includes both Mezirow's formulations and the person and the human mental core dimensions as a whole. So I shall in the following give a short general introduction to the contemporary understanding of the concept of identity, how it is used and discussed today, how it relates to transformative learning, and give som examples showing how these two concepts can be enriched by being brought together and seen in relation to each other. It is in this connection assumed that the readers of this paper are already familiar with the concept and practice of transformative learning.

The concept of identity

The modern understanding of the concept of identity is usually ascribed to the German-American psychoanalyst Erik H. Erikson, who defined it as a combination of the personal experience of being the same in all the different situations of life and how we wish to present ourselves to others. Thus the concept has both an internal psychological side and an external side referring to our relationship to other people and the outside world. According to Erikson this identity is mainly developed during the life age of youth and maintained as a core of the personality for the rest of our lives (Erikson 1950, 1968).

But already during the 1970s the stability of the identity began to be questioned. In clinical psychology symptons such as lack of self-perception, feelings of emptiness, of not really existing, lack of job satisfaction and initiative, absurdity and an increased tendency towards routine behaviour turned up (e.g. Kohut 1971), and later the psychological approach of social constructionism more consistently claimed that qualities such as identity, meaning, attitudes and understandings do not exist in the individuals, but only in the interaction with others (e.g. Gergen 1991).

However, the most thorough renovation of the understanding of identity today was launched by modern sociology, fundamentally demonstrating that it is not possible to develop and maintain a stable identity in a world, which has the nature of what the Polish-British sociologist Zygmunt Bauman called *Liquid Modernity* (Bauman 2000). The German sociologist Ulrich Beck described how de-traditionalization and indvidualization have undermined the ideal of a stable identity (Beck 1992 [1986]). And the British sociligist Anthony Giddens claimed that identity is today constantly streched out between the need for the fundamental experience of having a coherent existence, and threat of feeling unable to realize and express in any balanced way who one is. Thus identity has the nature of a "reflexive project", implying a constant necessity to change in order to maintain the feeling of being one self, a balance between stability and flexibility, between being one self and changing one self (Giddens 1991).

Identity development today

For the new generations growing up since the 1980s the task or duty of creating, maintaining and changing their own identities has become more and more important and fundamental. Who am I? Who do I want to be? How can I fulfil my dreams? For some possibilities may be great and never-ending. But for others the many choises can become a strain, a continuous demonstration of their insufficient individual capacity to make things function. It is very difficult to obtain so much contact with one's identity that it can be a yardstick for making the right choises when things are changing all the time. Identity development has today become a central issue, at the same time being very complicated, dealing with the most significant and decisive linking between the individual and society, and therefore also of crucial importance for the understanding of learning in general and of transformative learning in particular.

The structure of identity

When dealing with the concept of identity as a target area for important learning processes it becomes essential not only to define and understand the nature and the current role and position of this issue, but also to have a notion of its structure and main elements.

The core identity

First of all there seems to be a general agreement – except for the most hard core social constructionists – on the existence and central position of what has been called the core identity, the self-identity or the biographical identity, which "normal" people actually do what they can to develop and maintain in spite of all tendencies of instability and fragmentation.

The American psychoanalyst Daniel Stern has shown how the basic elements of the core identity are established already during the first months of life when the infant experiences to be a separate being, and how this core is gradually supported by a growing amount of individual experience (Stern 1985). Later the young child discovers other fundamental identity elements such as gender, family relations, environmental conditions, appearance, characteristics, temperament, desires, emotionality etc. and an idea of being a unique and specific person takes form. When fully developed by the end of youth, this core unit is generally stable, but it is distinctive that in "liquid modernity" important changes happen considerably more frequently than ever before, and almost all adults will come into situations in which changes in the core identity are relevant, required or necessary.

However, there are also other elements of the identity, which can be thought of as layers situated around the core. I shall here shortly introduce an understanding in which identity has two more main levels, which can be termed the personality layer and the layer of preferences.

The personality layer

The personality layer is in contrast to the core not so much about the relationship to one self, but rather about how one relates to others, to communities and groups, important issues and instances, significant events and incidents – altogether to the outside world, society and environment of which one is a part. Evidently the demand of being able and willing to make changes in this part of the identity has grown rapidly during the later decades by radical changes in both the life situation in general and all sorts of technical, organisational, political and private changes in everyday life – one only needs to open the television or the computer in order to be met with new events, situations, conditions, rules and regulations, ideas, claims and arguments, things to discuss, to decide on, to relate to, to have a meaning about. It is also in this area we find what Mezirow has referred to as our meaning perspectives, frames of reference and habits of mind. It is a layer in which we are usually willing to make changes if there are good reasons for them, but on the other hand it is not matters which we change without being convinced about the relevance and suitability of the new content. Thus in general the demands for and the relevance of transformative learning as this expression is usually understood and defined are very much concentrated in this identity layer.

The layer of preferences

Further, the identity also includes a more peripheral layer which can be termed the layer of preferences. Here we find all the many things and issues which we meet in our everyday life, which are meaningful and of some importance to us, but certainly not crucial matters. It is about how we do all the many things we are used to do, our routines, our more or less automatic reactions in different situations, what we say and how we say it, what we instantly feel in and about all the many everyday situations we deal with but are not very committed to. In this layer we find most of what Mezirow has termed meaning schemes, and generally changes in this area are not so dependant on what we feel and mean, but rather whether we actually have the energy to change. We are not so committed, but it is all right if the reason for a change is acceptable and we are able to put ourselves out to do it.

Part-identities

Finally, it shall be mentioned that the above is related to what is usually understood as the personal identity. There are also other identity areas such as the work identity, the family identity, the national identity, the religious identity etc., and each of them contain the same types of layers and can be analysed in similar ways.

The general picture is that the identity is a complex structure and that our inclination to make changes in elements of the identity mainly depends on how close to the core identity the changes subjectively are experienced to be.

Identity, life age and transformative learning

The concept of transformative learning has always mainly been used in relation to adults, but obviously there must be a development through childhood and youth which sets the scene and conditions on which the transformations take place. Relating transformative learning to changes in the identity can give access to a more detailed understanding of how this development takes place, of which I shall here give a short summary.

Identifications in childhood

As already mentioned Erikson related the development of the identity to the age of youth, and the various mental formations in childhood which paved the way for this development he regarded as "identifications", indicating that they relate to what the child has taken over from others. Therefore real transformative learning cannot normaly take place in childhood.

Identity development in youth

The identifications of childhood do not obtain the qualities of identity elements before they have been personally elaborated and acquired through the youth identity process. This implies that the identity development in youth is of great importance for the individual possibilities of transformative learning in adulthood. This development, as it takes place in liquid modernity, has most thoroughly been studied by the German psychologist Thomas Ziehe (2009), but I have also myself been involved in this in relation to the topic of learning in youth (e.g. Illeris 2003, 2007).

It is here significant that the identity development starts in early youth by the age of 11-13 with so-called search processes, i.e. an advanced kind of trial-and-error learning in which a lot of more or less diffuse drafts of behaviour and understanding are tried out, gradually adjusted, often turned down again, and new ways are constructed – a process which can be very confusing and demanding for both the young girls and boys themselves and for their peers, parents, teachers and others. However, gradually more stable attitudes and ways of behaving and acting are taking form and, usually from about the age of 18, it is possible to identify provisional elements of identity – whereas a full identity with a practicable balance between stability and flexibility today is usually not obtained until in the last half of the twenties.

Thus youth is today a lengthy life age, lasting about 15-18 years. But with the importance of individualization in liquid modernity this seems to be necessary for both the individual and society – as individualization implies the ability to make choices, not only of what to buy and to do, but also of behaviour, lifestyle and identity. Transformative learning then is the corresponding means of development and learning concerning the various elements of the identity. But transformations cannot be made before there is something relevant to transform. This something is gradually established during the long period of youth, and along with this the possibility of transformative learning is gradually developed, first as very unsteady trials, but gradually as more consistent thinking and behaving. To deal with transformative learning in youth is both important and demanding, for the learners as well as those who try to help and support them.

Adult identity and transformative learning
Motivation, defence and competence development

In adulthood motivation becomes a very central issue in relation to possibilities of changes in the identity. The kind and strength of the motivation involved is crucial – adults do not transform elements of their identity if they do not have serious reasons to do so. These reasons may be internal, external or both – but analytically the important thing is that transformations imply a strong motivation and cannot be expected to occur without this. As most teachers, instructors, managers or supervisors consciously or unconsciously are aware of this, they try to motivate their students, employees or clients. But in doing so they often make the mistake that they try to create motivation instead of finding it – not realizing that a motivation which is strong enough to trigger transformative learning must be deeply rooted in the person and cannot just be created or imposed (cf. Illeris 2007). The central challenge of promoting transformative learning is to find and connect to the psychological or practical potentials in the learners' existence and life world which are so strong that they can justify the exertion af a transformation.

It is also important to be aware that all learning, and especially demanding learning, very often will have to overcome learning barriers in the form of defence or resistance. In liquid modernity we are all confronted with so many new situations and learning possibilities that we have to protect ourselves against being overwhelmed and destabilized by constant change. We therefore develop a learning defence which is partly unconscious and automatic. We cannot take in all laerning possibilities, and not even overcome to consciously decide which to take in and which to refuse (cf. Illeris 2007). A specially strong part of this defence system is the identity defence, which protects us against too much transformative learning. This must be accepted, understood and respected – and again, the way to deal with this is not to impose certain crafty methods and activities, but rather to try to detect whether the learners actually have any interest in the intended transformations and if so, where these interests are subjectively rooted and how they can be addressed.

Finally, it shall in this connection be mentioned that if and when genuine transformative learning comes through we have to do with the kind of learning processes which really open up for learning which can truly meet the buzzword of competence development when changes of mind and behaviour are followed by more concrete changes of understanding and acting.

Progressive, regressive and compensatory transformations

The connecting of transformative learning to the concept of identity can also draw attention to the fact that not all transformations are progressive. Of course, the aim and idea of transformative learning is basicly to overcome personal limitations and difficulties and develop qualitatively new possibilities. But sometimes it becomes important and necessary to realize that progressive transformations can be too demanding and challenging for the learner, so that the outcome rather becomes withdrawal or regression – which can actually also be a kind of transformation. In my practice in adult education I have been involved in several cases in which intended transformations appeared to bee too much, but realizing this was certainly also a transformative experience. Some of these cases also involved that the learner set new and more realistic goals which implied what can be called compensatory transformative learning (cf. Illeris 2006).

Concluding remarks

Seen in relation to the issue of transformative learning the concept of identity is obviously of interest as meaning perspectives, frames of reference and habits of mind are all important parts of the identity. But identity is more than this as it is spanning all the three dimesions of learning and mental processes: the cognitive, the emotional and the social, as well as the environmental and societal situatedness of all of this (Illeris 2004, 2007).

However, today the matureness and stability to which these mainly cognitive concepts were connected are still important positive values, but they are also to some extent in contrast to the notions of continuous growth and flexibility, which have become dominating ideals. One may regret this change, but it cannot be neglected or denied. Anyway, it is important and generally accepted that the non-cognitive mental dimensions must be included and taken seriously into account, for example when jobs and positions are advertised or in the daily interaction between people.

So the critique that Mezirow's notion of transformative learning is too strongly cognitive oriented when seen in relation to contemporary life and work conditions is well established and has also in general been accepted by Mezirow himself (e.g. Mezirow 2006, 2009). In his writings he has for several years carefully mentioned that emotions and social relations are also involved in the transformative processes. But at the same time he has maintained meaning perspectives, frames of reference, and sometimes also habits of mind as the target areas of transformative learning, so that emotions and social abilities have got a position as a kind of concomitant phenomenons, something that is involved in transformative learning, but is not really what it is about. And in the general notion and understanding of transformative learning, though often mentioned and generally accepted, the inclusion of other dimensions than the cognitive has not really come through as equal elements.

What is needed seems to be another, broader and more inclusive concept, which covers all the mental dimensions and can function as a general and coherent term for the mental target area of transformative learning. And this is, as I see it, precisely what the concept of identity is suitable for, both because it actually covers all of the relevant field, and because it has through the latest decades inside both psychology and sociology become the generally accepted term for the central areas of the personal mental field.

As a consequence of all this, I think that a sort of agreement or common notion on accepting and using the term of identity, including the cognitive, emotional and social dimensions and elements, and understood as the general link between the individual and its practical, cultural, social and societal environment, will be both an appropriate and up-to-date opening and expansion of the approach and practice of transformative learning.

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Triggering Self-Reflection and Informal Praxis in the Greek Public Sector Through Adult Training

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Abstract

The present article presents a case of adult training which aims to induce informal praxis across public agencies in Greece. The trainer adopted critical thinking practices to foster self-activation for high rank employees of public agencies toward confrontation with emerging difficulties due to the financial crisis of the country. The method is based on transformative learning principles leading to bottom-up extraction of innovative actions which may lead to good practices. Results are indicative for change in certain perspectives which are predominantly sociolinguistic due to cultural features of the Greek population. The overall process is summarized in a comprehensive framework which pertains to deviation from hierarchical decision making.

Keywords:

Public administration, financial crisis, self-activation, transformative learning, praxis

Introduction

An ongoing financial crisis is experienced across the globe since 2008. Greece has been a foremost country to face the macroeconomic consequences of the crisis under the administration of both European Union and International Monetary Fund (IMF) – i.e. the EU/IMF troika. Greek citizens face a high deterioration of their income along with an unprecedented rise of the unemployment rate (more than 20%) – the so-called *Greek debt crisis* case. The public sector of the country is given special attention as thought a certain source for economic deficiency. Hence, public funds have been continuously reducing with troika's guidelines for further diminution. In this way, Greek public agencies struggle to provide their services.

In the context of critical pedagogy (Giroux, 1983; Shor, 1992), adult training cannot be neutral to social circumscriptions. According with Freire's (1986, p. 36) definition of *praxis* as "*reflection and action upon the world in order to transform it*", adult training may be thought as an emancipatory process to comprehend a situation and react on it. Mezirow's (1997, 2000) transformative learning theory shares the same perspective relied on critical self-reflection – i.e. critically questioning own assumptions, beliefs, and values. Perspective transformation is higher order learning due to awareness and reconsideration of a person's deep beliefs which sustain problematic frames of reference and dysfunctional meaning schemes. Cranton (1994, p. 51) distinguishes three types of meaning perspectives: the *psychological*, the *sociolinguistic* and the *epistemic* ones. All these perspectives may undergo transformation through critical self-reflection since transformative learning is a holistic approach in learning. However, the present work focuses on sociolinguistic meaning perspectives of Greek citizens as they are closely related to the financial crisis situation of the country. Hence, the basic question for this study is *could an adult educator trigger self–reflection toward self–activation and praxis in the Greek public sector*? What could be expected from such a process and how it meets the hierarchical decision making in these agencies?

In the sequel of the present work, we initially refer to sociolinguistic perspectives relevant to dysfunctional dilemmas due to the financial crisis of the country. Then, transformative learning theory is employed to present and discuss a leaning case from typical training of upper level employees of Greek public agencies. The learning activity was replicated to an adult educators group for result triangulation purposes and the findings are presented and discussed. Finally, the results are projected in a comprehensive framework relevant to hierarchical decision making of the Greek public sector.

Sociolinguistic perspectives in contemporary Greece

Sociolinguistic perspectives are essential in communicative learning. Cranton (1994) defines sociolinguistic meaning perspectives as "*perspectives and assumptions derived from our culture, community, and social background, including the use of language in our culture*". According to anthropologist scholars, a

series of attributes are thought to historically explain the cultural identity of cotemporary Greek citizens. Most of these features shape habits of mind, points of view and practical confrontation with everyday problems.

Diamandouros (1994) addresses the Modern Greek cultural identity to reasons that can be rooted to the Ottoman Empire. At that period, an expanded perception of the state began to gradually evolve and the conception of ethnos infused the conception of the state. Hence, an *obsolete* culture evolved by adopting habits of mind which tend to ignore the essential role of institutions in regulating power relations. That biased culture also undermined the confidence toward exploitation of institutions as ancillary structures of a society of active citizens.

Katakis (1984) highlights another attribute emerged in early Greek state (i.e. mid–19th century): the role of the family. In the early state, the ancient institution of the community and its possible interactions and interdependencies was dissolved as it was confined into smaller human teams/units – the "broad" family. Consequently, *atrophic* family logic was adopted creating a strong feeling that orders any societal conduction – i.e. the person has been predominantly liable to his/her family.

Focusing on recent Greek history, Tsoucalas (1991) argues that Greek Civil War (mid–20th century) shattered the fragile credibility of collective social imperatives, because groups of power seemed unable to approach a coherent collective target with positive and future–oriented values. As a result, "*Greekness*" is thought to consist of a mass in which each person indiscriminately promotes his/her interests, realizes his/her wishes, defends his/her well–being and seeks personal comparative advantages. In sum, relations of the Greeks to the social environment tend to qualify insecure narcissistic desires leading to irresponsibility, aggression, authoritarianism and anomie not even daunted by law or consciousness.

Another inherent attribute of modern Greeks, probably related to religious reasons – centuries ago, has been discussed by Ramfos (2011). This refers to the Greeks' perception of time. An observed irresponsibility is deeply connected with passivity as long as Greeks' perception of time remains passive. According to the scholar, time can produce *new forms of time* through the constant process of creation trying to build eternity and acting through time itself. But in the above mentioned obsolete culture, time is paranormally understood as a "closed system" in which temporality is enclosed resulting to postponement and idleness. It can also be identified that persistence in the past and distorted relations with tradition lacking potential lead rather to an answer–oriented than a question–oriented culture. Thus, image perception is created through "others" and not through the "self". Furthermore, attitude towards public sphere is hostile and patrimonial features persist creating a vicious circle in which the more the state fails to modernize the more anti-developmental features it obtains (Mouzelis, 1996). Evidently, the perspectives presented in this section hinder self-activation which is the core-idea of the present study.

The previous analyses delineate features of modern Greeks. Independently from a consistent construction of the Modern Greek cultural identity – seen from different perspectives – there is also empirical evidence for such features. For example, an ongoing longitudinal survey (European Social Survey, 2009) indicates that social solidarity in Greece appears far below the European average, a sense of growing insecurity and aloofness penetrates interpersonal relationships and their attitude as citizens as well. An increasing individuation, followed by a respective "phobia" of others is eminent. Satisfaction related to institutional dimensions of life appears in extremely low levels with Greek citizens showing a rather self-interested exploitation accompanied by a sense of pervasive injustice, lawlessness and indiscipline.

Transformative leaning toward self-activation in a crisis period

Mezirow (2003, pp. 58–59) defines transformative learning as "*learning that transforms problematic frames of reference — sets of fixed assumptions and expectations (habits of mind, meaning perspectives, mindsets) — to make them more inclusive, discriminating, open, reflective, and emotionally able to change*". Transformative learning follows ten phases (Taylor, 1998): a disorienting dilemma; self–examination with feelings; a critical assessment of assumptions; recognition that one's discontent and process of transformation are shared and that others have negotiated a similar change; exploration of options for new roles relationships, and actions; planning of a course of action; acquisition of knowledge and skills for implementing one's plans; provisionally trying out new roles; building of competence and self-confidence in new roles and relationships and finally a reintegration of new assumption into one's life on the basis of conditions dictated by one's new perspective. The first five steps concern reframing and preparation for praxis which follows in steps six to ten.

An adult educator decides to follow transformative learning when a disorienting dilemma appears (first step). In the example we present in this article, learning disorientation dues to the financial crisis consequences. The dilemma can be easily revealed in most adult learning courses; however, it depends on the educator to foster

critical reflection. In this case, reflection concerns not only the task of the course but also assumptions, stereotypes and taken for granted hypotheses in the societal context. Thus, critical reflection is adopted in communicative learning aiming to produce irreversible changes in frames of reference of the participants. More specifically, the following training examples question sociolinguistic perspectives of Greek upper level public servants toward transformation and further induction of intentional actions (steps six to ten) in order to overcome problems in their workplaces due to the crisis.

A training course case for upper public servants

The training course "Human Resources Development and Exploitation of New Technologies" was offered by the Greek National Center of Public Administration and Local Government to a group of 20 high ranking employees of Greek public agencies. The course was completed in two phases: a four-day face to face training and a subsequent one-day face-to face meeting after approximately a month. The period between the two phases was used by the participants in order to reflect on and critically study the educational material. They also prepared a written essay related to issues of their workplace. The essays were presented and evaluated during the second phase of the training course.

It was apparent from the commencement of the course that the majority of the participants were constantly bringing about the difficulties they face at their work environment due to the financial crisis and their inability to take actions that would promote communication and cooperation between their subordinates as to improve the overall performance of the organization. The educator followed a transformative learning perspective exhorting participants to express dysfunctional situations at their workplace and reflect on them. The taken for granted hypothesis was that: public agencies will not receive resources or advice from "above" to overcome the crisis. The "from above" process concerns the governmental agencies and bodies in Greece which traditionally provide the vast majority of top-down decision making and guidance.

Initially, participants were asked to spontaneously express the major problems that they are facing in the public sector due to crisis. Once these problems were recorded and summarized, participants were asked to form small groups and try to work together on pointing practical ideas for addressing these problems. Particular emphasis was given by the educator to the ideas that would stem from individuals' taking responsibility and initiatives of the participants in their workplace. These proposals were the outcome of the activity (Table 1).

The specific activity was not a part of the curriculum. The educator adopted it due to the identification of a dysfunctional situation (i.e. a disorienting dilemma) underlying the learning process He encouraged the trainees not only deal with practical and situational issues of their organizations but also discuss the role of the organizations, the environment in which they operate, the interaction with governmental bodies, emerging public needs etc. Rational discourse was followed for the group discussion. In this way, team learning of the specific activity followed the critical thinking school (Marsick and O'Neil, 1999).

Replication of the activity for adult educators

The same learning activity was offered to a group of adult educators in Greece. The group consists of about 25 persons who specialize on critical pedagogy and transformative learning. Most of them work in the public sector (secondary education schools, adult training organizations, universities, etc.). More than half of the group's population are high ranking employees in their organizations. Thus, the second group was considered similar to the first one with a certain difference in the level of expertise on critical pedagogy. The participants were asked to: (a) individually reflect on consequences of the crisis in their workplaces, (b) form small groups and discuss it. After the summary of the problems, the same groups were asked to: (c) suggest initiatives to overcome everyday problems in their organizations. The whole process lasted for three hours and the outcome is shown in Table 1.

The replication of the activity was performed for result triangulation purposes. Participating in the activities of the group for more than two years, we were aware about the concerns for the consequences of the crisis in educational workplaces. Thus, it was easy for the specific group to perform the critical thinking activity in a three-hour meeting.

Results and discussion

In Table 1, both problems at the workplace (left column) and suggestions for initiatives to overcome difficulties (middle column) are summarized. Statements are grouped for each team (right column) with a common set of overlapping propositions.

Workplace difficulties associated with the crisis	Suggestions / initiatives	Group

Staff downsizing Reduction in funding Mandatory changes in strategy, processes / reformations Moral decline	Staff training Exploitation of experience Participatory decision-making	**Group A** (high rank employees)
Compulsory changes in job profiles Increasing demands from employees Salary reduction Uncertainty	Hierarchy of problems / needs Team formation and collaborative spirit Boosting morale through a new vision Strengthening of solidarity and interpersonal relationships Networking	**Common** (A and B)
Operational problems Chaotic changes Ominous future Interpersonal relationships Decrease in quality of life Need for a new equilibrium Outdated statutes	Limits in employees' tasks Re-distribution of responsibilities Encouragement of creativity Sense of humor Reformation of collective bodies Identification of the organization's mission Activation of the institutional frameworks	**Group B** (educators)

Table 1: Summary of The Identified Problems Due To The Financial Crisis (Left Column) And Suggestions (Middle Column), For The Two Different Participating Groups (Right Column).

Concerning the problems, income reduction along with new "top-down" demands from staff to confront with a changing and uncertain situation describes the dilemma for both groups. Group A emphasizes more on managerial aspects as: staff downsizing, decrease in resources, changes in organizations' strategies and moral decline. The educators' group (B) concentrates more on humanistic and social issues as: interpersonal relationships, decrease in the quality of life, ominous future, insufficiency of statutes etc. Clearly, the crisis impacts workplaces in the public sector making people inconvenient with the current conditions within their organizations. The phrases they use to describe the problem meet the expected socio-cultural attributes about the obsolete culture, top-down decisions, idleness, poor confidence to the institutions, presented in section two. Differences between the groups are understood as resulting from differences in their workplaces: Group A is managerial and administrative while Group B is more humanistic.

Critically reflecting on the previous problems, both groups suggest a reconsideration of the problems and needs asking for a rational classification for them. They recognize the necessity for a morale boosting and a new vision which exceeds the framework in which their organizations operate so far. Solidarity, interpersonal relationships, collaborations and networking are considered essential processes to overcome the problems. Moreover, Group A suggests staff training, participatory decision–making and exploitation of experience which are crucial processes that doubt the existing decision–making and administrative structure of Greek public agencies. The suggestions require more self-activation in contrast with passivity, idleness, adhesion to family and other features of the cultural identity. The educators, Group B, suggest encouragement of creativity, sense of humor, reformation of collective bodies which also require self-activation. They also suggest reformations in the societal frame, as mission statements of organizations and updated institutional frameworks, along with protection of employees' rights, as re-distribution of responsibilities and limits in employees' tasks. The case indicates reframing in the way participants conceive traditional perspectives and structures associated with the Modern Greek cultural norms as they were described in section two.

The possibility for the proposed transcendence relies on *self-activation*. Both groups agree to take action and initiatives in their workplaces to confront with consequences of the crisis. Concerning the ten phases of transformative learning, the present process reaches the fifth one: "*exploration of options for new roles relationships, and actions*". Praxis begins through the sixth step: "*planning of a course of action*" which we are

not able to observe through a follow up process. Nonetheless, we expect the identified willingness to act as a condition for subsequent praxis. Findings indicate induced praxis in two fields: the organizational and the societal ones. The former is predominantly promoted by Group A while the latter is central for Group B. For instance, solidarity, reformation of collective bodies and activation of institutional frameworks are important tasks for social change. The same tendency is observed in many workplaces and can be discussed as one–directional collective transformation due to an unambiguous societal reason

Despite the importance of social change, which exceeds the scope of the present article, we focus on the organizational issues of Group A. Upper level employees are intermediaries between the top level officials and ordinary employees in the hierarchical structure of public agencies (Figure 1). The top-level officials are governmental staff who follow formal decision making in accordance with policies and regulations. Their decisions are risk–averse and are conceived as mandatory by the rest (a "gap" is introduced in the pyramid). Self–activation from upper level employees requires personal responsibility and risk taking. They may receive small–scale decisions and the expected praxis cannot be thought as "formal" since it does not bind the top level structure – i.e. not all initiatives will be successful. The upper level public servants have to experiment with re-distribution of resources, responsibilities, motives, benefits, tools, communication etc.

The high ranking staff has to undertake praxis in collaboration with employees (ovals in Figure 1) fostering a new vision and collaborative framework for the organization. The initiatives have to follow "bottom-up processes" which agree with exploitation of experience suggested from Group A. Thus, successful motivation for self-activation from below, based on own-risks, practical decisions and responsibility, should aim to generate a set of good practices. Afterwards, adoption, enactment and institution of good practices by the top level structure (i.e. the government) are expected. In this way, participatory decision making becomes possible but also difficult as it includes personal risks. In sum, critical instruction may act as a disturbance in traditional decision–making, during a crisis period, able to generate praxis and good practices from below in organizations (Figure 1).
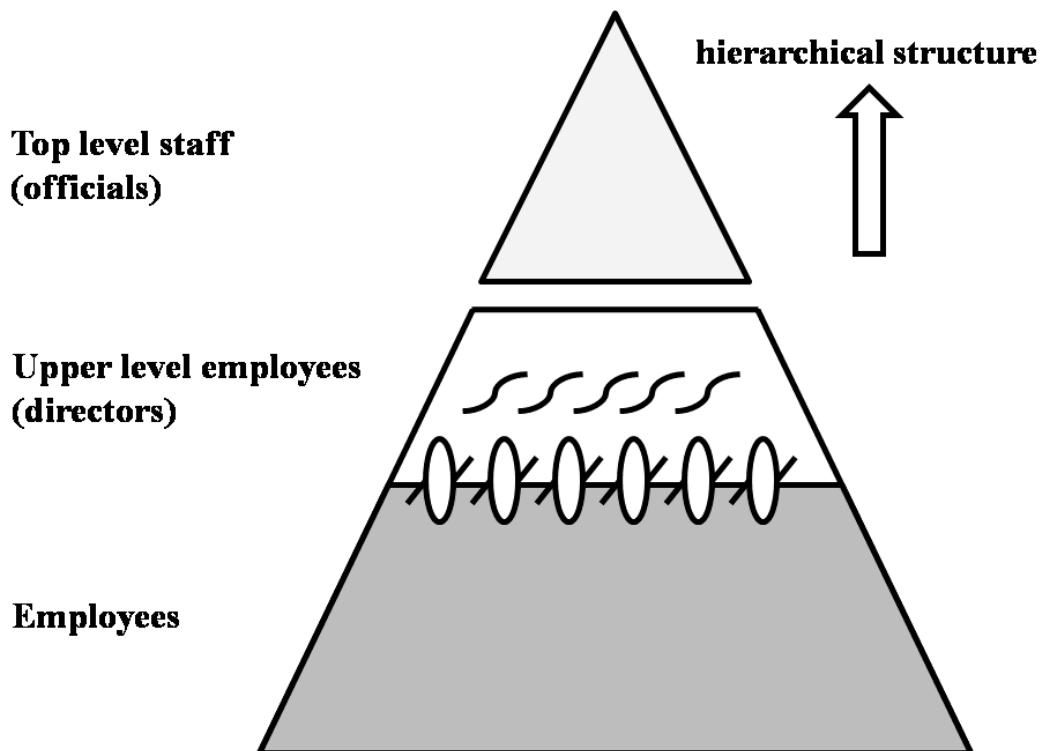
Figure 1: Disturbed hierarchical decision making and action due to critical thinking training of upper level employees (sigmoids). Subsequent induced praxis (ovals) is expected.

Conclusions

In the present work, a transformative learning case for adult training of high ranking employees was discussed. The case study concerns public agencies' staff in Greece who face disorienting dilemmas due to the financial crisis of the country. Through the example, it was shown that transformation mainly concerns sociolinguistic perspectives due to the local culture. Critical pedagogy training is a trigger for self–reflection which leads to subsequent informal praxis within public organizations as to retrieve bottom–up good practices. This process can be further discussed as an organizational innovation facilitated by the consequences of a crisis.

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Reimagining End-Of-Life Care: Transformative Learning Possibilities Within Interdisciplinary Hospice Teams

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Abstract

People may want to transform the ways they work with one another and yet they are held captive by being "caught in their histories and reliving them…" Held back by patterns of communication, of behavior, of expectation, of acting out designated roles one has been groomed to assume. These are a few of the barriers to group learning in the medical arena that affect end of life care. Interdisciplinary team work demands professionalism that may override the authentic and whole person experience required for adult learning. Considerations are discussed in the context of hospice and palliative care.

Background

Dying with dignity should be a basic human right. The end of life is a time filled with opportunity to deeply reflect, to fulfill one's "bucket list", or simply to be held in a space of comfort and safety. The intensity of the individual's experience is magnified by corresponding feelings and experiences of their families and loved ones. The goal of end of life care is to promote the best days possible.

End of life care in United States has traditionally been offered by domains of hospice and palliative care. A trademark of hospice care is the interdisciplinary team, mandated by the federal government's Centers for Medicare and Medicaid Services, obligating fields of medicine, nursing, social work, spiritual care, psychology and others to work closely together in order to provide quality care to people at the end of their lives.

Multiple factors impose challenges on delivering this quality of care. Interdisciplinary team work requires individuals from complex fields of practice to collaborate toward the goals mutually identified by members of the team and the patient and family. Increasing regulations from legislative policy that govern changes in healthcare result in institutional realities that interact with yet more complexity in a shifting societal structure, changing definition of family, and a multinational population with an ever widening trans-national network of family connections. Healthcare providers struggle to navigate this complex web while striving to achieve standards of quality care in their own disciplines, embedded in the respective meaning schemas of their individual domains.

The focus of quality care within individual disciplines has been to help the dying person and her/his families to have the best days possible at the end of life. Hospice and palliative care literature provides a plethora of approaches for quality care, yet the majority of attention is given to quality within individual disciplines. There is not attention given to the needs for collaboration and communication within and amongst the multiple professional domains who are required to provide end of life interdisciplinary care.

As the quality of care is honed in individual disciplines teams are progressively challenged with a lack of models for negotiating their changing environment. In order for the field of hospice and palliative care to actualize the goals of interdisciplinary work, they need to transform their individual meaning perspectives in relationship to the interdisciplinary context. Transformative learning is possible through a critically reflective process designed to assist in the inspection of values, beliefs, assumptions and presuppositions. The power of the transformative learning within hospice and palliative care teams holds the promise of enhancing the singular focus of individual discipline goals and standards of care.

Being confronted with one's own death is a prime example of the traditional definition of a "disorienting dilemma" that might precipitate transformative learning. It is the kind of learning that holds the opportunity for transforming one's deepest held beliefs and embodies endless possibilities for awakening. Professional caregivers work toward assisting the dying person and his/her family in this potentially transformative time. Still, the opportunity for further enhancement of the care provided in the end of life lies locked within the teams.

The Session

The presenters include an adult educator who is also a registered nurse and has practiced in various clinical settings and a licensed clinical social worker with an academic background in cultural anthropology. Both of these practitioners are seasoned in hospice and end of life care and work together in a not-for-profit free-standing hospice agency serving patients and their families in Northern California. Together they hold a rich opportunity for reflection on experience in end of life care and the academic constructs therein.

On initial submission of the session for the 10th Transformative Learning Conference presenters were focused on the problem of unleashing the transformative learning potential within the interdisciplinary team with a hopeful outcome of proposing a model for learning amongst these multiple disciplines. On deeper reflection with the diverse theories and the research needed in the area of transformative learning (see Taylor, 2011) we see expanded goals for the session. We are hopeful of engaging conference participants in a meaningful discussion of the issues at stake, current research models and the needs of the fields of healthcare, interdisciplinary teams and adult education relative to transformative learning.

With the backdrop of a poignant film clip related to end of life issues, practitioners will facilitate an interactive session with case study presentations. Guided discussion will focus on exploring the possibilities of transformative learning as a potential for expansion in understanding between and amongst the diverse domains of human service dedicated to hospice and palliative care and including communication with agencies, governments, and additional diverse entities in the context of end of life care.

Theoretical Links

Even the experience of perceiving of one's own death or the dying of a loved one, for most of us, could be a prime example of the traditional definition of a "disorienting dilemma" which could precipitate an examination of one's meaning schemas (Mezirow, 1981). As difficult as it may be, this is the kind of life event that holds the opportunity for learning and potential for transforming one's deepest held beliefs. Drawing on the work of Maxine Greene it could embody endless possibilities for awakening. Whether or not these events are a crisis depends on layers of expectations of the dying person and loved ones, and a host of related factors (see Jarvis, 2011). These profound experiences of patients and families are shared daily with the healthcare professionals who provide end of life care. It is well discussed amongst end of life professionals that daily contact with the patients and families in and of themselves frequently precipitates significant learning. While staff members are typically "cared for" and encouraged to care for oneself, frameworks for meaning making are more rare.

Society's struggle with our mortality is not likely to be solved by research alone. And yet, the skilled practitioner in end of life care longs for expanded resources in order to assist patients and their loved ones in negotiating these most challenging times of life. Taylor and Snyder (2011) pointed to one potential body of need for expanded research especially relevant to end of life care. In their review of research literature on transformative learning from 2006-2011 they found seven studies that identified a variety of associated issues, specifically relevant they quote Sands and Tennant's (2010) work on the repositioning of relationships among the bereaved "with the deceased, the self and others" (Sands & Tennant, 2010, p.116, quoted in Taylor and Snyder, 2011).

One specific challenge in end of life care, as well as in most healthcare arenas, is the hierarchical medical model. Out of legal and regulatory necessity in quality patient care the physician is the team leader. The challenge in leading the integration of multiple bases of knowledge toward this quality requires a practitioner skilled not only in exemplary medical knowledge, but also the skill to be open to diverse points of view and to access the interdisciplinary knowledge that contributes to the ultimate goals of the patient and loved ones. [see Van Stralen, S. (2004)]. While there is support and mandate for the interdisciplinary team model there is little research on the learning potential within end of life care teams. The interdisciplinary team culture in many ways is a microcosm of the outside socio-culture. The work of Freire (1986) could be useful toward liberating the potential within this culture.

Another significant issue in end of life care is attention to the patient spiritual life, to the extent that US federal regulatory statues mandate a 'spiritual assessment' within the first five days of the provision of hospice care. The field of adult education is giving increasing appropriate attention to the multiple domains in which adults learn

inclusive of, but not limited to the rational, the affective, the somatic and the spiritual or symbolic domains. This area of adult education research is especially pertinent to discussions of end of life care and to the interdisciplinary team approach; in discussion we will invite reflection on the works of Tisdell (2003), Dirkx (1997 and 2011).

The overwhelming topic of group learning is clearly a fundamental component of how interdisciplinary teams might negotiate their learning. The works of Clements, J., Ettling, D., Jenett, D., and Shields, L.(1999), Group for Collaborative Inquiry (1991), Group for Collaborative Inquiry and thINQ (1994), Bray, Lee, Smith and Yorks (2000), Kasl and Yorks (2002), Van Stralen (2002) and others will be a departure for discussion in the session.

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Transcending Rationality: The Transformative Power of a Holistic Group Approach to Educating for Critical Consciousness and Change

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Abstract

This paper presents the findings of a qualitative study that explored roles that expressive practices served in a holistic group learning process, conducted with twelve Sansei[1] women examining their experiences of oppression and privilege. Heron's epistemological framework was used to construct the learning process to engage multiple epistemologies. The findings resulted in a taxonomy that comprises nineteen roles organized into four functions: foster presencing, nurture empathic understanding, catalyze deeper inquiry into experiences, and encourage engagement in expressive ways of knowing. Participants in this session will experience a holistic approach to exploring social justice issues that will be related to this taxonomy.

Keywords

Holistic, multiple ways of knowing, critical consciousness, culture

Introduction

Although much has been written recently about holistic orientations to transformative learning, including its theoretical foundations and frameworks for designing learning experiences that engage multiple epistemologies, little is known about learners' experiences and about how engaging multiple epistemologies can foster learning that is transformative. This qualitative study explored roles that expressive practices, which have been shown to engage various ways of knowing, can play in a holistic group learning process. Heron's extended epistemological framework was used to construct the learning process to engage multiple epistemologies and a feminist research paradigm informed the research methodology.

The findings resulted in a taxonomy that comprises nineteen roles of expressive practices organized into four learning functions: foster presencing, nurture empathic understanding, catalyze deeper inquiry into experiences, and encourage engagement in expressive ways of knowing. The findings contribute to the transformative learning literature by identifying learning functions not characterized previously and by illuminating the ways expressive practices help bridge experiential knowing and propositional knowing. They also advance existing theories by suggesting that multiple ways of knowing are equal partners in the process of meaning making and transformation.

The study contributes in two other ways. It illustrates the potentially transformational power of a holistic approach to social justice education and suggests possible application to other learning contexts. Because the study was conducted with Sansei women, whose cultural perspectives, values, and practices influenced their experiences with the various expressive practices, findings indicate the need for educators to consider the cultural backgrounds of learners in designing and facilitating learning processes.

In this experiential session, learners will have an opportunity to participate in a holistic group learning experience designed to engage them in multiple ways of knowing. Our session will explore the following questions: How do we, in practice, help learners engage in the emotional and intuitive dimensions of learning and integrate those with cognitive rational processes? What roles do expressive practices serve in fostering transformative learning using a holistic theoretical approach? What are some of the challenges and risks to engaging learners in a holistic approach to learning about oppression and privilege and how do we as educators attend to these issues?

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[1] *Sansei* in this study is defined as a third generation Japanese American or Japanese Canadian whose second generation parent(s) lived in the continental United States, Canada, or the territories of Hawaii and Alaska between the years 1942 and 1950

Holistic Orientation to Transformative Learning Theory

Holistic orientations to transformative learning argue for the importance of not only assisting learners in developing critical reflection through the use of group dialogue, reflective journaling, and critical questioning, but also in actively stimulating, dialoguing about, and integrating the emotional, imaginative, and intuitive experiences of learning in concert with rational cognitive processes. In particular, Yorks and Kasl's (2002) holistic approach to transformative learning, which they call whole-person learning, takes the perspective that it is the intentional interplay and interdependence between a learner's various capacities for knowing—relational, somatic, spiritual, intuitive, cognitive, and practical ways among others—that is not only central to transformation, but also to the meaning-making process itself. In their view, transformative learning is "an authentic, enduring change in a person's affective, cognitive, and practical being" (Kasl & Yorks, 2012, p. 507). In essence, transformative learning from their perspective is broader than a change in cognitive habit of mind, it is a change in "*habit of being*—a holistic relationship to one's world experienced through coherence among multiple ways of knowing" (Kasl & Yorks, 2012, p. 507).

Heron's (1992) phenomenological perspective on human knowing and his extended epistemological framework provides the conceptual basis for understanding Yorks and Kasl's transformative change in habit of being. In the following paragraphs we provide a brief introduction to Heron's extended epistemological model.
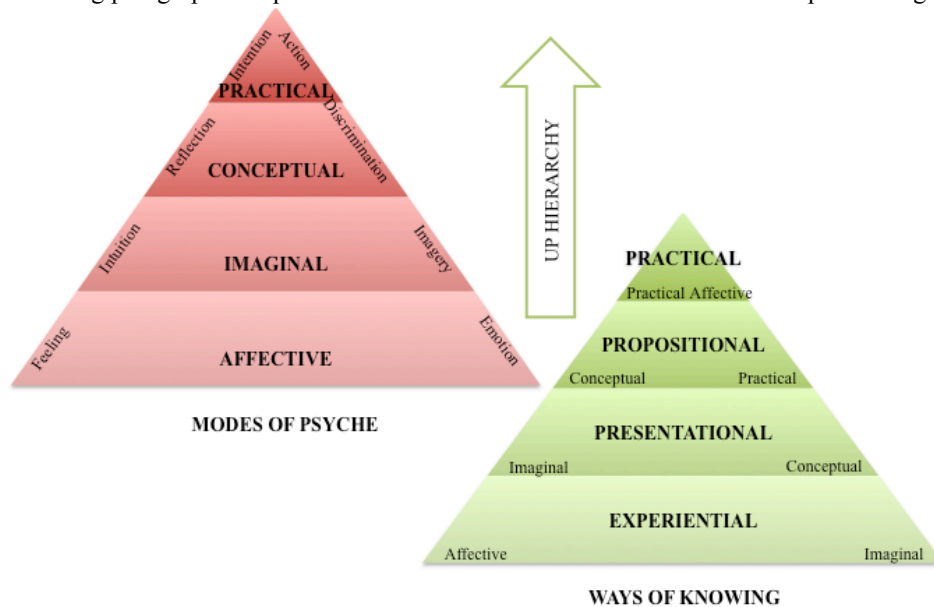
Figure 1. Heron's Conceptualization of Modes of Psyche and Ways of Knowing
Adapted from *Feeling and Personhood* (Heron, 1992) and Yorks and Kasl (2002, p. 183).

In his developmental paradigm, Heron situates and interrelates four ways of knowing and modes of psyche in an up-hierarchy model he represents with a pyramid (refer to pyramid on the right in Figure 1), where each way of knowing grounds the one(s) above it and is nourished and supported by the layer(s) below it. These four ways of knowing constitute "a radical epistemology…*extended* beyond the ways of knowing of positivist oriented academia" (Heron & Reason, 2008, p. 367), which privileges propositional knowing over other ways of knowing. Heron grounds human knowing in direct felt experience—experiential knowing, shown at the base of the pyramid (1996, p. 33). Originating in the *affective* and *imaginal* modes of psyche, experiential knowing relies on the processes of feeling, emotion, intuition, and imagery. *Presentational knowing* grows out of the realm of experiential (felt) knowing and can be described as our intuitive grasp of the meaning of imaginal patterns as expressed in various forms of artistic expression, such as storytelling, sculpture, drawing, poetry, movement, music, and aesthetic imagery. It is the link between "our experience and our 'thinking' about that experience" (Paxton, 2003, p. 101). *Propositional knowing* represents the dominant paradigm of knowing in transformative learning theory, what Mezirow calls *habits of mind* (2000), and draws on concepts and ideas as expressed in logical intellectual

statements, both verbal and numeric. *Practical knowing*, at the apex of the pyramid, completes the other forms of knowing through action in the world.

Heron and Reason (Heron, 1996; 1997) argue that validity in a person's knowing requires the coherence among the four ways of knowing. For example, when a person's actions are inconsistent with his or her espoused beliefs, the model would describe this phenomenon as a discrepancy between propositional and practical knowing. Heron and Reason argue that it is by practicing *critical subjectivity*—fostering awareness of all four ways of knowing and creating coherence among them—that supports change that is enduring in transformative learning.

An Alternative Taxonomy of Expressive Practices in a Holistic Group Learning Process

The findings of dissertation research conducted by co-author Kaya (2012) resulted in a taxonomy that comprises nineteen roles of expressive practices organized into four learning functions: encourage engagement in expressive ways of knowing, foster presencing, nurture empathic understanding, and catalyze deeper inquiry into experiences. Rather than being discrete activities, these learning functions can be viewed as processes, where each function is comprised of interrelated activities represented by the roles of expressive practices grouped within each function. The study findings extend previous work conducted by Yorks and Kasl (2006) and provides a more fully articulated alternative to a taxonomy they presented. In this experiential session we will engage participants in a sample of expressive practices such as guided meditation and drama techniques that we will relate to the taxonomy presented in this paper. We now summarize each learning function, how they foster transformative learning, and its connections with the clustered roles of expressive practices associated with them.

We describe the learning function *encourage engagement in expressive ways of knowing as facilitating knowledge construction through the imaginal, symbolic, somatic, and subconscious processes* (see Table 1). These particular roles of expressive practices were grouped with one another and with this learning function because they relate to engaging learners in meaning making as expressed through symbol, image, emotions, and other forms that transcend rational thought. This learning function is closely aligned with and illustrates the role of extrarational (Boyd & Myers, 1988; Dirkx, 2006) processes in transformative learning and how expressive practices can support engagement in learning processes that transcend rationality. A finding not previously reported in studies is the lack of clarity about whether all learners engage in expressive knowing when engaging in a holistic transformative learning experience. For example, in this study some learners did not experience roles of expressive practices such as tap into the subconscious, tune into "another channel" to deal with dissonance and emotions, stimulate "visceral turnaround in energy" or other roles that would indicate their engagement in subconscious, somatic, and symbolic processes. This particular finding is significant because it suggests that the use of expressive practices in learning does not necessarily signify that learners will engage in expressive ways of knowing. The relationship between learning and knowing in the use of expressive practices is not well understood and warrant further study.

Table 1
Description of the Function Encourage Engagement in Expressive Ways of Knowing

> **Encourage Engagement in Expressive Ways of Knowing** – Facilitate knowledge construction through imaginal, symbolic, somatic, and subconscious processes
> ➤ Tap into the subconscious
> ➤ Activate imagination
> ➤ Tune into "another channel" to deal with dissonance and emotions
> ➤ Stimulate "visceral turnaround in energy"

The next learning function, *foster presencing,* we describe as *encouraging a state of consciousness in which people experience non-defensive openness, flexibility of thought, curiosity and questioning, and a willingness to be changed by the inquiry process* (see Table 2). The description of this particular function of expressive practices is based on Hart's (2008) theory of interiority in which he posits that the epistemology of *presence* is central to the process of deep learning. He characterizes *presence* as "nondefensive openness, flexibility of thought, curiosity and questioning, a sense of wonder, suspension of disbelief, leading with appreciation over judgment, an emphasis on contact over categorization, accommodating rather than merely assimilating (in Piagetian terms), and a willingness to really meet and therefore, be changed by the object of inquiry, whether a new idea or a new person" (p. 236). In

essence, the function *foster presencing* involves processes that help learners "develop spaciousness within [them]" (p. 235) so that they are able to meet and take in the world before them.

Engaging learners in expressive practices such as guided visualization, yoga, meditation, t'ai chi, pondering poetry, and other activities designed to shift states of mind to cultivate deepened awareness, concentration, and insight serve to foster presencing. Helping learners achieve and remain in an interior state (body, mind, and emotions) characterized by a quieting of internal chatter, detachment from exterior distractions, and a sense of wonder, receptivity, and openness to change is important because attention, memory, and learning are largely state-dependent (Hart, 2008). The roles of expressive practices grouped with foster presencing suggest the importance of engaging learners in contemplative activities that foster a physiological shift and "interior emptying" (Hart, 2008, p. 241) in order to help learners be fully present, receptive to learning, and open to the possibility of being changed. However, an important finding was that engagement in practices designed to open consciousness can also bring awareness of disturbing thoughts and emotions, some of which can be disruptive to learning. This finding suggests the need to better understand how educators can help learners work with the emergence of distressing thoughts, emotions, and feelings in order to support learning and meaning making.

Table 2
Description of the Function Foster Presencing

> **Foster Presencing** – Encouraging a state of consciousness in which people experience non-defensive openness, flexibility of thought, curiosity and questioning, and a willingness to be changed by the inquiry process
> ➤ Promote sense of calm
> ➤ Facilitate listening to internal dialogue
> ➤ Foster being grounded in the present moment
> ➤ Encourage receptivity

The next function, *nurture empathic understanding,* relates to but differs from *foster presencing* in that it focuses on creating the external environment for group learning. We describe the function *nurture empathic understanding* as *living in another person's experience as if it were one's own* (see Table 3). Carl Rogers's term, "empathic understanding," originating in a therapeutic context, was used as a basis for describing this learning function because the underlying concept explains the profound way that some learners experienced being with co-learners in the study. Rogers explains "empathic understanding" as a therapist's capacity "to sense the client's private world as if it were your own" (1961/1995, p. 284). In a learning context, this means that learners not only understand or live in another's point of view (a cognitive rational dimension emphasized in dominant transformative learning theories); they experience a sense of another learner's interior experience.

The function *nurture empathic understanding* helps foster transformative learning by creating a learning space where transformation can take place. This means creating a space where learners feel the safety and support of the group as well as a sense of belonging so they are able to express and sit with diverse perspectives, examine their own and others' perspectives, disclose personal experiences and feelings, feel heard, and take risks such as trying on new perspectives, feelings, and behaviors. It took time and care to develop the capacity to live in another person's experience as if it were one's own and it was evident to varying degrees in different learning groups, with one group not experiencing this function to any appreciable extent.

Table 3
Description of the Function Nurture Empathic Understanding

> **Nurture Empathic Understanding** – Living in another person's experience as if it were one's own
> ➤ Facilitate expression and acknowledgement of diverse perspectives
> ➤ Encourage disclosure
> ➤ Create sense of feeling heard
> ➤ Nurture supportive relations
> ➤ Create a relational learning space

The final learning function *catalyze deeper inquiry into experiences* (see Table 4) we describe as *catalyze deeper inquiry into experiences* as *accessing and making meaning of memories, emotions, feelings, and perceptions*

so they may deepen into greater self-understanding or be transformed. This learning function serves not only to bring emotions, feelings, and perceptions into consciousness, but also to make them accessible for further examination and meaning making. It is this function of expressive practices—catalyze deeper inquiry into experiences—that highlights a bridging function between emotional and imaginative dimensions of learning and analytical, rational processes in fostering transformative learning.

The six roles of expressive practices grouped with this learning function entailed processes that helped learners access, examine, and make new meaning of their experiences, some of which deepened into greater self-understanding. The use of expressive practices such as storytelling, collaging, and theatre activities served to bring emotions, feelings, and perceptions into consciousness in order to make them accessible for further meaning-making and potentially lead to greater self-understanding or transformation. It was the role of deepening the inquiry that is significant about learners' experiences of expressive practices and its function in fostering transformative learning.

Table 4
Description of the Function Catalyze Deeper Inquiry into Experiences

Catalyze Deeper Inquiry into Experiences – Accessing and making meaning of memories, emotions, feelings, and perceptions so they may deepen into greater self-understanding or be transformed
➤ Encourage self-reflection
➤ Reframe perception of others
➤ Establish an "emotional pipeline" to past experiences
➤ Create an encapsulated experience
➤ Promote feeling own power

These findings contribute to the transformative learning literature by identifying learning functions not characterized previously and by illuminating the ways expressive practices help bridge experiential knowing and propositional knowing.

Application to Social Justice Education and Other Learning Contexts

The study demonstrated that a holistic framework for learning about oppression and privilege provides powerful approaches that are essential to effective social justice education and has broad applications to other learning contexts that we suggest be explored. The use of a holistic group learning process supported a social justice inquiry into experiences of oppression and privilege by encouraging self-awareness, fostering emotional connections with other people, and creating a learning space where learners can effectively explore and critically examine uncomfortable and challenging issues in an environment where they feel safe enough to express their emotions and different points of view. Furthermore, the use of expressive practices enabled learners to become aware of, express, and make sense of their emotions, feelings, and thoughts during the inquiry process.

More importantly, the holistic approach helped learners move beyond the words (North, 2008) and into a deep experience—a *witnessing*—"of the physical, material, and psychological suffering of others" (Nhat Hanh, 2005, p. 81). In other words, the holistic group learning process used in the study was designed to help learners get in touch with the emotional, imaginative, intuitive, somatic, and other dimensions of their learning in concert with cognitive, rational processes as a means of making sense of their own and others' experiences. This aspect of the holistic group learning process—helping learners move out of their heads and into a deep experience of witnessing, as Thich Nhat Hanh describes—is a key component of the learning process and is central to sound social justice education as Goodman (2001) asserts in her work educating privileged groups.

Attending to Challenges and Risks

One of the many challenges of designing a holistic group learning process is that the sequenced learning activities are not a prescribed set of techniques that can be followed like a protocol, as Yorks and Kasl (2006) caution. Greater understanding and guidance to educators about how to design and facilitate these types of learning experiences with great intention and attention is needed in the field. Moreover, while the use of a holistic approach to learning has immense potential for self-learning and transformational power, it also comes with risks and a potential to harm learners and facilitators without intention, great care, and attention in creating the right container

for such explorations. These are powerful approaches, fraught with surprises and risks, some of which can overwhelm and distress learners and groups.

As Butterwick and Selman (2012) advise, educators need to recognize that choosing to ask groups to immerse themselves in practices such as theater making "activates a potent but demanding path" (p. 68). They provide helpful principles and approaches to educators and facilitators interested in this work, particularly in using embodied theatre processes. Additionally, our experiences in facilitating holistic group learning processes argue for educators to be willing to engage in this type of learning themselves in order to be effective in helping learners develop and transform. It was our own "demanding paths" that heightened our awareness of the difficulties and demands of asking learners to undertake such a journey.

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Extending Group Sensemaking:
Practices for engaging expansive group experiences

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Abstract

Practices for expansive group sensemaking help create generative social organizing, learning and acting. Group sensemaking processes, such as group narratives and scaffolding, draw on participative social processes for making sense of complex experiences and processes. Several expansive learning practices, such as 'creating reflective spaces,' 'sitting with organizations failures,' 'acting while not knowing,' and 'self reformation' stimulate group learning within complex and equivocal flows of experiences. More transformative forms of group learning draw on participative sensemaking practices for creating group attention, receptivity, and sensegiving.

Keywords

sensemaking, group learning, strategy as practice, group experience, participative epistemology, practice based studies

Group sensemaking processes enable group learning capabilities during equivocal experiences. Group learning within complex emerging events requires expansive forms of sensemaking. Groups develop processes for sensing experiences, opportunities and problems using socially constructed practices. Expansive sensemaking practices incorporating organizing, learning, and acting drive transformative ways of meaning making. Practices for creating awareness and sensemaking are developed through group interaction, rather than through standardized sensemaking tools. These expansive practices for group sensemaking serve as significant predecessors for transformative learning. This paper seeks to answer the question "what practices enable group awareness and sensemaking in complex situations?" by providing several example practices from a reflective narrative inquiry.

Inquiry Framework

In todays rapidly changing environments, a critical organizational challenge is to navigate amidst dynamic, even chaotic situations (Engestrom, 2012). In changing situations, essential organizational capabilities include managing change during emerging contexts, opportunities and challenges (Mohrman & Lawler, 2012). To create systemic change capabilities, organizations must have ways of sensing emerging experiences, opportunities and threats. Before organizations can begin processes of sensemaking, they must become aware of discordant experiences and patterns. While organizations can detect historic trends and directions, they often lack effective capabilities for attending to "weak signals" and for creating useful "next practices" for engaging with emerging situations (Prahalad, 2011). To create trajectories of prescient change, organizations must leapfrog beyond historically derived "best practices" to create anticipatory capabilities, such as "next practices," for enhancing group awareness. These "next practices" are the basis for creating actionable understandings of 'what is,' the 'sources of the emerging change,' and 'how to create new organizational practices.' Next practices involve creating expansive awareness of emerging phenomena (scanning and problem framing), however there is little useful research on practices for enhancing awareness and creating effective preconditions for change (Mohrman & Lawler, 2012). Indeed, there are few studies of how to induce any forms of strategic sensemaking (Maitlis & Sonenshein, 2010). This inquiry explores one organization's sensemaking practices for developing awareness and meaning in emerging situations.

Group Sensemaking and Interpreting

This inquiry employs "sensemaking" as the primary lens for describing several group practices for creating group awareness and meanings within complex situations. Organizational sensemaking involves an interpretive social constructive process for introducing forms of 'stability into an equivocal flow of events' (Cunliffe & Coupland, 2012). Sensemaking is defined as those shared processes for attending and organizing unknown events and ambiguous activities into meaningful participant constructions and reconstructions for translating the world of social experience into plausible organized understandings (O'Leary & Chai, 2007). These sensemaking translations and meaning making can draw on analogies, images, or other symbolic interpretations.

An allegorical story of three 14th-century stonecutters (adapted from Drucker, 1954; Harman, 1976) illustrates sensemaking differences within an outwardly identical activity. Once upon a time, a traveler came upon a three-person crew using hammers and chisels for cutting and assembling raw stones into stonewalls. When the traveler asks, "What are you doing with these stones?" the first stonecutter replies he is earning a living by cutting and assembling stones. When the second stonecutter is asked what he is doing, this stonecutter continues working, while replying that he is "very precisely cutting and assembling these stones, because he wants to be known as the best stonecutter in the province." When asked the same question, the third stonecutter joyfully exclaims that he is constructing "*a magnificent cathedral expressing the glory of God*."

Note that each stonecutter is performing the identical activity, but their meaning making and interpretive frames grow out of divergent types of sensemaking. They do identical work, however they are not engaging in the same practice because they operate from different interpretive epistemologies. The first stonecutter interprets his work as merely a practice for putting food on the family table. This sensemaking framework is based in "doing the work that I'm paid for." A sensemaking image would be a "*drone worker bee*" bringing honey home to the hive. The second stonecutter's sensemaking is based in the frame of being a highly skilled professional taking a craftsmen's' pride in making perfectly squared stones. This sensemaking frame is focused on professional stonecutting standards, while excluding any social and spiritual benefits that constructing a new cathedral may bring. This sensemaking uses a technocratic focus on "*doing things right*." A sensemaking image might be Ebenezer Scrooge (before he is visited by the Christmas ghosts) who is enamored of his expertise and high monetary standards. The third stonecutter is not simply a skilled craftsman, since his expansive sensemaking grows out of giving material expression to transcendent spiritual values for the benefit of wider social networks. This expansive and more transformative form of sensemaking focuses on "*doing the right things*" in order to enhance community spiritual well being. A sensemaking image would involve a network of spirit-filled buildings where stained-glass windows reflect the many colors of the saints.

The second stonecutters framework of "doing things right" prioritizes individual and professional craft standards that may become misaligned with community purposes. While professionalism has its advantages, professionalism can also be counterproductive. Myopias of professionalism (such as best practices) can debilitate group sensemaking, particularly expansive forms of sensemaking within equivocal situations. Limitations of professionalism can constrain or rigidify group sensemaking to:

- understanding what to do, rather than understanding why to do the work,
- reducing work practices to obvious tasks, rather than creating a sense of overall significance,
- impeding a sense of the bigger picture, a vision of shared (or social) purposes and possibilities,
- reducing work to the trivial here and now, rather than seeing the larger impact for groups, organizations, and institutions (adapted from Higson & Sturges, 2012).

One notable stream of sensemaking research focuses on sensemaking representations based in cognitive retrospectives (such as cause-effect maps or rational flow charts), while other streams of sensemaking focus on narrative re-living from inside the events or from primordial experiencing (such as attending to images or feelings) (Cunliffe & Coupland, 2012). While narrative and experiential methods can enlarge the scope of organizational sensemaking, they may also impose constrictions, such as narrative rationality or action-reflection coherence. Lynne Keevers and Lesley Treveaven (2011) propose four modes of reflection and meaning making: anticipatory, deliberative, organizing, and, critically reflexive. Phenomenological and participative ontologies can extend experientially-based sensemaking toward attending to the dynamics of nascent experiences, chaos, unknowing, complexity, and equivocality that are often outside the scope of cognitive processes. These participative sensing practices for group experiencing require attending to trans-individual forms (Chia & MacKay, 2007, Tsoukas, 2010) of group awareness, experiencing, and activity flows.

In highly emergent situations characterized by processes of "mystery" (filled with paradoxes and puzzles), where patterns are emerging (Engestrom, 2012) and/or when phenomena are ambiguous, chaotic or equivocal (Martin, 2009), anticipatory and expansive forms of sensemaking are at a premium. Anticipatory forms of sensemaking, such as scanning for patterns (Engestrom, 2012) or using expansive forms of awareness are critical within mysterious situations. "Complex" situations (Engestrom, 2012) with unknown processes call for practices

drawing on open-ended prompts, heuristics, or rules of thumb (Martin, 2009). "Simple" (Engestrom, 2012) or "formulaic" (Martin, 2009) situations can use simplified processes, such as standardized procedures, existing routines, or algorithmic forms of sensemaking toward their resolution

Expansive group sensemaking seeks to overcome the limitations of individualized (often technicalized) forms of sensemaking by developing holistic attention to experiential and presentational knowing towards interweaving multiple ways of attending to group awareness (Kasl & Yorks, 2012). Expansive sensemaking requires practices for abstracting group experiences and phenomena "out of the undifferentiated flux of raw experience" to be "conceptually fixed and labelled so that they can become the common currency for communicational exchanges" (Chia, 2000, p. 517). Expansive group sensemaking practices are constructed within larger group capabilities, such as collective patience, anxiety toleration, and sustained attention. More holistic practices for creating group awareness serve as practical, deliberative and detached ways (Tsoukas, 2010) for creating expansive sensemaking. Without expansive sensemaking practices, groups may become constrained by the limitations of cognitive modes, thus falling into the technical myopia shown by the second stonecutter.

Inquiry Methods

This study used an interpretive narrative method for creating narratives involving experiential feelings around major shifts in a social change organization's strategic activities. Using these experiential narratives as reflective incidents, the organization's staff (the inquiry group) collectively created reflective descriptions of organizational capabilities and practices indicated in these major shifts. These reflections on group practices involves stepping back from the immediate narrative experiences to formulate "thematic awareness" around group experiences (Tsoukas, 2010) and how their practices shape interpretive shifts.

This inquiry used the "Reflective Narrative" method of the Center for Reflective Practice (Amulya, 2003) for creating group narratives of organizational shifts. This method emphasizes multiple narrative modes within the following sequence of steps:

- sharing narratives of significant moments in group actions,
- selecting a subset of narratives/moments for in-depth reflection,
- reflecting on the narratives' critical shift(s) from multiple perspectives, and
- developing a shared analysis of shifts, focusing on the factors supporting each story's shifts (Amulya, 2003).

The inquiry group created narratives of notable organizational shifts that were followed by reflective cycles for developing grounded descriptions of practices supporting major shifts. Ten narratives (eight stories, poems, or dramatic skits, and two "future vision" narrative enactments) were the primary narrative material for identifying major shifts. The inquiry group first synthesized these narratives, descriptions, group learning events, themes, and capabilities into a set of organizational learning and change practices, followed by further thematic analysis by the researcher, followed by additional group reflection on the practices supporting shifts (Kelley, 2011). This paper only discusses those group practices for creating awareness and complex sensemaking.

Practices for Expansive Group Sensemaking

This section presents situated descriptions of expansive practices for group sensemaking within complex or disorienting group shifts, introducing group practices used during times of complexity and equivocality. These five expansive sensemaking practices are oriented toward bringing experiential/reflective knowing into awareness, so that group sensemaking can become increasingly holistic (Table 1).

- Self formation/reformation
- Creating reflective space
- Sitting with organizations failures
- Mixing ingroup, shadow, outgroup, and oppositional perspectives together
- Acting while not knowing

Table 1. Practices for Expansive Sensemaking.

Self Formulation/Reformulation

The practice of "self formation/reformation" involves group sensemaking in situations that are 'ambiguous, murky, or discordant,' and where action shifts are likely. In narratives of several group shifts, conflicts between the group's sense of self-identity compelled efforts to align group actions with core shared values. A reflective description was: "You're going down a road, and the way you choose which way to go - is based on two things: your moral compass of values, and your analysis. Those are your guiding compasses, for lack of a better word. It's an intersection between pragmatism and idealism." This group sense of self (its internal moral compass) is at the core this group's self-identity, and is the basis for ethical action. This self formulation/reformulation practice works to shape group actions to align with the group's sense of who it is (group goals, norms and boundaries) and with its ethical identity.

Creating Reflective Space

When creating a new program or strategic direction, the group typically assesses potential congruence with core values and strategies. Thus, developing a new initiative involves creating reflective space to assess values and complexities in new activities or strategies. One portion of this reflective space is to assess the " broadband spectrum of values" that potential new activities would align with. Before key organizational shifts (in strategies or in activities), the group uses structured processes (retreats, etc.) and unstructured ways (informal information sharing, personal research, and exchanges with partners) to create reflective spaces for assessing/modifying strategies and for shifting programs. These intentional spaces for reflective interactions are intended to collectively work through potential challenges by creating shared meanings around new initiatives or program shifts.

Sitting With Organization's Failures

The practice of "sitting with organization's failures" involves intentionally taking time to understand past activities during ambiguous, murky, or discordant situations before starting new or corrective actions. This practice is invoked when a program or strategy is failing and the group is uncertain about key logic or activity patterns. 'Sitting with failure' involves creating active space for attending to inside and outside feedback/meanings around unsuccessful activities. Sitting involves attending to diverse perspectives, such as ironical internal organization interpretations (subaltern interpretations), reflections that embody an opponent's perspective, or critical internal and external evaluations of failure factors.

Mixing ingroup, shadow, outgroup, and oppositional perspectives together

The practice of "mixing perspectives" involves the intentional confabulating of diverse perspectives, including subaltern internal perspectives with perspectives of program opponents. This intentional mixing (confabulating) gives empathetic voice to group uneasiness and unresolved ambiguities through bricolaging shadow, outgroup, and oppositional perspectives within uncomfortable or ironic processes of sensemaking. This bricolaging can draw on unresolved shifts in historic organizational identity, attend to uncomfortable aspects of shifts in action, and can give voice to ongoing strategy dilemmas.

Acting While Not Knowing

This practice involves more intuitive sensemaking forms, using action experiments to develop informative feedback regarding ambiguous situational aspects and assumptions. The intention is to "get information" about situated assumptions, prior to initiating "better" actions (Kegan & Lahey, 2009). This practice by the highly activist inquiry group enables active experiments in the midst of highly uncertain situations. The inquiry group distilled this practice into a colloquial mantra of: "do what you want, just don't screw it up." The group's cultural willingness to take risks in developing their sensemaking undergirds this "acting while not knowing" practice.

Discussion: Sensemaking as Participating

This inquiry sought to go beyond cognitive processes of "plan, do, and reflect" to foreground expansive sensemaking practices during organizational shifts. Creating group meaning making requires both explicit sensemaking (e.g., reframing) and implicit sensemaking (through narrative, analogies, routines, etc.).

These five expansive practices support intersubjective awareness and group sensemaking during times of unknowing, complexity and equivocality. Effective practicing requires capabilities to anticipate and guide "how our specific practice unfolds in time" (Sandberg & Tsoukas, 2011). Expansive practicing involves relational sequences based in developing awareness and in anticipating (sensemaking) how our practices can advance group goals. In equivocal situations, this group used expansive practices for making sense of mysterious situations (i.e. situations

lacking sense). This group's practices for expansive sensemaking moved into more participatory forms of sensemaking, drawing on:

- sensemaking (particularly organizational anticipating) is something participants "do" rather than "have,"
- focal realities are created through "trans-individual social practices" (not individualized agents), and
- both stability and change are immanent in human situations, with practicing contributing to both destabilizing and stabilizing change (Tsoukas, 2010).
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These types of collective group practices for enhancing awareness emerge from an "an epistemic inquiry foundation that stresses collaborative knowledge creation and production within the context of practice" (Yorks & Nicolaides 2007, in Dirkx, 2008, p. 267).

Conclusions and Implications

These inquiry findings based in a framework of expansive sensemaking practices suggest that collective sensemaking depends on practices for creating group attention and receptivity during times of mystery or chaos. This further suggests that effective group change is enhanced through ongoing anticipatory and expansive sensemaking practices. These expansive sensemaking practices may function as requisite predecessors for intersubjective meaning creation during sensemaking processes (Maitlis & Sonenshein, 2010). These expansive sensemaking practices can also improve group learning by serving as patterns of implicit metalogics (Kelley, 2011).

Sensemaking is an initial step in bringing experiences (both existing and future) into collective awareness that become accessible to group interpretative processes. These expansive sensemaking practices support the creation of meshworks or scaffolding in periods of uncertainties when working in ambiguous situations. In emerging and ambiguous situations, one (or more) sensemaking practices can nurture substantive shifts in group meaning making. Potential uses of these expansive sensemaking practices may be: as orienting heuristic frameworks, as scaffolds during shifts, as stabilizers during shifts, as metalogic/implicit logic(s), and, as relational sensemaking. These expansive sensemaking practices can support superior forms of collective direction, alignment, and commitment through relational leadership processes drawing on collaborative group meaning making.

The forms and scope of available sensemaking practices serve to constrain the forms of awareness that can be used in interpreting group experiences. Expansive group sensemaking practices enlarge and strengthen the capabilities of organizations to engage with emerging experiences and equivocal situations. Expansive sensemaking relies on suitable group practices for attending to forms of complex phenomena beyond the range of everyday awareness and receptivity. In equivocal situations, traditional sensemaking practices for less complex situations can become inadequate and unproductive. In situations of mystery (extraordinary complexity), expansive sensemaking practices for developing awareness are useful for working with unknowing experiences and may serve as heuristic metalogics. This inquiry's 'practices for expansive sensemaking' approach offers new insights into episodes where groups "do not always engage in sensegiving [and sensemaking], even around issues that matter to them" (Maitlis & Lawrence, 2007). This suggests that collective sensemaking requires collective capabilities to use expansive sensemaking practices for creating group attention, receptivity and sensegiving.

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Transformative Learning in a Community of Practice

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Abstract

The authors examined the experiences of students in a doctoral program cohort as a community of practice and how working in a cohort promoted transformative learning. The doctoral students were enrolled in an Adult Learning and Leadership program. The cohort members interacted with each other over the two years of the course work. The authors used the Appreciative Inquiry model to craft the interview questions and both of the transformative learning models of Mezirow and Daloz to interpret the findings.

Introduction

Doctoral students face many obstacles learning how to balance work and family obligations with schoolwork. For the authors of this paper, this balancing act had become a disorienting dilemma (Mezirow, 2000). Given the demand and rigor of the program, the authors came together to explore the following questions:

- How were they and others in the program able to continue and make progress while encountering difficult personal circumstances?

- In what ways did this experience change their perceptions of themselves and their view of the group?

The authors were enrolled in a cohort doctoral program for adult learning and leadership. All members of the cohort were experienced professionals who usually worked full-time and wished to complete their doctorate degree in the concentrated program. The coursework emphasized both independent and group study. Attendance was mandatory; anyone who was not able to attend had to step out. Students attended three summers for three weeks of intensive study including weekends as well as attending Friday and Saturday courses four times each fall and spring semester. The cohort consisted of twenty members with an additional member from a previous cohort joining at the start of the second year. All members of this cohort were able to complete the required coursework.

For this paper, we examined the issue of McClusky's Theory of Margin "power vs. load" (as cited in Merriam et al, 2007, p. 94). A questionnaire based on "The power of the unconditional positive question" (Ludema et al, 2006) of appreciative inquiry was used to explore how doctoral students in a cohort could continue to make progress in the program despite undergoing difficult personal obstacles and situations. The results indicate that in finding more power to balance load, members of the group engaged in transformative learning.

Background

McClusky's Theory of Margin

McClusky's Theory of Margin examines the balance of load and power affecting adults as they engage in learning:

This balance is conceptualized as a ratio between the "load" (L) of life, which dissipates energy, and the "power" (P) of life, which allows one to deal with the load. 'Margin in life' is the ratio of load to power. More power means a greater margin to participate in learning. (Merriam et al, p.93)

The theory addresses the transitions in adulthood when learning might occur. In situations that present obstacles and difficulty, the 'load' is greater than the 'power;' accordingly, when there are few obstacles or situations of stress, the 'power' is greater than the 'load'. McClusky's Theory of Margin is grounded in "the notion that adulthood is a time of growth, change, and integration in which one seeks balance between the amount of energy needed and the amount available" (Merriam et al, 2007, p. 93). Song (2006) conducted a study of ESL students who did not successfully pass a required bridge course which would have allowed them to matriculate into a community college. She found either familial situation (single parent or caregiver to elderly parents) or financial necessity (ability to work more hours to earn more at the expense of school work) were the key factors in students

not being able to give time to complete the assigned work and pay attention in class. Load eclipsed power and the students were not able to engage in learning and thus, were not able to matriculate into the college.

Hiemstra elaborated further (as cited in Merriam et al, 2007, p. 94), that there are both internal and external factors for load and power. The internal factors for load are one's "expectancies developed by people (such as aspirations, desires and future expectations)." External load is the "tasks involved in normal life requirements (such as family, work, and community responsibilities)." For power, the internal factors are one's "accumulated skills and experiences contributing to effective performance, such as resilience, coping skills and personality." The external factors are one's "resources…as family, support, social abilities and economic abilities." It is through the balance of these factors, or having a greater reserve of power vs. load that an individual is able to engage in learning.

Communities of Practice

Hill (2005) states that "Communities of Practice are informal groups of people who interact regularly to use collective learning and shared expertise to solve mutually engaging problems" (p. 122). Wenger states that our identities in a Communities of Practice are defined by how actively we are engaged in that Communities of Practice and whether we are on the outside of it or on the inside. The coursework in the doctoral cohort program forced participation both individually and in groups. Through participation in group activities and discussions, group members felt "engagement" through meaningful collaborations and discussions (Wenger, 1998, p. 184).

Appreciative Inquiry

The researchers chose an Appreciative Inquiry approach because they wanted to find what "gives life to the organization, the 'best of what is' in any given situation" (Ludema et al, 2006, p. 156), in other words, what mechanisms were in place that permitted students to continue in the program and what sort of support the cohort and program gave to help individual students persist. Cooperrider and Srivastva (1987) state Appreciative Inquiry "can help eliminate the artificial dualism separating theory from practice" (p. 131) by inquiring as to what is working well rather than looking at a problem to solve; therefore, the "action-researcher is drawn to affirm, and thereby illuminate" (p. 131). As Lander (2005, p. 63) states "Appreciative Inquiry seeks to redirect attention from problems and adversarial, blame-oriented conversations towards understanding or researching the best of what is". As Appreciative Inquiry focuses on what is working versus the problem area, the researchers crafted questions based on the Mohr & Watkins' model of Five Generic Processes of AI (2002).

Methodology

The study used qualitative research methodology. Social Constructivism guided the researchers' philosophical assumptions for the study. "Social constructivists hold assumptions that individuals seek understanding in which they live and work" (Creswell, 2009, p. 8). Appreciative Inquiry is an action research methodology rooted in the socio-constructivism paradigm (Gergen, 1982, 1990 as cited in Bushe 1995, p 14). The entire cohort of 21 was invited to participate, and of those, 14 responded. The researchers developed a self-administered questionnaire based upon the Mohr & Watkins (2002) Five Generic Processes of AI (Figure 1.1) to collect the data. The self-administered questionnaire was selected as a method in that it was designed to provide the interviewer with a straightforward approach to clarify questions and encourage participation (Robson, 2002, p. 234). The rationale for using Appreciative Inquiry for the questionnaire framework was that "Appreciative Inquiry is an attractive evaluation methodology for adult educators whose practice or applied research involves marginalized individuals, organizations/groups that face turmoil and low morale difficulties and environments" (Lander, 2005, p. 67). The researchers wanted to hear all voices that chose to participate.

Appreciative Inquiry Questions

Understanding what is

1. How long have you been in the program?

2. Why did you decide on the program? How do you feel being part of the program?

3. When you think of the program what comes to your mind? How do you see yourself within this frame?

4. When you think back on your experiences, what stands out the most? Why does that stand out for you?

5. How do you describe the quality of your experience?

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6. How have you created and maintained equilibrium between your life in the program and your life outside? Thinking of maintaining equilibrium what event stands out to you as being successful?

7. What do you think was most effective in making progress in the course work? How can this benefit others?

8. When you visualize yourself as a doctoral cohort student, what comes to your mind?

9. Tell me a story about a time when you really felt part of the program. Describe that experience in detail.

10. What is it that you value most about being a member of the doctoral cohort?

Imagine what could be

1. From your experience and observations, what do you consider the core value of an ideal doctoral program?

2. Imagine that you are part of a doctoral program that fulfills all your expectations for excellence. Describe that program in detail.

Create what will be

1. What do you want to get out of the program? How do you see yourself in three years? Describe that in detail.

Wrap up

2. As you think of this conversation, what stands out to you the most

Figure 1.1 Survey-Self Administered Questionnaire based upon the 4-D Step Model of Appreciative Inquiry

The researchers participated in informal discussion in weekly telephone conversations with a small group of eight students from the cohort, all of whom participated in the survey. These telephone conversations occurred every Sunday at 4 pm and lasted one hour. The researchers also participated in small discussion groups that occurred during class session breaks and in the evening after classes on Friday or Saturday during April of 2011. Some students also provided the researchers with individual email correspondences after completing the questionnaire indicating their individual reactions after reflecting upon the process. The researchers wrote analytic memos to reflect upon these small group discussions and individual correspondences.

Data was analyzed using content analysis. The research questions and Appreciative Inquiry guided the analytical categories. The researchers developed rules for inclusion to codify the data. The initial units of analysis were statements from the self-administered questionnaire completed by the students and the analytic memos written by the researchers. During the First Cycle coding, the researchers manually open coded the data solo as individual researchers and then met to discuss their findings from data and categories generated. The researchers collaboratively manually coded during Second Cycle coding to reanalyze data from First Cycle. The Focused Coding Method was used during the Second Cycle. "Focused Coding categorizes coded data based on thematic or conceptual similarity" (Saldana, 2011, p.151).

Results

The findings indicated four major themes in terms of power to cope with load emerged: *Planning Ahead*, *Self-Regulation, Know-Thy-Self* and *Support*. The first three themes correspond to Hiemstra's (Merriam et al, 2007) category of internal power while the last refers to external power. There seems to be a shift in some of the participants who show the effect of external power giving rise to internal power.

In "Planning Ahead" the rule for inclusion was that participants said they needed to manage outside commitments and make detailed schedules and plans. One participant stated: "Setting personal goals outside the syllabi and deadlines prescribed in the program" was most effecting in making progress. Others would strategize by doing more on good days and prioritize which assignments were more important. One participant said: "Planning and organization are key. On good days, I tried to read more than 2 chapters at a time or write more than a few pages to keep me going."

In terms of the next category, "Self Regulation," two subcategories emerged: internal and external regulations. The rule for inclusion for internal factors included not being hard on self; controlling the sense of being overloaded; maintaining a perspective, creating time for self, preserving despite obstacles. One participant stated: "I sacrifice sleep and try to sneak in school work as much as possible. My train ride has been a major factor in getting through this…the 1+hour a day really helps get (me) through the grind." The rule for inclusion for external factors were keeping to a schedule; forgoing social and leisure activities to study; being attentive to deadlines and regulating time. One participant stated: "It has been hard to balance life. I feel like I have given up a lot of my hobbies and free time like playing tennis and reading for fun."

In the Know Thy Self" theme participants needed to know what they wanted. This meant that they stopped viewing other things as a priority to engage in self actualization through reflection: they needed to understand how they work and do things. One participant wrote: "Two things come to mind—being reflective and looking at alternative explanations/alternative points of view. Within this frame, I feel calmer, happier with myself, more confident about the decisions & judgments I make."

The last theme was "Support" which identified family, friends, and faculty and cohort members for the rule for inclusion. Some members felt their families kept them grounded while others felt that the cohort itself was powerful. One participant stated, "If left up to me, I would have quit the program in the first spring with all that I was going through. There are many caring people in this cohort who really helped me through, gave me encouragement, advice and even kicked my behind. I realized that I did not want to forfeit my place in this group. As corny as it sounds, their collective strength energized me."

Discussion

This study has revealed the connectors of adults making meaning in a community of practice. Transformative learning involves critical reflection on our assumptions. Transformative learning occurs through subjective reframing. "Subjective reframing involves critical self-reflection of one's own assumptions a about a narrative; a system; an organization or workplace; feelings and interpersonal relations; and the way one learns" (Mezirow, 2000, p.23). The data suggests that participants were able to self reflect to break free of preconceived notions of limitations. Participants explored new roles for themselves and family, friends, and significant others as identified in the "Know Thy Self" theme. The fifth phase of the Mezirow's transformation phases of meaning involves the "exploration of options for new roles, relationships, and action" (2000, p.22). The data suggests that some participants had moved through phases 5 through10 by reintegrating into life under new conditions as identified in "Know Thy Self". The research also indicates that students in the cohort program moved through Meizrow's ten phases of meaning at different intervals in the cohort program to manage the "load" of life to actively participate in learning and manage family and other life demands to facilitate movement into the "power" of life.

The research suggests that the dynamics of the cohort support mentoring among students in small groups through their use of stories and changes in perspective. These small groups were formed through personal and scholarly interests. The structure of the cohort program supported positive small group interactions through reinforcing agreed upon norms and positive guidelines in communication with others. The small groups extended beyond the cohort program establishing learning networks. "Learner networks are sustained relationships among a group of people within a formal or informal learning context or a relationship that extends beyond the boundaries of the learning group" (Cranton, 2006, p. 166). Additionally, "the group may be seen as a learning entity (Kasl and Elias, 2000) with the capacity to develop and transform. At the very least, the group can provide a protective and comforting blanket for those individual members who are experiencing the sad or difficult sides of transformation" (Cranton, 2006, p. 164).

Implications

The results of the questionnaire were consistent with the first three steps of the Five Generic Processes of AI (Mohr & Watkins, 2002). The findings were based upon the "discovery phase" of Appreciative Inquiry which is appreciating the best of what is: Looking at the peak experience values and wishes. In Step 1, the researchers chose and defined the positive focus. Next came the Discovery step in which the researchers call for participants to describe positive movements and discover what gave life to these positive experiences. In AI, the next two phases of Dream (asking participants to create a future image of themselves) and Design/Destiny (asking participants how they could innovate or improvise to create a preferred future) would be done together with the group. Questions were crafted for possible future discussions. Future research may want to continue the process.

Concluding Thoughts

To conclude, the data gathered from the self-administered questionnaires and the analytic memos indicate that transformative learning occurs in a doctoral cohort community of practice through reflection where participants

reflected upon their assumptions in informal and formal settings. Merizow (2000) indicates that critical reflection is essential to adult learning. The researchers found that during the cohort program participants were able reflect and make meaning from their feelings and the values placed upon their assumptions. In the "Know Thy Self" theme data indicated that participants moved through phases 6 through 10 of Mezirow's ten phases of meaning for transformation. The "power" of life was increased for participants when they explored new options to previous firmly held assumptions. Through exploration and the trying on of new roles the energy of the "load" of life was decreased. The researchers found that some participants when exploring new roles and planning a course of action tried on new roles by delegating responsibilities to others while other participants increased their responsibilities when trying on new roles. Participants built confidence in their new roles through conditions managed by their personal internal and external regulations. Participants' indicated a reintegration into life with new assumptions with phases as "I'll make it" and "taking care of business".

The research confirms that learning in informal and formal groups in a cohort can be linked to transformative learning for participants. Analysis of the data reveals this in several ways: 1) disorienting dilemma associated with the "load" of life, 2) self-examination of feelings, 3) critical reflection 4) recognition of discontent ("load" of life) is shared in informal and formal groups with others, 5) exploration of relationships and roles, 6) planning a course of action, 7) acquiring skills for implementation, 8) trying new roles, 9) building self-confidence 10) reintegration into life on the condition of a new perspective

Finally, the cohort as a community of practice can foster transformative learning. The community of practice can permit the participants in the cohort with an environment to explore differences, engage in reflective discourse, develop a mentoring community, and provide for opportunities of committed action. Daloz states "that people need to make meaning of their experiences and that individuals are often in a developmental transition when they seek higher education to help make sense of lives whose fabric of meaning has gone frayed" (Merriam et al., 2007, p. 138). Discourse was an element to the participants of this study in line with Daloz's approach to transformational learning.

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Experiencing an Holistic Approach to Transformative Learning

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Abstract

This session weaves together theory and praxis by presenting the empirical results of a qualitative study based on an innovative theoretical and conceptual approach to understanding the interaction of the individual with the external context. The overarching themes that emerged from the research are interspersed with experiential interludes that offer the session attendees the opportunity to experience a selection of these mind-body-emotion practices and reflect on them in small groups.

Introduction

Learning is a natural part of life, beginning in utero and continuing in various phases throughout childhood, adolescence and adulthood. The research stream of adult learning and development studies how this learning process unfolds for adults, with the specific field of transformative learning devoted to understanding how adults achieve a deeper, more radical level of learning in the transformation of their perspective, or way of viewing life (Mezirow, 2000). While Mezirow (1978) initially focused on how adults achieved transformative learning by addressing disorienting dilemmas through rational means, later authors stressed the importance of emotional, kinesthetic, extrarational or holistic means of transformative learning (Cranton & Roy, 2003; Hoggan, Simpson & Stuckey, 2009; Yorks & Kasl, 2002). Another critical element of the transformative learning process was found to be the context in which the learning occurred (Taylor & Cranton, 2012).

The interaction between an individual and her environment is complex, a relationship captured by the concept of the embodied habitus (Bourdieu, 1990) that describes how individuals internalize at an unconscious, bodily level the influences of the external environment. The theoretical framework of strong structuration (Stones, 2005) conceptualizes this interaction as a reciprocal duality between internal and external structures, providing a means of empirically testing how the transformative learning process may unfold. This experiential session falls primarily within the domain of adult education and learning with its emphasis on studying the transformative learning experiences of individuals within the context of a specific community environment. The session weaves together theory and praxis by presenting the empirical results of a qualitative study (Kennedy-Reid, 2012) based on the theoretical framework of transformative learning theory (Mezirow, 2000) and strong structuration theory (Stones, 2005). Interspersed between the presentation of each of the three overarching themes, interactive holistic learning practices will both engage the participants experientially and provide the opportunity for small group sharing and reflection on how such practices may enhance the transformative learning experience within a variety of contexts.

Setting the Stage: Theoretical Framework, Research Design and Study Results

This qualitative study (Kennedy-Reid, 2012) investigated how a holistic approach to learning may support transformation. The focus of the study was transformation of the *habitus,* described by Bourdieu (1990) as an embodied system of dispositions that is visible in a pattern of behaviors. This research was particularly interested in transformation that not only resulted in a new perspective, but was concurrently visible through a change in behavior. The sustained modification of perspective that also manifests changes in both lifestyle and behavior is a convincing indicator of the individual having had a transformative learning experience (Mezirow, 2000).

Theoretical Framework

Transformative learning theory describes how adults experience deep learning and change, whether this occurs as an ongoing or epochal process (Mezirow & Taylor, 2009). Mezirow describes the key element of perspective transformation as the change in meaning perspective that ultimately influences how individuals perceive the world with a specific worldview, or frame of reference. For Bourdieu (1990), the personal schemata underlying an individual's action results from habitual and embodied ways of thinking, perceiving and acting. He terms this the habitus, a system of dispositions that is an embodied internal structure. Acquired through early conditioning, the habitus tends to influence one's actions from an unconscious level of awareness, and while it is malleable and subject to further influence, it may also remain fairly durable throughout one's life.

At first glance, habitus (Bourdieu, 1990) may seem similar to the transformative learning construct of habits of mind (Mezirow, 2000). There are, however, some fundamental differences in the assumptions underpinning the two constructs. Habits of mind includes epistemic, sociolinguistic, psychological and aesthetic

dimensions (Cranton, 2006), with an overall emphasis on the importance of one's rational mental faculty. Even though the habits of mind include the notion of values and assumptions below the level of conscious awareness, particularly in the sociolinguistic and psychological dimensions, the construct implies the overall ability to transform primarily through the process of critical self-reflection (Mezirow, 2000). While rational, cognitive processes surely play an incontrovertible role in transformative learning, philosophers of mind maintain that reason and reflection are intimately linked to our embodied nature as humans, stating that "Reason is not disembodied. . ., but arises from the nature of our brains, bodies, and bodily experience" (Lakoff & Johnson, 1999, p. 4). They assert, in fact, that contrary to the emphasis in Western traditions on critical thinking, ". . . the mind is inherently embodied, reason is shaped by the body, and since most thought is unconscious, the mind cannot be known simply by self-reflection" (p. 5).

In addition to the emphasis on the embodied nature of cognition, cognitive scientists underscore the interdependent interaction of individuals with their environment (Clark, 2008). Transformative learning theory acknowledges the interaction of both individual and social processes of learning (Taylor & Cranton, 2012), but fails to provide a means to conceptualize this relationship. Strong structuration theory (Stones, 2005) draws on the work of Giddens describing the reciprocal duality of structure between individual and environment to provide a theoretical framework that conceptualizes the interdependent relationships of external structures such as family, work, or community and the internal structures such as beliefs, values and assumptions of individual agents. Strong structuration's "quadripartite cycle of structuration" (p. 9) consists of: (1) *external structures* as conditions of action; (2) *internal structures* within the agent; (3) *active agency*, including a range of aspects involved when agents draw upon internal structures in producing practical action; and (4) *outcomes* (as external and internal structures and as events) (p. 9).

Stones (2005) frames this interdependent interaction of individual and external environment as a relationship of reciprocal duality between the external and internal structures, with the internal structures incorporating Bourdieu's (1990) dispositional aspect of habitus. The habitus consists of acquired dispositions that provide the basis for action within the *in-situ* context of one's environment or context. As noted in her study focusing on the phenomenological experience of transformative learning, "this structuration framework should be regarded as a theoretical tool that artificially separates what is, in fact, indivisible" (Kennedy-Reid, 2012, p. 4). Drawing on multiple traditions that assert the embodied nature of learning, the conceptual framework (Figure 1) for this study (Kennedy-Reid, 2012) incorporated a holistic approach to learning (Yorks & Kasl, 2002) that acknowledges and encompasses rational as well as affective, somatic and other ways of knowing. This approach is in accordance with the findings of Taylor's (1997, 2007) meta-analysis of transformative learning studies that highlighted the importance of transformative learning processes other than the cognitive, rational approaches propounded by early transformative learning theory (Mezirow, 1978; 2000). According to these studies, other forms of learning may incorporate "learning that takes place outside of one's focal awareness" (Taylor, 1997, p. 52), and whole person learning, the "awareness and use of all the functions we have available for knowing, including our cognitive, affective, somatic, intuitive and spiritual dimensions" (1997, p. 48).

After decades of further development by scholars around the globe, transformative learning theory (Mezirow, 2000) now incorporates a variety of approaches—emotional, somatic, extrarational, spiritual, and others—in addition to a primarily rational means of explaining the transformative learning process. There is also an acknowledgement of the role of one's context in achieving a new perspective, but the relationship between individual and context needs further exploration. Strong structuration theory (Stones, 2005) with its inclusion of the embodied nature of the habitus offers a theoretical framework for both conceptualizing and studying the adult learner's patterns of interaction *with* and *within* the learner's social context. Better understanding the nature of this interdependent relationship may both contribute to transformative learning theory, and improve the understanding of how an individual's habitus evolves and becomes internalized, thereby providing a means of surfacing this deep, embodied structure and potentially transforming it.
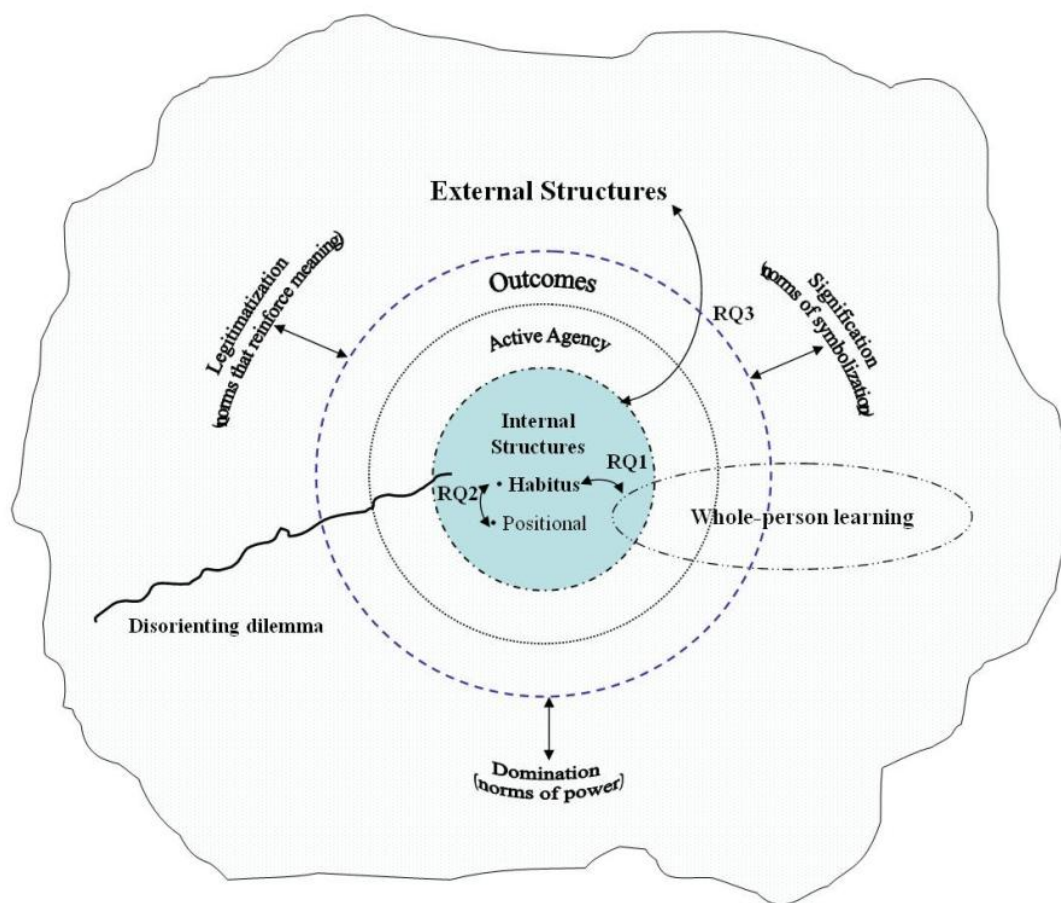
Figure 1. Conceptual Framework of the Transformative Learning Process

Research Design and Study Results

The purpose of this study (Kennedy-Reid, 2012) was to explore how an individual's habitus (Bourdieu, 1990) was influenced by holistic learning processes incorporating a mind-body-emotion approach during the transformative learning process. A holistic approach such as this may incorporate "multiple ways of knowing" at an affective, cognitive and kinesthetic level of experience (Yorks & Kasl, 2002, p. 185).

The overarching research question addressed this issue as follows:

1.   What is the relationship of a holistic approach to learning to transformation of the habitus as a system of dispositions?

To better understand this process, the study asked the following sub-questions:

2.   How is the dynamic interaction between the conjuncturally-specific and habitus aspects of internal structures influenced during the transformative learning process?

3.   How do external and internal structures co-evolve during the transformative learning process?

The phenomenological research approach foregrounds the *lived experience* of the individual (Polkinghorne, 1989; Gallagher & Zahavi, 2008). In keeping with this qualitative approach, the site and research participants were purposefully selected to increase the likelihood of addressing the research questions of interest. Ten individuals representing a diverse sample in terms of ethnicity, culture, age and gender met the design criteria and were selected as participants. They took part in twenty in-depth, two-part interviews (Seidman, 2006) that were used to elicit descriptions of their transformative learning experience. Additionally, longitudinal emic immersion and participant observation provided a means of triangulating the data for analysis, producing individual-level as well as overarching themes.

In answering the first research question, participants described how the mind and body were inextricably linked in supporting growth and transformation. As they told stories of how their physical practices

supported the learning process, several of them used the metaphor of the physical body as a 'gateway' to transformation, together with mental, emotional and spiritual dimensions. They also described the fundamental role of emotion in the transformative learning process, with codes related to emotion being the number one code across the study sample. Overall, the data for the first research question led to the overarching theme: "Linkage of Physical Practices to Transformation."

In the second research question, participants were asked to describe the interplay between their understanding and performance of the various roles they held (parent, spouse, sibling, manager, or colleague), and their own beliefs about these roles, with the intent for the researcher to analyze how the two aspects of internal structures—habitus and positional—might evolve and change during the learning process. Participants spoke about the seminal influence of their primary family, but they also related many situations where they experienced tension and conflict with family members as they renegotiated and reconciled these roles from their new, transformed perspective. Over time, they began to shift from a focus on the demands from others in their external environment to an internal focus of their own desires and needs. The study data for this question resulted in the overarching theme: "Participants' Perception of Shifting to an Internal Focus."

The third research question addressed the co-evolving interplay of internal and external structures. Participants clearly spoke about the interdependent relationship of these structures in terms of how external structures in terms of role-based relationships formed their internal frame of reference. They also acknowledged the importance of new external structures—the research site—in both supporting and maintaining the new perspective gained in their transformative learning experience. Furthermore, many spoke at length about how their new perspective had impacted their relationships with others. This interwoven and integrated interplay of the individual with their social context led to the overarching theme: "Recognizing Transformation in the Dynamics of Relationship." The following section provides further description of the three overarching themes and the experiential interludes for the session.

Theme 1: Experiential and Reflective Interlude

Three overarching themes emerged in response to the research questions exploring the relationship of a holistic approach to learning in transforming the habitus. In the first theme, "Linkage of Physical Practices to Transformation," participants discussed the interwoven interplay of the mind, body, emotion and spirit, describing the importance of physical practices in facilitating change. The vital role of emotion in the transformative learning process may be described as "embodied affect" where many participants described how they used the physical body to help identify, heal and release emotions. "Embodied spirituality" may be used to typify how physical practices such as meditation or bowing catalyzed and supported spiritual growth for many of the study participants, and "embodied cognition" indicates how the physiology of the body determined what the mind could perceive, as well as the reciprocal influence related by participants between physical practices and cognitive processes. See Figure 2 for a graphic representation of this theme.
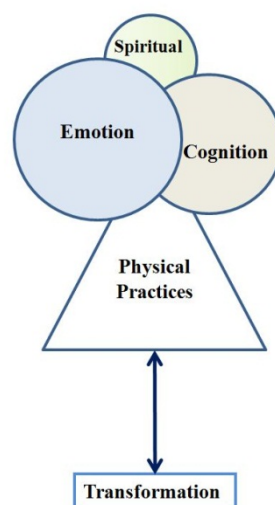
Figure 2. Theme 1: Linkage of Physical Practices to Transformation

In the experiential interlude following this theme, the presenter will introduce a practice that incorporates mind-body-emotion-spirit dimensions, encouraging participants to reflect and share on how such an integrated, physical-based practice may foster transformative learning.

Theme 2: Experiential and Reflective Interlude

The second theme, "Participants' Perception of Shifting to an Internal Focus" (see Figure 3), emphasized how individuals transformed through shifting from an external to an internal focus. Study participants described the interdependent relationship of external and internal structures where the perceived influence was initially strongest from an external to internal direction. Over time, individuals shifted to more of an emphasis on internal structures with a concomitant decrease in the influence of external structures. Interestingly, as they achieved a balance between the influence of internal and external structures, several study participants found they were able to engage in new, expanded relationships with those in their external environment.
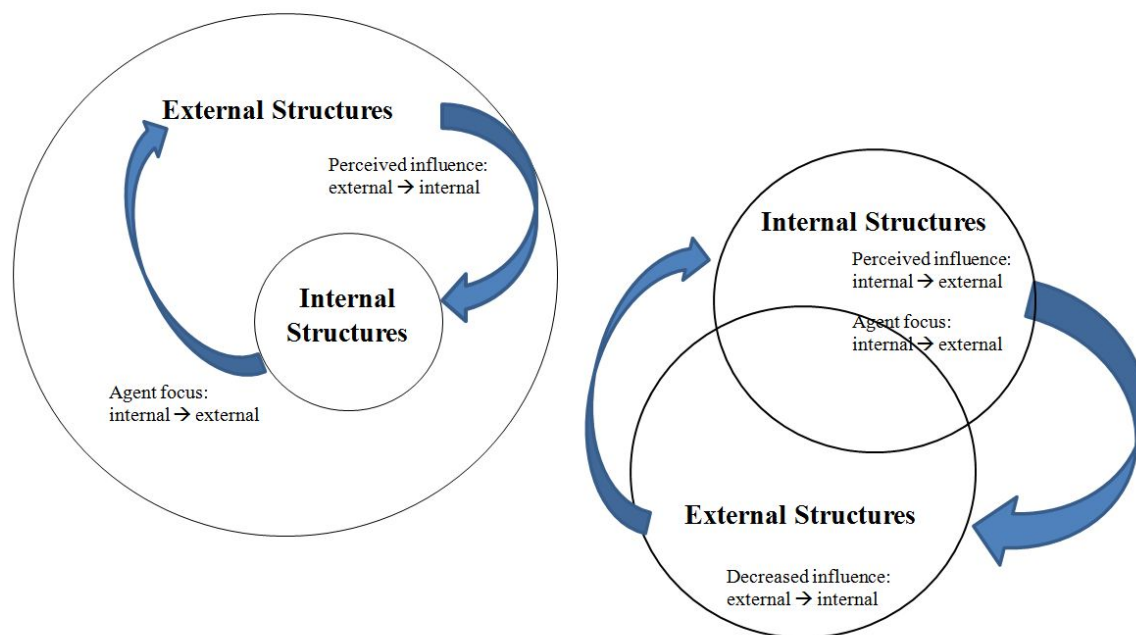
Figure 3. Theme 2: Participants' Perception of Shifting to an Internal Focus

In this experiential interlude, session attendees will explore a mind-body practice that facilitated this experience for many of the study participants, concluding with the opportunity to reflect on the practice and its implications for practice.

Theme 3: Experiential and Reflective Interlude

The third overarching theme, "Recognizing Transformation in the Dynamics of Relationship," depicted how individuals transformed themselves in and through relationships (see Figure 4). The first relationship that emerged was the structural coupling between the theoretical constructs of internal and external structures. This was most evident in the role-based relationships participants described with family members, colleagues, friends and others in the social context of external structures. Participants indicated that these role-based relationships in some cases supported and in other cases constrained the transformative learning process.
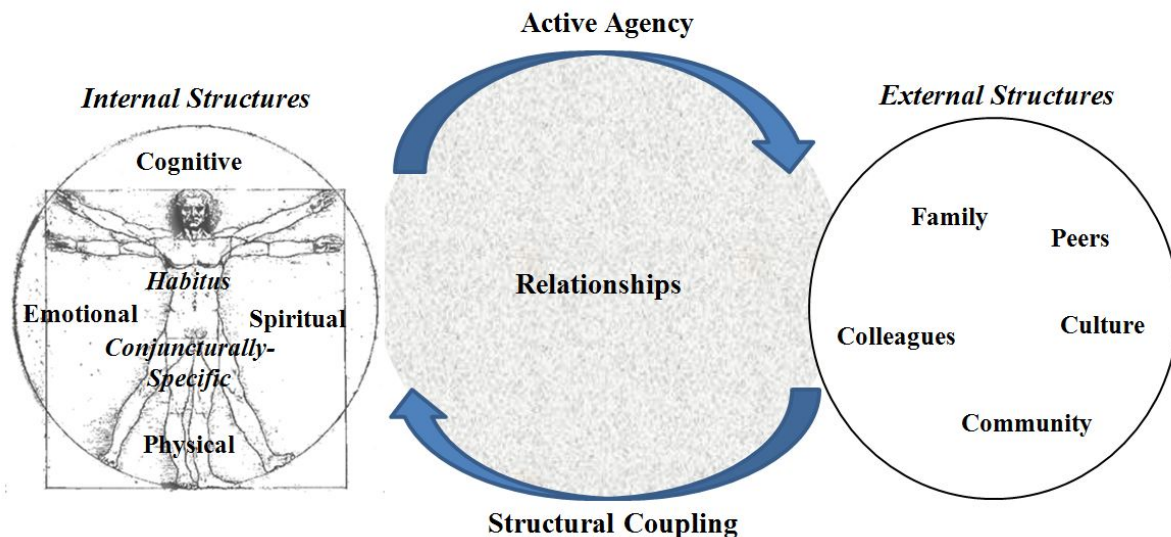
Figure 4. Theme 3: Recognizing Transformation in the Dynamics of Relationship

This final experiential interlude will incorporate both a mind-body practice and storytelling to explicitly incorporate the relational dimensions of the transformative learning experience. The interlude will conclude with reflection and sharing among small group participants.

Conclusion

In synthesizing the theoretical approaches of transformative learning (Mezirow, 2000) and strong structuration (Stones, 2005), this qualitative study (Kennedy-Reid, 2012) demonstrates a way to further theorize, research and implement practices to facilitate a transformative learning experience in the context of the interdependent relationship of the individual and the collective. The session brings this synthesized theoretical approach to life by communicating the results of the research study and allowing session attendees to experience first-hand how the holistic learning approach at the research site may have both fostered and helped individuals to sustain a transformative learning experience.

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Critical Reflection through Aesthetic Experience:
How could a wide range of learners gain access to the process?

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Abstract

The session approaches the following questions: What kind of artworks can unearth critical thinking? Can all works of art, without exception, serve such a function? Moreover, to what extent can learners, especially those who might not be familiar with cultural habits, have an intellectual and emotional access to the meaning of artworks? How could the ideas of Adorno, Bourdieu, Dewey, Freire, Greene, Horkheimer, Mezirow, contribute to the exploration of these issues? The session will combine a theoretical approach with an application exercise.

A. Description of the theory that guides the practice of the experiential session

Introduction

The contribution of aesthetic experience, as a means for the development of critical reflection on various issues that we explore, has been portrayed by many scholars. Among them, Dewey (1934 [1980]), Efland (2002), the theorists of School of Frankfurt, such as Adorno (1970[2000]), Horkheimer (1938[1984]) and Marcuse (1978) explained that aesthetic experience provides us with thoughts and insights that are distinct from the dominant ones and contribute to the critical exploration of the norms of social life.

During the last years, the importance of this issue has been increasingly recognized by scholars who developed the theoretical framework of transformative learning (indicatively: Cranton, 2006 Dirkx, 2000; Greene, 2000; Jarvis, 2006). They claimed that the exploration of artworks allows us to perceive various issues beyond the way that we consider as given.

However, what kind of artworks can unearth critical thinking? Can all works of art, without exception, serve such a function? Moreover, to what extent can learners, especially those who might not be familiar with cultural habits, have an intellectual and emotional access to the meaning of artworks? These are the issues that will be approached in this text.

The contribution of great art

I argue that, insofar as an adult educator frames his/her work into the theoretical context of transformative learning, the criteria he/she would use for choosing the artworks could concern the level to which they stimulate critical thinking.

But which works of art could be considered to meet this function?

This is an especially complex issue. Already from the end of 18th century, Kant (1790 [1995]) highlighted that the way we evaluate artworks is subjective. Our judgment cannot be based on evidentiary principles or rational arguments. It is not possible for a universally accepted norm to exist, according to which one is obliged to agree on the importance of a work of art or on the impact it could have on our thoughts and feelings. This Kantian argument is broadly accepted today by art theorists (e.g. Broudy, 1987; Efland, 2002; Perkins, 1994).

However, a way to approach this multidimensional issue is to search in the texts of the theorists who connect aesthetic experience to the development of critical thinking, in order to determine which sort of artworks are believed to best serve this purpose. For instance, the convergence of the ideas of Adorno (1970 [2000]), Dewey (1934[1980]), Horkheimer (1938[1984]), Greene (2000), Marcuse (1978) is impressive. They state that our contact with works of Bach, Baudelaire, Beckett, Beethoven, Cézanne, Goethe, Goya, Picasso, Proust, Rembrandt, Shakespeare, van Gogh and others could trigger a critical mode of thinking. It is therefore obvious that important theorists who studied the emancipatory dimension of aesthetic experience believe that this could occur when learners come in contact with artworks of high-level aesthetic value. In particular, Adorno, Horkheimer and Marcuse believe that this sort of artworks enrich the process of critical thinking much more than the trivial ones, given that they have an holistic and unconventional nature, they are susceptible to multiple interpretations and, also, they explore the human condition in depth.

The familiarization with significant artworks

However, is it possible for the vast majority of learners to have emotional and intellectual access to the aforementioned artworks or to others of high aesthetic value? Are Picasso's or Beckett's works as accessible as van Gogh's or Shakespeare's? Which are the artworks that are significant and at the same time can seem familiar to the learners who have been deprived of such an aesthetic experience?

Freire's and Bourdieu's ideas on the matter are particularly enlightening. Freire used sketches as triggers for the development of critical reflection on various social issues (Freire, 1970). He insisted that there should be a close connection between the content of the object used as a trigger (sketch or text) and the level of perceptual capacity of the learners. He claimed that if there is too broad a divergence between those two levels, then the attempt to understand the object is futile (Freire, 1998, 1st letter). For this reason, he used sketches of a clearly representational character which portrayed everyday life situations (Freire, 1970, 1971, 1998). However, these sketches were not conventional artworks, but were painted by "significant Brazilian artists" (Freire, 1971:114), with the evident intention to create an aesthetic experience as deeply meaningful as possible.

Bourdieu's contribution is also decisive. Through his works (1984, 1991) he highlighted the social causes of aesthetic dispositions. He claimed that social groups with cultural qualifications obtained through education but also, imperceptibly, through similar engagement within the cultural environment, show a positive disposition towards works of art considered to be great, as opposed to other social groups. They acknowledge the aesthetic value of those works and have the will to approach them. At the same time, they have developed the capability to decipher the codes of the messages that emerge from such artworks. On the contrary, those who were deprived of educational qualifications in their childhood, usually form a negative or a neutral attitude towards significant works of art, as they find it difficult to comprehend their meaning. In the final analysis, the richness of the reception of an artwork depends on the (socially determined) competence of the receiver to master the code of the message:

> Considered as symbolic goods, works of art only exist for those who have the means of appropriating them, that is, of deciphering them. An agent's degree of artistic competence is measured by the degree to which he or she can master all the means of appropriation of works of art available at a given time: in other words, the interpretative schemata which are the condition of appropriation of artistic capital, that is, the condition of deciphering the works of art supplied to a given society at a given time (Bourdieu & Darbel, 1991:39).

Therefore, those who do not possess the *'artistic competence'* avoid coming in contact with works of art of high aesthetic value[1]. Consequently, the use of this kind of aesthetic experience within educational settings is likely to discourage those learners who are not familiar with it.

On the other hand, Bourdieu did not formulate suggestions concerning the way in which the educational praxis could contribute to rendering the works of art to be accessible to participants. However, in his texts referring to the processes through which various social groups can be attracted or repelled by the artworks, we find a significant convergence with the ideas of Freire.

Bourdieu's reasoning concerning the attitude of those who have been deprived of a high- level aesthetic experience towards the works of art has three basic parameters. First, this social group formulates the disposition to investigate an artwork only when its content is clear and representational, in order for them to approach it based on their perceptual abilities:

When the message exceeds the limits of the observer's apprehension, he or she does not grasp the "intention" and loses interest in what he or she sees as a riot of colours without rhyme or reason, a play of useless patches of colour (Bourdieu & Darbel, 1991: 38-39)… For the most deprived, a work of art from which they expect an unequivocal meaning, transcending the signifier, is all the more disconcerning the more completely it abolishes (as with non-figurative arts) the narrative and representational functions (ibid: 41-42).

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[1] For instance, museums in France were visited every year in the 60's by 1% of farmers, 4% of workers, and 45% of 'higher social groups' (Bourdieu & Darbel, 1991: 15). A recent study in the United Kingdom (Arts Council, 2008) verified this trend.

For instance, when workers and craftsmen had observed the following photograph, which did not correspond to their realistic expectations, they expressed comments such as:

"At first sight it's a construction in metal, but I can't make head or tale of it (…) I can't make out what it is, it's a mystery to me."

"That is of no interest, it may be all very fine, but not for me. It's always the same thing. Personally that stuff leaves me cold" (Bourdieu, 1984:46).
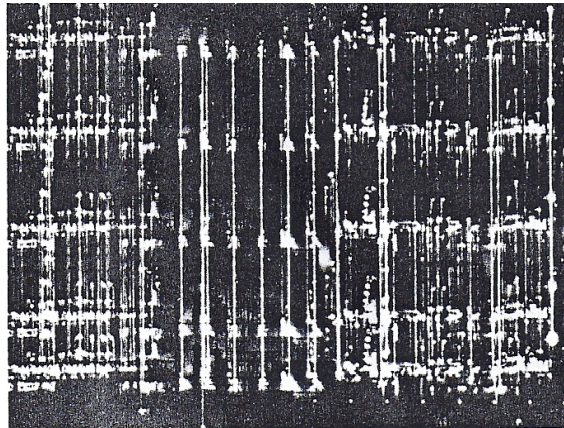
Secondly, learners who are not familiarized with the cultural practice, usually approach an artwork when they have an emotional interest. They seek human situations within the artwork which are drawn from social life and are related to conditions that they themselves face and thus stimulate the expression of their feelings. They seek, through the work of art, to taste the joys and sufferings of the heroes, to penetrate their lives, to become identified with it and to live it (Bourdieu & Darbel, 1991). For instance, when workers and craftsmen saw the following photograph they expressed comments such as:

"The old girl must have worked hard (…) I really feel sorry seeing that poor old woman's hands" (ibid: p.45).

Finally, those who are not familiarized with art, approach it with a practical interest. They seek messages in an artwork which are related to some social function and are of some usefulness. Two representative comments on the first photographs were:
"That is something to do with electronics, but I don't know anything about that."
"It might be something used in an electronic power station." (ibid:46)

The Method "Transformative Learning through Aesthetic Experience"
All the aforementioned ideas led me to suggest a method termed *"Transformative Learning through Aesthetic Experience"* (Kokkos, 2009, 2010), aiming to embody aesthetic experience in adult education, in a way that develops critical consciousness and involves a wide participation of learners. The method has been applied in several organizations in Greece, such as the Hellenic Open University, Second Chance Schools, Enterprises and the Therapy Center for Dependent Individuals. It was also applied in Denmark, Romania and

Sweden through the European Grundtvig Project *ARTiT: Development of Innovative Methods of Training the Trainers.*

In the next units I will present some suggestions as well practice examples from the project *ARTiT*, which deal with two issues linked with the challenge of the open access of learners to artworks during transformative learning processes: a) criteria of selection of the works of art that should be used, b) ways of active participation of all learners in the process of this selection.

The criteria for choosing the artworks

Based on what was mentioned earlier on the ideas of Freire, Bourdieu, Dewey, Adorno, Horkheimer and Marcuse, certain standards could be proposed relating to the selection of works of art in the context of transformative learning in a way that favors the participation of a wide range of learners at the process: the works of art that are used should be of high-level aesthetic value; it is important that the chosen works are comprehensive and appealing to the participants: the less they are familiarized with art the more they prefer the contact with artworks which are rather representational, have a non-abstract function and could arouse an emotional and practical interest. Moreover, as adult educators we should bear in mind that the exploration of artworks is not an end in itself within the learning processes, whose aim is not arts education: as shown by Freire, the meaning that the learners could draw from the artworks should be connected to the content of the issue at hand, in order for the artworks to function as triggers for approaching the issue critically. Therefore, we select works of art which are connected thematically to the assumptions that the learning group is working on and could challenge the stereotypical and conventional habits of mind.

The dimension of active participation

One of the basic principles of adult education is the active participation of learners throughout the learning process. Specifically, regarding the selection of works of art as learning stimuli, the adult educators should avoid imposing their views for two complementary reasons. First, because there are no objective criteria for the evaluation of artistic creation. Secondly, because certain participants may belong to different cultural groups and adopt their personal criteria.

Should an educator, therefore, propose works of art for critical reflection, according to learners' desire and criteria? An indirect answer lies in the work of Mezirow. He believes that it is quite common for learners at the beginning of a learning process to experience difficulties in recognising as their need the critical investigation of an issue; therefore, they express their desire for a practical, low-range approach (Mezirow, 1997: 8). As an example, he refers to parents who, from the whole range of parameters included in the issue of their child's learning difficulty, they only ask to learn about helping techniques in the school courses (ibid.). But, says the American scholar, adult educators are not neutral. They create opportunities for the strengthening of critical reflection and propose discourse to the participants, aiming to enable the most suitable integrated approach of the issue (Mezirow and Associates, 2000).

So, if we transfer this debate to the field of the integration of aesthetic experience with an aim at critical thinking, we can consider the possibility that some learners, using the criteria they adopted in the process of their socialisation, will not find attractive the works of art that their educators consider worth commenting. Therefore, they would prefer works from the cultural industry instead, incorporating and reproducing codes of the sovereign commercial cultural system (Adorno, 1970 [2000]). On the other hand, critically thinking adult educators are aware that the works of art that should be used should promote the critical mode of thinking. How could these two seemingly opposing, at a first glance, perspectives be combined without infringing the principle of learners' active involvement?

To begin with, there is no need to make a point about whether an artwork is valuable or not within adult education processes whose main objective is not arts education. Such an approach is sterile and could threaten the value system of the participants. It is therefore preferable to create a discourse which would focus on how the learning group could choose works of art that should spur critical exploration of the topic at hand.

Still, there is a great need to explain to the learners that works of art that can develop critical reflection are not only those existing in galleries and museums or mentioned in encyclopaedias. Such significant works of art can also be chosen among those that they know very well, such as folk poetry and painting or song lyrics by poets.

In any case, adult educators need to involve participants in the process of selecting the works of art. Five ways for learners' participation in this process are proposed:

- Educators suggest to participants a variety of works of art for critical reflection and participants identify and choose the works of art they prefer and the final order in which they will approach them.
- Educators suggest the sources where learners can find the works of art necessary to study different issues and learners identify and choose the works of art they prefer.
- Educators provide participants with criteria for the search and selection of works of art.
- Participants propose directly the works of art they prefer and then discuss their selections with educators in order to decide which of them will be chosen.
- Combination of the options a-d.

The final opinion on the selection of works of art and their meaning does not belong exclusively to educators or participants. A discourse takes place, examining all the arguments, the advantages and disadvantages. Educators support their views, but at the same time they are open to the ideas of the participants, encouraging the expression of alternative ideas and minimizing the use of their power.

Results from the method's implementation

The initial outcomes that spring from the implementation of the *ARTiT* project are encouraging (*ARTiT*, 2012). 212 people participated, coming from various adult educational settings, such as second chance schools, centres of popular education, rehabilitation units, prisons, vocational training units for unemployed people. At the beginning, participants were asked to answer the following question: "Do you like art?" The majority (57%) expressed a positive attitude, but another important percentage (43%) expressed a negative or unclear position.

At the end, project learners' attitudes were radically transformed. They were familiarized with the elaboration of works of art with high aesthetic value while enjoying the whole process at the same time: 81% expressed a positive attitude towards the method used.

Participants were also asked to further explain their answers. The results were as follows:

Explanation of the answer on Q: "Did you like the training through the use of works of Art?"	
Explanatory comments	%
The method was very satisfactory.	27%
Helped to understand better and deeper the different subjects.	24%
Led us to a new way to approach the subject.	14%
Promoted a creative/critical way of thinking.	11%
Provoked a more participatory and open learning process.	10%
Led to an unprecedented deeper understanding of art.	10%
Critical comments	4%
TOTAL	100%

It is obvious that many learners recognized that their participation in the project offered them the possibility to become familiarized with art and to recognize its contribution to the critical approach of the issues at hand. Some characteristic phrases:

"I was not interested in art, but it was interesting to realize that there are many things that I can learn from it."

"I was surprised to see how we can interpret a painting and how we can draw conclusions from this very interesting subject."

"I like it because I understood the meaning of the artwork and I have discovered new ideas and opinions."

During the process, participants explored works by Baudelaire, Breton, Degas, Hopper, Kahlo, Kavafy, Ozu, Plath, Rabelais, Rembrandt, Raffaello, Rockwell, Taviani, van Gogh, Welles, a.o. Those who, until their engagement with the project, were deprived of access to great art may consider this experience as a creative part of their life.

B. Description of the sessions' process

In the workshop, I will suggest to participants an application exercise, which includes the following stages:

a. Participants select an issue – from a variety of issues – to be explored.

b. Participants identify critical questions that should facilitate the exploration of the issue.

c. Participants select a painting– from a variety of paintings – which deals with the identified critical questions.

d. The group explores the meaning of the painting and connects it with the critical questions of the issue at hand.

Next, we will reflect on the aforementioned experience and link it to the rationale of the theoretical approach which was presented in this paper.

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How Action Learning Groups Can Contribute to Leadership Development and the Participants' Experience of Transformative Learning

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Abstract
This innovative, experiential session seeks to present the relationship between constructs of transformative learning and action learning. Kueht (2009) suggests that action learning is a catalyst for and contributes to transformative learning outcomes. This session explores the experience of participants in the context of an action learning group along with the application of action learning in a wide range settings for leadership development.

Action Learning as an Approach to Transformative Learning

Action learning could be an effective approach to fostering transformative learning because there are similarities between the skills required of each. Action learning is expected to improve skills such as questioning, listening, and giving feedback (Inglis, 1994; Marquardt, 2004; McGill & Beaty, 1995; Revans, 1998). Action learning is *reflective process*. Reflection is defined as "the ability to step back and ponder one's own experience, to abstract from it some meaning or knowledge relevant to their experiences" (Hutchings & Wutzdorff, 1988, p. 15). In action learning, participants are expected to learn how to support, collaborate with, and care about others by working with group members (Marquardt, 2004; Mumford, 1997; Revans, 1982). This may create a supportive environment in which participants can learn from each other. In turn, action learning is expected to improve participants' interpersonal skills such as building trust with others and building relationships (Inglis, 1994; McGill & Beaty, 1995). Action learning is based on the premise that no real learning takes place unless and until action is taken (Mumford, 1995).

This session explores the experience of participants in the context of an action learning group. The focus is understanding not only the cognitive process of making the transformation, but also the other aspects of the learning experience.

Definitions of Key Terms

Action learning: Action learning is "both a process and a powerful program that involves a small group of individuals solving real problems while at the same time focusing on what they are learning and how their learning can benefit each group member and the organization as a whole" (Marquardt, 1999, p. 4). In this session, Marquardt's (2004) framework of key components of action learning will be used:

> *Problem*: A problem, project, challenge, issue, or task of high importance to an individual, team and/or organization.

> *Action learning sets*: The group composed of four to eight individuals who handle an individual or organizational problem that has no easily identifiable solution.

> *Reflective inquiry process*: A process that emphasizes insightful questioning and reflection above statements and opinions. Because great questions lead to great solutions, the questioning process is emphasized.

> *Taking action on the problem*: The action learning group must be able to take action on the problem it is dealing with. The group members need to be given the power to act or feel sure that what they recommend will be implemented.

> *Commitment to learning*: Action learning places equal emphasis on the learning and development of individuals and the team, and on the solving of problems.

Action learning coach: An individual who helps the group members to reflect both on what they are learning and how they are solving problems.

Elements in Action Learning that Contribute to Transformative Experiences

There are several elements of action learning that contribute to participants' transformative experiences. Findings from Kueht (2009) suggest that participant, group, and coach contributions to the learning are essential for transformative learning to occur. These findings, based on a study of 16 self-selected baby boomer participants in action learning groups, are described below:

Contextual Conditions Influenced the Outcomes

Contextual conditions influenced the outcomes of the action learning group*,* and this confirmed the researcher's selection of an appropriate, comfortable setting that would be conducive to personal sharing and group interaction. The importance of context and the role it plays is well documented in the literature. Context is integral to key adult learning theories that have been incorporated into action learning (Marquardt, 2004; Waddill & Marquardt, 2003). Action learning has been aligned with the social learning theorists' assertion that a social setting that encourages social interaction with and observation of others is central to fostering learning (Bandura, 1977; Phares, 1980). Action learning provides a social setting, supporting Revans' (1982) belief that learning is social.

In 2007, Taylor examined Mezirow's (2000) interpretation of transformative learning, which re-affirmed that context has both personal and sociocultural implications. Taylor recognized a shift in focus toward making sense of the contextual factors that shape the transformative experience and how it can be fostered in practice.

Trust and Camaraderie Are Essential for Building Relationships in an Action Learning Group

One of the most significant findings was the participants' view of the importance of camaraderie and trust, which were central to their experience in the action learning group. Participants offered few negative comments about the group experience. The value of encouragement and support was critical. Participants shared their feelings, and expressed that the genuine support from fellow participants was welcome and rare. The action learning group served as a forum to discuss their situation and as an impetus to action.

This finding concurs with the action learning literature that has consistently suggested that the learning process is social, i.e., managers learn best with and from one another (Mumford, 1995; Revans, 1981); that action learning occurs around a group or set of four to eight individuals (Marquardt, 2004); and that members of a group, referred to as comrades-in-adversity (Revans, 1982) and fellows-in-opportunity (Mumford, 1995), benefit from the greatest diversity possible in experiences, functions, and personalities (O'Neil & Dilworth, 1999; Marquardt, 1999).

In transformative learning, Mezirow (1991) indirectly refers to relationships in the context of his rational discourse and consensual validation. Taylor (2007) also discussed the significant relational nature of transformative learning.

Commitment to Solving a Priority Problem and a Sense of Urgency Are Important

There were some salient characteristics of participants who appeared to reach or advance toward a solution. Those who were able to clearly articulate their problem or challenge, reframe their situations either objectively or subjectively (Mezirow, 1998) after some questioning from fellow group members, and commit to weekly action steps were the most satisfied participants with the action learning group experience. These participants also appeared to have a sense of urgency about realizing a solution. This was noted in the participants' weekly self-reports of actions taken and their reported satisfaction with their progress and accomplishment. For some participants, feeling a sense of accountability each week to the group created a sense of urgency and moved them to take some action.

These findings mirror Revans' (1997) proposition that individuals learn best while trying to resolve an unfamiliar, intractable problem with co-learners; McGill and Beaty's view (1995) that in action learning, individuals learn with and from each other by working on real problems and reflecting on experiences; and Yorks, O'Neil, and Marsick's (1999) argument that the foundation of action learning is "working in small groups in order to take action on meaningful problems while seeking to learn from having taken this action" (p. 3).

The findings also reflect the principles and elements of action learning proposed by Marquardt (2004). In action learning, participants solve a real business problem, project, or challenge (Marquardt, 1999; Pedler, 1997;

Weinstein, 1999), and learn best when taking some action (Marquardt, 1999, 2004) and working on a project of personal significance (Marsick, 2002; Mumford, 1995).

In the transformative learning literature, however, there has been scant evidence of a requirement to identify and solve a specific problem. For the most part, the theorists share the belief that transformative learning involves identifying, challenging, and altering preexisting assumptions, i.e., critical reflection (Argyris & Schön, 1978; Brookfield, 1990; Kegan, 1994; Mezirow, 1991). Transformations take time to evolve and are an ongoing process (Brookfield, 1986; Daloz, 1986; Kegan, 1994; Mezirow, 1991).

Asking Questions and Engaging in Discourse Helps Develop a Disposition for Learning

For participants, asking questions was challenging, unnatural, and uncomfortable. Some of the participants reported that they became more aware of their own resistance and the impulse to give advice, and they expressed in the groups how awkward or unnatural it was for them to pause, think, and construct thoughtful questions.

Most participants improved their skill in the art of asking thoughtful questions. Nearly all participants commented on how questions triggered thinking, reflection, and, in some cases, action. This suggests that learning was prompted when the act of asking a right question was a conscious process.

In the action learning groups, participants also learned about the importance of discourse to building relationships and learning. The participants spoke of being open to discussing their challenges, listening to one another, and being involved in the process. The participants reported that encountering an alternative point of view or a different perspective contributed to a change for themselves or others.

These findings agree with Marquardt (2004) who suggested that the action learning cycle is the same cycle proposed by Kolb (1984), which emphasized the balance between dialectically opposed dimensions, e.g., the balance between concrete experience and reflective observation. Action learning enables a balance to occur between action and reflection (Dotlich & Noel, 1998).

The findings also agree with Mezirow (1991) who envisioned rational discourse and critical reflection as the two key methods to achieve transformative learning. Rational discourse is an informed and objective assessment of the reasons, evidence, and arguments that lead to a tentative, consensual best judgment. Consensual validation is ongoing and subject to review by a broader audience. Mezirow (1995) saw full, free participation in rational discourse and critical reflection as a basic human right and as the main goal of adult education experience, one realized by the baby boomers in this study.

Asking Insightful Questions and Reflection Are Critical for Understanding and Problem Solving

In each action learning group some participants were skillful in asking insightful questions and were respected, influential, and acknowledged by others. During meetings and in follow-up interviews, participants remembered the individual who asked them the right question.

Insightful questions appeared to trigger introspection and changes in perspectives. Insightful questions and reflection are complementary skills. Reflection has been defined as "the ability to step back and ponder one's own experience, to abstract from it some meaning or knowledge relevant to their experiences" (Hutchings & Wutzdorff, 1988, p. 15).

The importance of questions is congruent with action learning, which emphasizes Q, i.e., questioning insight (Marsick, 1990; Mumford, 1997; Pedler, 1997; Peters & Smith, 1998; Raelin, 1999; Revans, 1997; Weinstein, 1997), rather than giving the right answers (Marquardt, 2004; Revans, 1998).

Most theorists believe that transformative learning involves identifying, challenging, and altering preexisting assumptions, i.e., critical reflection (Argyris & Schön, 1978; Brookfield, 1990; Kegan, 1994; Mezirow, 1991).

The Ability to Take Action Is Critical to Developing Confidence, Empowerment, and Learning

Participants reported taking action on a weekly basis. For some, this involved a noticeable change in demeanor and participation in the group. Participants appeared eager to listen to other participants' progress.

Mutual, weekly reporting was a positive reinforcement or incentive for others. For some, the report was a reminder to increase the pace and commit to action, based on a sense of accountability to themselves and one another.

Commitment to action makes a difference in the outcome and fosters transformative learning. Action learning is based on the premise that no real learning takes place until action is taken (Mumford, 1995), because one is unsure the action will be effective until it is implemented (Pedler, 1997). Action enhances learning by providing a basis for reflection. Comparing results of action against the assumptions or expectations of the action encourages reflection on assumptions (Revans, 1982). Action learning helps participants understand a concept intellectually, apply new skills, gain experience, and then undergo an inner development that leads to personal development (Marquardt, 1999, 2004; McGill & Beaty, 1995; Weinstein, 1999).

Changes in Thinking, Transitions, and Transformational Experiences Are Different for Each Person
Transformative changes for each participant were variable in content and scope. Mezirow (1995) stressed the importance of critical self-reflection in perspective transformation. Some of the participants experienced meaning making (Mezirow, 1996, p. 162) and others reported perspective transformation (Mezirow, 1991, p. 167).

Mezirow (1995) identified two types of transformative learning: 1) learning that results in new or transformed meaning schemes, or points of view, and 2) learning that results in transformed meaning perspectives, or habits of mind. Points of view and habits of mind are what Mezirow (1997) refers to as frames of reference. In this study, both types of learning were experienced by the participants.

Cranton (1994) is the only theorist who discusses how transformative learning varies among different individuals. Cranton admits that there are limitations to her research data, and suggests that transformation may be experienced differently among individuals of different personality types.

Change Is Continuous and Can Be Cumulative, Episodic, or Epochal
Participants described change in a variety of ways. Each had experienced at least one or more disorienting dilemmas, as specified by Mezirow (1978). These dilemmas included job changes, deaths, separations and divorce, illness, health crises, children leaving the home, business and financial challenges, and care for aging parents. In the action learning groups, these situations became the participants' presenting problems or challenges. How a participant viewed and interpreted his or her situation involved a complex interaction of conditions or frames of reference, as defined by Mezirow (1991). For some participants, the experience could be characterized as an epochal-type transformation while others might interpret it differently through reintegration. Some participants acknowledged what they called a "Wow" type of transformative experience. Some participants described what might be called cumulative transformations (Mezirow, 1991).

Lamm (2000) stated that cumulative transformations may occur when all participants experience a similar learning process (new awareness, verification, and practice) which seemed indicative of a gradual sequence of related changes in points of view. Lamm's description fits the participants' description of their group experience.

Finally, there were other changes that could be best defined as episodic, i.e., participants viewed their changes as separate, loosely connected episodes, limited in duration or significance.

The Action Learning Coach Is Important for the Successful Facilitation of Group Process
One of the six components proposed by Marquardt (2004) was the learning coach. A learning coach helps the group develop good process skills (Marsick & O'Neil, 1999; McGill & Beaty, 1995; Pedler, 1997) through questioning and reflection (Marquardt, 2004; Marsick, 2002; O'Neil, 2001). During the action learning group sessions, the participants commented on the value of a facilitator-coach teaching the process and guiding them to stay focused on asking right questions.

In action learning groups, participants have many opportunities to give and receive feedback on their behaviors, ideas, and presentations. Feedback is provided by learning coaches, set members, and sponsors. In response, participants are likely to increase or decrease the frequency of behaviors and ideas (Marquardt, 2004; Waddill & Marquardt, 2003). Although participants stated the coach was helpful, there was some resistance to the learning coach's direction, mandate to ask questions, and interventions to redirect the group process.

There seems to be consensus that educators need to help create democratic conditions and a supportive environment in which transformative learning can occur (Apps, 1996; Argyris & Schön, 1992; Brookfield, 1991; Cranton, 1994; Daloz, 1986; Kegan, 1994; Mezirow, 1991), while stressing the importance of teaching the explicit skill of asking the right question, rather than giving the right answers (Marquardt, 2004; Revans, 1998).

Action Learning and Leadership Development

Organizations are frequently looking for better way to develop their employees, especially leaders, while they are on the job. More organizations have discovered that action learning can provide this type of learning, because it enables leaders to develop knowledge, skills and capability while working on real problems in real time and with real consequences, and receiving feedback from others while practicing their skills.

Dilworth (1998, p. 28) observed that leadership development, as practiced by most organizations, "produce[s] individuals who are technologically literate and able to deal with intricate problem-solving models, but are essentially distanced from the human dimensions that must be taken into account." Dilworth also noted that action learning provides leadership skills that encourage fresh thinking, and thus "enable[s] leaders to avoid responding to today's problems with yesterday's solutions while tomorrow's challenges engulf us." McGill and Beatty (1995) point out that action learning provides managers the opportunity to take "appropriate levels of responsibility in discovering how to develop themselves" (p. 37). Typical leadership development programs, however, rarely address the social and interpersonal aspects of the organizations and tend to focus on tactical rather than strategic leadership (Lynham, 2000).

Most organizations that use action learning do so for the purpose of developing the leadership competencies of their organization. As Marquardt (2012) observed in their engagement and study of Microsoft:

> Action learning allows members to practice and develop leadership competencies, work together as high-potential teams, and learn to ask great questions as leaders, all while working on real, urgent business problems. In addition, leaders work with each other on their own challenges and problems in "action learning circles." According to Shannon Banks, director of Worldwide Leadership Development, the selection of great problems and the diversity of the teams were the keys to the success of the problem-solving projects as well as the development of leadership within Microsoft. (p. 159)

In closing, the findings of the researcher's work and ongoing work with action learning groups provide individuals and organizations with critical information about the potential of action learning programs for fostering transformative learning, and the impact of such programs on developing self-understanding, reflective action, inclusiveness, confidence, and the type of behavior change necessary for success in the 21st century.

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Not Just Brawn: A Case Study of Collegiate and Professional Athletes in Team Sports and the Role of Reflection-in-Action in their Learning

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Abstract

While athletes are interviewed about their performance, seldom are the questions and responses framed in terms of adult learning. Utilizing Schön's (1983) *reflection-in-action*, this study aims to identify and make explicit the learning athletes experience. Findings suggest surprise as a key trigger of reflection. Athletes indicate they reflect on themselves, their opponents, their teammates, and strategy. Reflection can lead to split-second decisions to either stay on course or deviate from a strategy or approach. Upon reflection, athletes may reframe how they make meaning of the competition altogether. Data also suggest implications for coaching practices and potential research on transformative learning.

Introduction

In a postgame interview on June 3, 2007, Derek Jeter of the New York Yankees was asked about recent troubles with the hitting.

Reporter: What's going to spark this offense?

Jeter: What's going to spark this offense? Some hits. That's pretty much it…. When things are contagious at times. Good hitting and bad hitting. Both of 'em are contagious. When we get a few guys rolling, I think we'll be alright. (YESNetwork, 2007)

What the reporter was hoping to induce from Jeter was a plan of action to help the team improve its performance. While learning from previous experiences to inform future action is integral to improvement, neither the reporter nor Jeter treated the issue as one about adult learning.

Buster Posey of the San Francisco Giants was asked on October 11, 2012 about winning the game that clinched the division title against the Cincinnati Reds.

Reporter: Take me back to your at-bat in the fifth inning. Two pitches. One you swung and missed at for the second strike. The next you hit for a grand slam. In between you seemed to step out of the box. Describe those two pitches and the conference you had with yourself.

Posey: I was a little anxious. You know, I think I chased that 2-1 fastball; it was out of the zone. So really, I just told myself to slow down, see the ball and, ah, put the barrel on it.

Prompted by the reporter's question, Posey offered a glimpse of what was going through his mind. In fact, it is apparent that he took stock of what was happening in the moment, backed off from the moment, and returned to the batter's box to complete the action. Although learning was clearly taking place, the reporter did not frame his question nor did Posey frame his response as one about learning. The intention was not to underscore how Posey

learned to adjust between pitches to hit the grand slam. Rather, it served to provide the viewers an "inside scoop" of the game's winning moment from a player's perspective.

Yet, framing athletes' experiences as learning is especially important for coaches. Coaches certainly need to be well versed in instructional approaches to help improve athletic performance, but these approaches are only as effective as how well the athletes learn them. Informed by the athletes' perspective as learners, the coaches' responsibility is not only to instruct the athletes but also to ensure they learn. As such, identifying and making explicit occasions of learning are essential to increasing an understanding of what athletes experience as learners and in effect, to informing the coaches' own practices.

Literature Review

Schön and Reflective Practices
Thinkers including Dewey (1933) and Kolb (1984) have considered how adults learn from experience. Through the process of reflective thinking, one can return to the experience, think and evaluate it, and construct knowledge. Schön (1983) terms this kind of process *reflection-on-action*, whereby a person conducts a kind of post-mortem on the situation and his/her reactions after the event, upon which s/he develops new understandings that inform similar future situations.

What distinguishes Schön's (1983) ideas on reflection from other learning from experience theories is his "focus on the construction of domain-specific knowledge in the context of professional practice" (Gilbert & Trudel, 1999, p. 2). Most of the time, a professional relies on his *knowing-in-action* to go about his/her daily work and "often reveals a 'knowing more than we can say'" (Schön, 1983, p. 51). However, when s/he encounters situations of surprise, uncertainty or uniqueness, s/he "reflects on the phenomenon before him, and on the prior understandings which have been implicit in his behavior. He carries out an experiment which serves to generate both a new understanding of the phenomenon and a change in the situation" (Schön, 1983, p. 68). This ability to think on one's feet and decide to make adjustments as the situation unfolds is what Schön (1983) conceptualized as *reflection-in-action*.

The focus on professional domains renders Schön's (1983) notion of reflection particularly fitting for this study on collegiate and professional athletes. In fact, he describes specifically how a baseball pitcher has a special feel for the ball and makes adjustments as the game progresses, similar to how other professionals "recognize deviations from a norm" or experience a "gnawing feeling that something (is) wrong" (p. 64) and try to "correct the 'bad fit'" (p. 52). Baseball players, like other professionals, learn to reflect on patterns of action and make on-the-spot adjustments.

Temporally, the duration of an action "may stretch over minutes, hours, days, or even weeks or months, depending on the pace of activity and the situational boundaries that are characteristic of the practice" (Schön, 1983, p. 62). In baseball, for example, an entire season can be treated as a bounded episode of action, and reflection between games, just as on-the-spot thinking in the batter's box, can be considered reflection-in-action. For the purpose of this study, though, reflection-in-action will be used to denote reflections bounded within a single game, match or race, as defined by the rules of the governing body of that sport.

Learning from Experience in Sports
While learning from experience to improve performance in sports has been an area of scholarship, the focus has been on coaches rather than on the athletes themselves. Gilbert and Trudel (2005) have explored conditions that influence coaches' reflective practices. Depending on the access coaches have to peers, their stage of learning as a coach, the degree of challenge of the coaching issue, and the environment, the coaches engage in varying degrees of reflection. Knowles, Tyler, Gilbourne and Eubank (2006) have studied six graduates of the Coaching Science degree at Liverpool John Moores University in the UK. Through interviews, the researchers explore how coaches define reflection, overcome barriers to reflection, perceive issues in written reflections, and describe reflection with other coaches. Culver and Trudel (2006) have similarly examined how coaches learn and grow as a community of practice (Wenger, 1998). In aggregate, these studies point towards the notion of coaches learning through reflective practices to benefit their athletes.

Even when the literature focuses on athletes' learning, it is often prescriptive in offering strategies for coaches. Davies (2010) utilizes Kolb's (1984) learning cycle to suggest questioning strategies to stimulate reflection and to generate information for directing subsequent practices. Wikeley and Bullock (2006) modify Kolb (1984) to conceptualize a learning cycle for coaching.

One Dutch study on athletes age 12-16 finds that those competing at the international level reflected more on their learning process and on past performances than their national level peers (Jonker, Elferink-Gemser & Visscher, 2010). Specific to adults, Richards, Mascarenhas and Collins (2009) describe the integration of reflect-on-action principles with an elite hockey team. Subsequently, "a shared understanding of the situation together with an individual clarity on what each player needed to do" (p. 353) resulted. These studies indicate the outcome of reflective practices but do not shed light on the actual learning process from the athletes' perspective.

Statement of Problem

While the literature has documented efforts to guide athletes to reflect-on-action, less is known about reflection from the athletes' gaze. Even more, a gap lies in understanding how athletes reflect-in-action. Snippets of their reflective practices are captured in interviews, but seldom are these practices explicitly framed as episodes of adult learning. A central problem, then, resides in the paucity of emphasis and knowledge on how athletes learn and specifically how they reflect *in* experience especially when encountering surprise (Schön, 1983). Practically speaking, coaches and even trainers and managers can improve their athletes' performance by gaining an understanding of not only how they reflect-on-action but also how they reflect-in-action.

Purpose of Study

The purpose of this study is to explore how collegiate and professional athletes in team sports learn *in* experience. Specially, the investigators will seek to understand how athletes reflect while immersed in the experience itself. That is, the aim is to explore how athletes reflect-in-action informed by Schön's work (1983). As such, the guiding research question is: How do collegiate and professional athletes in team sports describe reflection-in-action as part of their learning process? The sub-questions are: (a) What triggers their reflection? (b) What do they reflect on? (c) What is the outcome of their reflection?

Methodology

Participants

The authors recruited participants for this study via convenience sampling through professional and social networks. Initial outreach was sent to over 500 individual email contacts, ten different list serves, and social media websites (Facebook, Twitter, and LinkedIn). In addition, established relationships with collegiate athletic programs were used to recruit potential participants for this study. Participants were not compensated.

The participants include three male athletes and one female athlete. The male athletes competed in track & field, football, and doubles tennis. The female athlete competed in softball. Pseudonyms are used to ensure confidentiality of all participants. Jason competed on a community college track & field team; Noel competed on a four-year university football team; Peter competed on a community college tennis team, and Chloe on a community college softball team. Each played a minimum of two years on their collegiate teams. The current ages of the four participants range from 22-35. Preliminary collegiate participants represent one portion of intended participants; professional athletes will also be recruited for further research.

Although tennis and track & field may have individual competitions, members are still part of a collective team, which practices, trains, and ultimately competes together. A second feature of these athletes, is the notion of a student - athlete. All participants were enrolled as students in full-time course loads, 12 credits or more. Noel was the only participant to receive a sports scholarship, which he subsequently relinquished due to academic ineligibility. Presently, Jason is the only participant who is competing in collegiate athletics as a transfer student at a four-year senior college. Peter, Noel, and Chloe describe their collegiate experiences from three years ago to 14 years ago. Peter and Noel continue to play their respective sports recreationally, while Chloe no longer participates.

Procedures

One in-depth interview was conducted for each participant. The four interviews total were conducted over a six-month period. Interview questions were developed by the authors' research on sports and adult learning coupled with their overall interest in the sports experiences. In addition, questions were guided by Schön's reflection-in-action model (1983). Finally, the interview protocol was discussed with the authors' doctoral advisor, an expert in adult learning and leadership.

Interviews were conducted in-person with each athlete. On three of the four interviews both authors were present. Interviews were conducted in or near New York City at Teachers College, Kingsborough Community College, and a local Starbucks, lasting from forty-five minutes to one hour and fifteen minutes. The study used a

qualitative approach for research methodology to examine participants' experiences, reflections, and learning involved with competition. The goal is to get a better understanding of how athletes adjust and learn in the thick of competition.

The interviews were tape-recorded, transcribed, and distributed to the authors for coding. One interview was deemed inaudible and not fully transcribed. Identification of key themes was conducted after five iterations of each transcript by each author and guided by Schön's model of reflection-in-action. After each author conducted their initial coding, an hour and fifteen minute conversation on emerging themes was conducted to discuss the results.

Results

The findings from this study suggest significant reflection-in-action takes place during competition. Themes around what triggers the reflection, what these athletes reflect on and outcomes based upon these reflections have become apparent.

Reflection Triggers

In resonance with Schön (1983), a key trigger of reflection is encountering *surprise*. Specifically, it is often surprise in relation to their opponents. Peter comments on his opponent's ability, stating,

At the start of the match the first game is very important to us because you don't know how your opponent hits so we usually try to check out different players how they hit and how they react to different shots. And then after that we just build on it if things change we change our strategies

Peter also describes how he reflects when surprised by his *own* mistake,

You think in your head like, "oh crap" and then after that you know what type of shot you made. Then if you know your opponent well you know what type of shot they will make. You either move to one area or you move back to the back of the courts…, but if you don't know your opponent, the only shot is to go to a neutral position….

Both examples demonstrate the athlete's adjustments in the thick of competition as a result of their active thought process triggered by surprise. One such surprise was the caliber of the opponent. Peter did not know what to expect with each shot and needed to engage in learning until he gained a familiarity with the opponent. The other example of surprise was Peter's own mistake. In reaction, he had to think on-the-spot to determine how best to compensate.

Reflection

The preliminary findings suggest that athletes reflect on themselves, their opponents, their teammates, and strategy. Reflection of the athletes' own skills and abilities, their opponents' skills, reaction and ability of their partners/teammates and whether to stay with or change strategies and approaches to each competition is evident. Noel describes his assessment of self as his "readiness to play." Chloe recalls an assessment of her skills as the following,

I just learned how to slap and we were behind, it was like the ninth inning and people were on second and third and then the coach was on third giving the signs and gave the sign for the slap and I remember thinking, like, holy crap I don't know if I want to do this right now because I haven't mastered it yet.

On the surface, this seems like an emotional reaction to the task at hand. However, this can also be interpreted as reflection-in-action, as Chloe was surprised by her coach's instruction to execute the slap. She then turned to reflection as self-assessment to inform the action she was about to take.

On one occasion, Noel reflects on the opponents' superior abilities,

We didn't know…this guy was a legit NFL superstar and he came in and squashed every hope that we had…. The adjustment I made is the realization that they were better than us. I shouldn't be as mad as I am.

In this example, surprised by his opponent, Noel reflected in the thick of the game. Rather than adjusting how to play on the field, he decided to reframe the meaning of the game and, as a consequence, his emotional reaction.

Reflection Outcomes

Findings suggest reflection-in-action can lead to athletes deciding in the moment to stay on course or deviate from their initial strategy or approach. Peter once decided to "forget about the strategy…. Hit (the ball) as hard as you want anywhere." These split second decisions have resulted in adjustments that have led to victory, a crucial turning point in competition, or a sense of pride and accomplishment. Chloe describes the sense of accomplishment when she finally made an adjustment with her "slapping" the ball with the following,

> …I was kind of humble or whatever because I was not like, oh, I was fabulous. We won because of me and stuff. I was just like, wow, I can't believe I did that, that was pretty cool and then it was on to the next.

Reflection can also influence how athletes make meaning of the game. Chloe comments that upon realization how much better the opposing team was, they reframed their mindset such that winning was no longer the goal. She explains, "If we earn one run we'll be okay…." This is similar to Noel's emotional shift upon reflecting the game was no longer winnable.

Implications

Reflective Practices

The study has led to potential questions for future inquiries surrounding reflective practices. How does the particular sport account for reflective practices? In particular, what are similarities and differences in how athletes reflect-in-action depending on the sport? A second area of interest revolves around the roles and relationships with teammates and coaches. How does the relationship with teammates and/or coaches facilitate or impede reflective practices?

Yanow and Tsoukas (2009) advance Schön's (1983) work by articulating different kinds of surprise and awareness based on their phenomenological study. Future research can aim to identify more precisely various kinds of surprise and to distinguish more finely the nature of reflection-in-action athletes engage in.

Transformative Learning

The study has also revealed implications within adult learning and, in particular, transformative learning. The data suggest there were indications of disorienting dilemmas (Mezirow, 2000) throughout each athlete's careers. This has raised the following questions in relation to transformative learning. Data have indicated that injury has played a role in three of the four athletes careers. How does injury play a role in transformative learning? Moreover, how does departure from the sport, especially when not by choice, play a role in transformative learning?

Practice

The study also has practical implications for coaching. Secondarily, the study lends contribution to much broader adult learning practices for both researchers and practitioners. Specifically, how can coaches, trainers, and managers help athletes learn to make on-the-spot decisions? From this study, reflection-in-action is about decision-making. How can videos be used as a tool not only to reflect-on-action and to prepare for specific opponents but also to simulate situations where athletes have to reflect-in-action and make decisions right there in the moment. And how can this be applied to a much broader scale of adult learning?

Conclusion

Often times, the media and sports fans are eager to get a view of what is happening inside an athlete's head. However, seldom are athletes framed explicitly as adult learners. Without understanding the process that allows athletes to learn and adjust sometimes within seconds, coaches have insufficient information to help them improve. This study has provided foundation and insights on reflection-in-action practices within sport competition. The authors will continue their study with collegiate and professional athletes to increase their understanding and to surface other emerging themes.

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The Making of Wisdom:
Journeying through the Transformative Fire of Immigration
to Living in the 'Third Space'

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Abstract

This paper presents preliminary findings from a Canadian action research study that used arts-based methods to derive data related to the transformative learning of first and second generation immigrants. This study revealed some orthodoxies, but also presents an integrated form of transformative learning and challenges existing thinking about the connections between culture, identity and transformative learning. Specifically, this paper describes the transformative process of moving toward dynamic cultural hybridity, that Homi Bhabha (in Rutherford, 1996) calls living the "third space", or transculturality. This often manifests as wisdom.

Introduction and Purpose of Study

This paper presents preliminary findings from a Canadian action research study related to the transformative learning of first and second generation immigrants. This project used arts-based research activities to derive research data and facilitate cooperative data analysis. The study, Social-Emotional Capacities in a Multicultural Context (2010-2012), examined the capacities that were activated during the immigration process and identified as most successful for societal integration and inclusion. The immigration process, particularly among visible minority groups, is profoundly transformative in ways that can be positive and negative. As well, the ways of being and ways of knowing of newcomers can, at times, deeply challenge existing norms in the receiving country. These findings reveal an integrated form of transformative learning but also challenge existing thinking about the connections between culture, identity and transformation. Specifically, this paper describes the transformative process of moving toward cultural hybridity and dynamism, that Homi Bhabba calls, living the "third space", or we shall call transculturality. As the participants describe, this requires integrated social, emotional, cognitive, and spiritual development, often manifesting as wisdom.

Context and Related Theory
Multicultural Brokering

Since 1994, the Multicultural Health Brokers Co-operative (MCHB) in Western Canada has grown from 12 to 54 brokers, who, as natural leaders and community mobilizers in their ethnocultural communities, are trained to be health educators and advocates to address service gaps within the health system. Taking a holistic approach, they blend culturally-responsive education and community development to empower the immigrant and refugee community to access the services they require. They also provide culturally responsive training for Canadian-born service providers. Thus, "cultural brokers" are individuals who are "insiders" within a certain ethnocultural community and help link this community to the "outside" world. Jezewski (1993) defines cultural brokering as the act of bridging, linking, mediating between groups and persons of differing cultural backgrounds for the purpose of reducing conflict or producing change. For the MCHB, they build bridges between social service professionals, immigrant parents, ethnocultural communities, and the broader society with the goal of achieving equitable access to social services and successful inclusion into Canadian life.

Transformation and Immigration

Many cultural stories contain the archetype of the hero/ine who departs on a physical journey spiraling through emotional, spiritual and physical crises, internal and external threats, meeting allies along the way and undergoing a re-birthing, as well as a return to community with fresh perspectives that invigorate and guide (Campbell, 1949). These stories resonate powerfully with immigrant newcomer families struggling to redefine relationships and identities. Ortiz (2003) identified a common four stage settlement pattern, despite the motivations for immigration: home country; leaving and landing; survival and settlement; and slow transition to integration. The third stage, survival, is surviving the process of establishing a new home, new work, new language, new social networks and cultural transition. The fourth stage are feelings of disappointment and marginalization as newcomers

realize that employment appropriate to their education and access to public services are much less than they imagined.

This study attempted to understand the transformative learning processes of the fourth stage, namely successful inclusion and integration. In the psycho-critical approach, the primary four stages in transformative learning are: a disorienting dilemma; critical questioning and scanning for new options; a commitment phase; and the integration phase (Mezirow, 1991). Dirkx (2006) takes a Jungian approach where the goal is soul work to achieve integration of the conscious and unconscious parts of the personality. From a Navaho healing ritual, McWhinney and Markos (2003) discuss liminal space as part of the archetypal cycle of death/rebirth, a crossing of the threshold into "no-place", facing darkness and despair. The third approach is the emancipatory transformative learning centered on conscientization of one's socio-political context (Freire, 1970). Homi Bhabha (1990) proposes two concepts related to this study: *translation,* where a culture is always dynamic as a symbol-forming practice, and *hybridity*, which does not acknowledge the essentialism and fixity of two original cultures from which a third develops, but a 'third space' where the traces of meaning are ambivalent, negotiated and represented into something new and unrecognisable (Bhabha cited in Rutherford, 1990, p. 211).

Wisdom and Learning

Both Tisdell (2011) and Basset (2011) differentiate between knowledge and wisdom, citing that wisdom has a quality of integration whereby age, life experience, and various cognitive, affective, and reflective capacities interact to enhance life meaning and common humanity. Often associated with age/aging, the 'wisdom paradox' refers to the loss of brain processing speed and focus, amidst the increased capacity for expansive sight and complex problem-solving (Goldberg, 2006). Nevertheless, it is also the non-age related ability to learn from life experiences (Jarvis, 2011). Basset (2011) suggests that there are several domains in wisdom: the *cognitive domain* characterized by discernment, objectivity, and holism; the *affective domain* characterized by respect, openness, acceptance, empathy, generosity, and multiple-perspective-taking; the *reflection domain* characterized by self-transcendence, seeing self in complex systems, and tolerating ambiguity and paradox; and the *active domain* characterized by societal engagement and sound judgements based on justice (Basset, 2011). Erikson's (1950) eighth stage is ego integrity where integrity is moving past love of ego toward self-acceptance, defending human dignity, and the virtue of wisdom. Guindon (1992) offers a moral development theory that includes spirituality: Stage 5 as an interindividual stage based on humanist ethics and genuine intimacy but adds a Stage 6 of integrity and responsiveness based on generous reciprocity and transpersonal love. Swartz (2011) suggests that practices of meditation and mindfulness can foster wisdom, as can embodied practices involving shifts in states of consciousness, through music, visual art, dance and theatre. Although we can teach for wisdom, Jarvis (2011) asserts "there is a profound difference between knowing about wisdom and being wise – for being wise is an ontological condition…" (p. 92).

Participatory Action Research and Arts-Based Methods

Participatory action research (PAR) was the methodology chosen as it allowed study of how understanding and learning develop in the midst of action and involves participants in the study design (McTaggart, 1997). The theoretical framework is critical hermeneutics where a social psychological analysis of individual actors and their web of language and symbols are embedded in a macrostructural analysis of social systems (Morrow, 1994). The multicultural brokers wanted to reflect on their personal and collective histories as well as generate knowledge that illustrated processes of hybridity. To explore this, we co-developed three arts-based workshops that served as iterative data collection. Eight brokers participated in all three workshops – originating from Cuba, Cambodia, Iraq, Vietnam, Philippines, Lebanon, Pakistan and Japan. At the first workshop, storytelling and creating a visual dragonfly eye mosaic identified necessary capacities. In the second workshop, two masks were made illustrating conflicting identities and ongoing internal and external dialogues. Finally, a third workshop used the 'gates of wisdom' metaphor from Arrien (2007): "Throughout history, images of thresholds and gates have served as symbolic passageways into new worlds" (p. 9), where the thresholds are the crucibles in which transformation occurs (p. 7). A three-gated physical pathway was constructed and participants identified locations on the journey where each capacity developed and the kind of learning process involved, subsequently discussed in a focus group.

Preliminary Findings

The findings revealed a common incremental three phase process of transformation for newcomers, dependent on the age at immigration and prior socioeconomic and cultural context. The phases were perforated and dynamic.

Gate One: Disorientation

Gate One was the phase of disorientation, as arriving families experience culture shock and a growing recognition of difference. For children, this comparison process in school was subtle – from the clothes they wore to their lunch food to their cultural celebrations. For some, the difference was "in your face daily" through bullying, physical abuse, and offensive remarks (S, 2011: 296-300). The witnessing of their parents' mistakes in the new culture and negotiating one culture at home and one at school, created a conflicted self. One woman explained, "I have two faces…when I come home I be a Vietnamese girl…just to please them. But when I'm at school, I dress differently, bring my clothes extra. I put some make-up on. Just to feel like I'm belonging to them" (L, 2011: 52-59). Another woman said she learned to comfort herself and how to deal with her own anger and emotional turmoil, yet, she began to reject her home culture to fit into the Canadian culture, common among many participants. The Filippino community told her that, "I was a coconut: brown on the outside, white on the inside. And then you're kind of rejected from your home culture…you kind of don't belong to either…you don't feel like you have the same values as your own culture" (R, 2011: 28-35). One woman explained that her biggest struggles as a child were her emotional feelings, "I was always so confused…trying to build your confidence up so you're not emotionally stressed out, that was hard…feeling angry…why can't we be the same?...I wasn't ready to always kind of clarify who I was and where I came from…and I got sick of it as a child (N, 2011: 731-740). One young man was instructed by his parents to not refer to Cambodia in conversations, not to label Canadian-born people as racist or discriminatory, and not to put one's self into situations of victimization. Rather he was instructed to see the greater good in people and rely on translating their culture, so others would understand. A young Japanese man felt shame about his parents and he dissociated from the culture causing severe family tension. He joined a musical subculture bringing him into contact with bicultural musicians but an unhealthy "underground society" (T, 2011: 391).

The adults who had high expectations for an easier life, were quickly dashed. They felt loneliness and shame from not knowing the language and customs of the new country, particularly in front of their children, and sometimes not being able to provide appropriate food and shelter. While they understood the significant challenges, their social unsureness and the degree of difference was often overwhelming, leading to a loss of confidence, "Here in many cases I don't know if what I'm doing is correct or not…that get me frustrated…you are receiving feedback but you aren't able to decode it…you feel disoriented (A, 2011: 224-227). An Iraqi woman says, "So the parenting was very different…from what I learned to do…I start to find out that I am not a good mom. I was very confused. I was not knowing what to do" (S, 2011: 117-121). There is a profound sense of loss on many fronts, "I lost my job, I lost my status…I had to deal with my poverty, not employing, not having good social skill, how to deal with the culture and no language" (SB, 2011:630-636). Even though a Cuban man came with an innate trust of people, professional skills, and a strong identity and knowledge of self, this was dislocated as the new culture gave him "an assigned value…we have value in our country; but when you are here in this labour market, you have different value…a very, very low value…my first strategy were to increase my value…but it doesn't depend on your skills. You have to have some kind of certificate" (A, 2011: 162-176).

Gate Two: Liminal Space

All of the newcomers entered into a liminal space of deep cultural questioning, internal battles with emotions, desires, and values as well as external social issues. Eventually the young people were able to find bicultural peer groups and explore the nature of values in each culture. One participant saw the generosity of her family as motivated by the desire for community status. She began to reinterpret her parents' teachings and assume a different motivation, to support and help others from the heart. She began to listen deeply to other cultures, and to understand what hatred and anger yielded. She began to transmute the negative experiences by "mak[ing] it into positive, more understanding and accepting, and be tolerant instead of hold onto something that you hate or you angry about" (L, 2011: 500-513). Staying rooted in some cultural traditions, she was open to the new ways of being, a syncretic approach. She owned her culture but on her own terms. An Iraqi woman explains she is proud of her youngest son, "He is the most Canadian one in our house…he know how to find his way between the two cultures. He's a very smart boy. He know how to be Kurdish, Iraqi, Muslim…and he know how to navigate himself to be fully Canadian…in his own way of course" (SB, 2011: 603-612). The participants described this as learning to constantly adjust strategies, be sensitive, and work hard to decode meanings, all through a deep reflectiveness. The

young Vietnamese woman explained that she also began to identify role models for her life, someone to "look up to…to lead me" in a learning process. The Cuban man explains that they never encourage people to identify themselves as victim or survivor…[which] brings a kind of negative satisfaction…but as learner. He calls this being present to others, this learning, this flexibility as "human literacy…how to interact with other people." (A, 2011: 859-866). The Cambodian man agrees "…that's the great thing that's helped me in my life. I believe everyone is learning…and I think for people like ourselves, what we do very well is we nurture that…supporting people unconditionally with no judgment" (S, 2011: 933-953). After all the pain they each had experienced, they agree "We know that people are good beyond anything they can do to us" (A, 2011: 1038-1039) and that "my journey [has] so many sweetness, so many love that flow into, make me who I am today" (L, 2011: 1043-1044). This sense of self as learner is undergirded by self-acceptance, "…we're okay with who we are…you accept who you are right now" (S, 2011: 1064-1068). The Lebanese woman says the turning point is "the whole learning experience, accepting who I was, accepting being different, and then being proud of it…and then teach others that (N, 2011: 229-232).

Gate Three: Integration and Generativity

In Gate Three, participants entered a stage of integration and generativity. One man began to see that his parents were preaching and practicing a different kind of spirituality. "I don't see how sitting quietly for an hour will help you. Now I've learned….so the deep quietness and listening is helping….This is the big one…I can forgive other people" (S, 2011: 366-398). The Japanese man gravitated to Christianity, "I start to explore society with a new sense of that I needed, something spiritually that guides me, that grounds me and that I can face society with (T, 2011: 405-410). He felt "I really opened up my eyes…I got introduced to…[becoming] a volunteer 'cause I realized I wanted to help people (T, 2011: 408-415). He saw the beauty in his own traditions "creating a different relationship to it" (T, 2011: 433-437). He moved beyond blaming his parents, "Mistakes needs to be forgiven is my main point" (T, 2011: 823-826). He expanded, "That was probably the most transformational part of my life…starting to work with people that probably experienced things in some similar ways to myself" (T, 2011: 994-997). Similarly, the Pakistani man said, in "meeting people…and seeing how they incorporated religion, values, and culture in their life and did it in a seamless way…that prompted me to embrace faith… Yeah, that transformation was basically learning an ownership state and building a community on my own terms with people in the same boat as myself…and teaching this to children" (O, 2011: 935-954). Letting go of the hate, anger and disassociation was most possible by "discovering faith, God, forgiveness and love…to heal…transformation was finding a new purpose and support for my life…I wasn't trying to do it for me anymore" (T, 2011: 1021-1030). The identification of their special ability to interpret multiple cultural realities, led naturally to "this kind of third space - of shifting to helping others" (R, 2011: 71). One of the leaders describes a "magnified sense of 'beauty hunting'" in the brokers, "it's not even guided. It just comes out…we cannot describe it in language but we know what it's like and we try to draw it out, we try to support it" (Y, 2011: 777-784). These are examples of ego loss, assuming a mentor role and embodying the capacities of forgiveness, flexibility, empathy, and multiple perspective-taking, recognized as wisdom.

Preliminary Analysis

First, the findings point toward integrated transformative learning. They affirm Mezirowean psycho-critical transformation through common stages and movement toward integrated, permeable and inclusive perspectives. The Jungian approach explains the extrarational learning – emotional, symbolic and archetypal – fostered by both internal and external dialogue, moving through despair and loss toward discernment, ego transcendence and a transpersonal sense of Self. These findings affirm the social critical approach where participants are conscientized to their socio-economic-cultural positionality, agency, and participatory uses of power. Second, these findings illustrate a dialectical process where intercultural antagonism and interpersonal conflict create ground for growth and how they foster capacities like forgiveness and unconditional love. Third, these participants underwent a nonwestern transformative process that was more a spiritual process involving character cultivation, ethical conduct and the creation of harmony (Yang, 2011). The attributes developed were a profound sense of communality, trust in humanity, respect for ancestors, elders and the young, and constant openness (Green Fareed, 2009) alongside a counterhegemonic awareness of structural power and marginalization. Fourth, the transformative moment was the moment of taking up mentorship, an ontological shift that embodied these attributes. Fifth, transformation is profoundly relational and ripples through webs of connections, as a continuously social referential process, which the brokers nurtured through mirroring, nonjudgment, and invitational questioning. Sixth, culture and identity is flowing and syncretic, always hybridizing through the translation of cultural codes, a transformative and particularly conscious dialogue of meaning that creates this third space, exemplifying transculturality. The simultaneous sense of belonging and uniqueness is the lived paradox. Seventh, third space living is fluid but can be fostered by special

places of liminality, where people enter a place apart to learn, to face the dark side, to find allies and guides, and aspire to higher moral qualities. Eighth, wisdom is not a static acquisition but an ongoing process of heroic learning that integrates the emotional, cognitive, social and spiritual. Ninth, arts-based processes and archetypal metaphors/stories can tap this often tacit knowledge, providing a process of representationality with and beyond words. Tenth, integration/inclusion of immigrants into Canadian society is fundamentally fostered through a learning way of being, where society itself needs to become a learning being.

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The Entrepreneurial Learning Curve: Transformations of Immigrant Woman in Germany and Canada

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Abstract

The following paper documents my development of a grounded theory about the learning processes of immigrant women entrepreneurs. I've developed a learning model that consists of four learning phases throughout which female entrepreneurs transform their frame of reference during the process of becoming a business owner. This process demonstrates their transition from a *work-related self-concept* to an *entrepreneurial self-concept.* Additionally I've observed that this process tends to include an altruistic concern for others. Several interviews with subjects in both Germany and Canada back up my observations on these aspects. The phases of learning will be discussed using the framework of the transformative learning theory.

Introduction

Immigration to Germany has a long history; the number of migrants reached its peak during the waves of recruited guest workers in the 1960s and '70s and was followed by a period of family reunification once a ban on recruitment was implemented. As a result, Germany now has a considerable population of immigrants (see stat. Bundesamt Deutschland). The label of "immigrant" or "foreigner" often presents additional obstacles to finding success in German workplace. Researchers have long recognised the potential and the diversity of this group (see Westphal 1997, p. 63). However, it took Germany until 2005 to openly view itself as a "country of immigration". Issues surrounding governmental and social support for these immigrants and, their participation in the German labour market have always been the subjects of much social policy discussion in Germany (Plahuta 2007, p. 2). Increasingly, a specific sub-group is targeted with assistance and support: Immigrant women entrepreneurs.

The Canadian take on multicultural policy registers at the other end of the spectrum in comparison to Germany. In regards to the formal support of immigrants, and more specifically, the support of fledgling immigrant entrepreneurs, the Canadian infrastructure offers a plethora of seemingly accessible educational opportunities. After extensive interviews with female entrepreneurs it is clear that Canada's social policies and attitudes toward its immigrant population make that country fertile ground upon which to contrast Germany within the theoretical sampling of my grounded theory.

It can be assumed that the learning curve of launching a company and becoming an entrepreneur happens within formal, informal, and non-formal frames. At present, research is inconclusive about how informal and non-formal frames of learning about how to become an entrepreneur occur, where they take place and what subjective importance they carry. No detailed descriptions of the sequences of these learning processes based on pedagogical learning terminology exist at present. Therefore, I've decided to work on that research gap: My research focuses on the transformative learning processes of female immigrant entrepreneurs. This group of entrepreneurs is richly diverse in terms of individual surroundings and socio-cultural contexts, both of which influence the learning process.

In the following paper, I will outline the initial results of a grounded theory I am developing: I have identified four different learning phases; Within those, a further four aspects of learning can be observed which provide a roadmap of the process of transformation that the women undergo throughout the four learning phases. The learning process concludes with a significant transformation of the worldview in phase four. In this phase, I've observed that women typically develop an e*ntrepreneurial self-concept*.

For the purposes of this paper, I will only examine the aspect of "altruistic concern for others", phase four, with data from Germany and Canada. Thereafter, I discuss my results through the prism of the theory of transformative learning and Mezirow's steps of an ideal-typical learning process (see Mezirow 2009). The paper concludes with an outlook and analysis of my findings.

1. My Study

This paper serves as a report of my work in progress of developing a grounded theory (see Corbin/Strauss 2008³) on the learning processes of immigrant women entrepreneurs. My aim is to illustrate and explore their trans-

formative learning processes from before and during their first entrepreneurial endeavours until such a time that they have consolidated their enterprises for at least two years and therefore can be considered "successful" entrepreneurs.

As a means of gaining insight on the perspectives of these women, I have conducted narrative-style interviews (see Schütze 1976) with 15 women entrepreneurs of different nationalities, fields of work and migration backgrounds (first or second generation)—11 in Germany and four in Canada.

In the following, I will briefly outline the learning model I have developed from the data so far.

2. Learning Model

The learning model consists of four different learning phases within which four aspects of the frame of reference *work-related self-concept* transform into the frame of reference *entrepreneurial self-concept*.

The Learning Model: Transitioning into an Entrepreneur
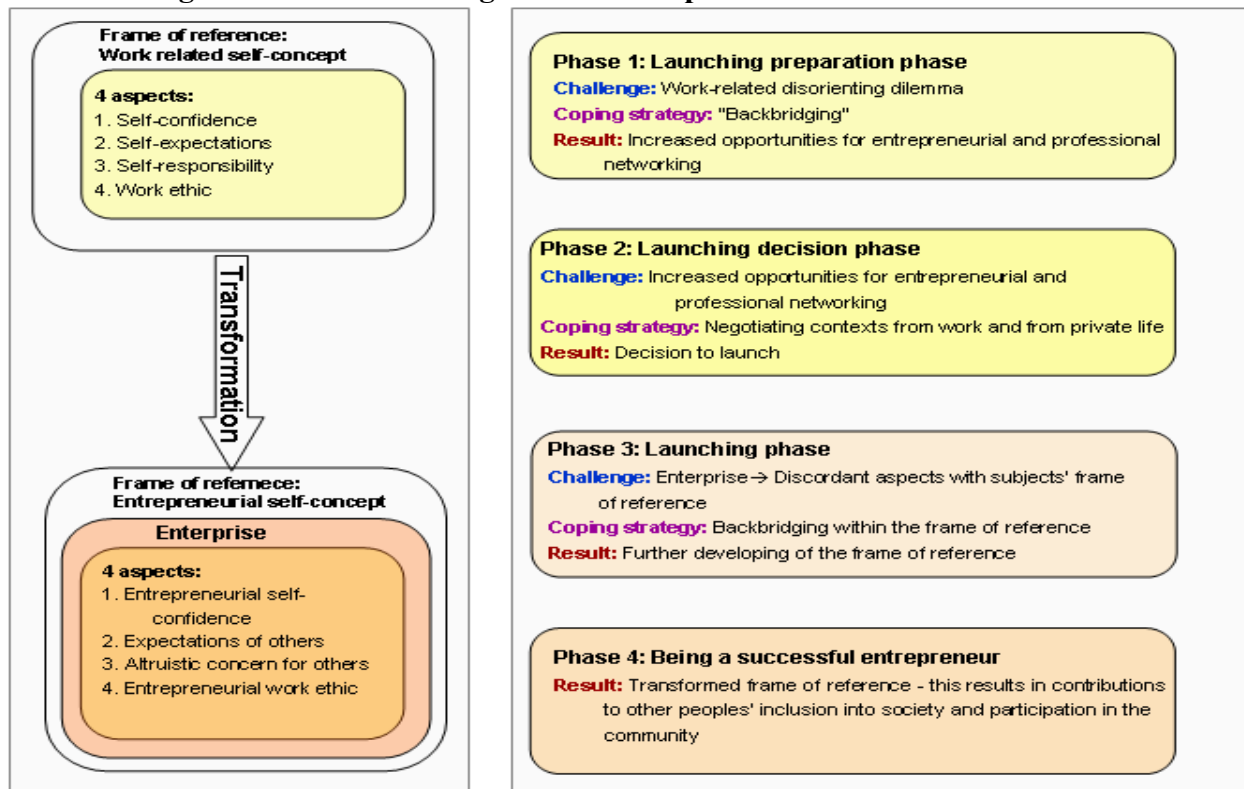
At the beginning of the learning process, *work-related self-concept,* the greater frame of reference, can be subdivided into four aspects: 1. Self-confidence, 2. Self-responsibility, 3. Self-expectations, 4. Work ethic. Throughout these four learning phases, aspects of the frame of reference *work-related self-concept* continuously develop. These aspects transform in phase four: 1. Self-confidence becomes an entrepreneurial self-confidence 2. Self-responsibility results in altruistic concern for others 3. Self-expectations transform into expectations of others 4. Entrepreneurial work ethic replaces old ideas about work. Consequently, the greater frame of reference, *work-related self-concept,* ultimately transforms into *entrepreneurial self-concept*.

The first learning phase is the "launching preparation phase." The central challenge during this phase is the experience of a work-related disorienting dilemma. A coping strategy on how immigrant women in my study handle this challenge is the so-called "backbridging" strategy: relying on social and professional backgrounds that boost confidence, thereby building a "bridge back," or a supportive structure. Opportunities and coincidences concerning possible entrepreneurial activities result from phase one.

The second learning phase is the "launching decision phase". Opportunities that resulted from phase one transform into central challenges for foreign woman seeking to become entrepreneurs—she must decide whether or not to pursue available opportunities. Discussing a possible entrepreneurial endeavour with someone from her direct individual surroundings helps in coping with this challenge and can generate more confidence-giving support systems. The result of phase two, then, is the decision to become entrepreneurially active.

Within the first two phases, the women experience disorienting dilemmas and the four aspects of their *work-related self-concept* become further empowered.

Phase three, the "launching phase," is characterized by the lack of entrepreneurial knowledge and the challenges therein. Women cope with this through "backbridging" within the different aspects of the greater frame of reference. The result of phase three is a differentiation of the aspects of the *work-related self-concept*.

Phase four is the phase of "being a successful entrepreneur." At this point the women have learned their role as entrepreneurs and the transformation from the *work-related self-concept* and its four aspects into the *entrepreneurial self-concept* becomes obvious. The key result is the differentiation of worldviews, which includes the additional sense of altruism. This impacts the contributions that can be made to inclusion and participation by the entrepreneurs to their respective communities.

In the following, I will further discuss the primary characteristic of the fourth learning phase: altruistic concern for others. I examine this aspect through analysis of data gathered from subjects interviewed in Canada and Germany.

3.   Two Cases

The two chosen cases involve immigrant women who worked as employees until they launched their own companies. Neither had any language issues as a result of the native tongues of their home countries.

4.1 Case 1: Catherine—an Indian Entrepreneur in Canada

Catherine is an Indian chef/restauranteur in the centre of a metropolitan Canadian city, who immigrated to Canada for private reasons. Today, she is a successful business owner and her restaurant is very profitable. As an entrepreneur, she developed an altruistic concern for other people, which is not motivated by economic gain.

4.2 Case 2: Lisa- a Russian Entrepreneur in Germany

Lisa, a Russian-German teacher with a doctorate in German studies and who used to work at a university in Russia, immigrated to Germany for private reasons. She experienced a sense of exclusion as she started applying for a job—neither her diploma nor her qualifications are recognised in Germany leaving her feeling rejected as a result of her accent. Focusing on her own talents, she created her own opportunities by launching a language school. Today, she is the owner of two language schools that offer a varied set of classes.

As an employer, she finds herself giving immigrants a chance at employment so they do not experience the exclusions as she did. As an entrepreneur, she developed an altruistic concern for others and facilitates her customers' participation in the German system.

4.   Example—Phase Four of the Learning Model

At the beginning of the entrepreneurial learning process in phase one, the immigrant women focus, through self-responsibility, on the connection of money and work. This self-responsibility is an aspect of their *work-related self-concept*—they want to take responsibility for themselves. Once they've established their business there seems to be a trend toward developing a heightened sense of altruism. Owning and operating a brick-and-mortar business seems to provide an ideal opportunity for entrepreneurs to facilitate their own inclusion into the communities in which they work, regardless of their social standing otherwise.

One important aspect of the immigrant women's' learning process is their own integration. As they become successful entrepreneurs, economic aspects become less important and social participation in their business' community becomes central. In this fourth phase, as the narratives and other data suggest, these women take a greater stake in not only creating their own opportunities for inclusion, but creating opportunities for others as well, commonly through altruistic acts.

5.1 Case 1: Catherine's Altruistic Action

According to Catherine, the Indian entrepreneur in Canada, her spirit of altruism focuses on people in her community and makes her feel integrated. "… You reach out to events in the community, and that makes you part of it … a year ago there was a house fire, I don't know who the people were but I called them up I said, 'we have a restaurant, we cook, well, anytime.' That makes you really feel that you are part of this community and the greater country as a whole … the restaurant really gave us a channel to be more active in the community and to reach out far more." By engaging with her community as a businesswoman, Catherine feels like a part of, not only of her community, but also of national community. This is her way to become a part of Canada, not only as an entrepreneur but also as an individual. In this way, we can easily see just how much entrepreneurship offers opportunities for integration within a larger community. In this way, the scope of entrepreneurship exceeds the economic sphere.

5.2 Case 2: Lisa's Altruistic Action

Because Lisa views the German system as too exclusive and restrictive to an immigrant's access to gainful employment, she does what she can to create opportunities for inclusion for other foreigners. As an entrepreneur, she has created a culture within her company that takes responsibility for her clients' successful integration into German society. These acts of good will extend to helping her clients cope with xenophobia and supporting participation within the German society. "We have a young man from Gambia … He took a literacy class … he is so slow and during the exams, there are time limits. The teachers told me if we had five hours instead of one and a half, he would pass. He is slow, but now, he knows how to read and write. While others read two pages, he has read one sentence … So I allowed him to attend the class one month for free … I have a certain responsibility." Out of a sense of ethical duty, Lisa not only helped a struggling student, she bore the expense for his continued education. She, too, views herself as having found her place in Germany through being an entrepreneur: "I am not working on the moon [laughing]. I have a network here … I am in the middle of things and therefore a part of the society. I integrated myself with force and power into this society even though most people did not want that." As an individual, Lisa had to fight for her integration against the majority of society. However, as an entrepreneur, her status is elevated because of her work, creating a greater amount of opportunities to participate in society.

As successful entrepreneurs, Catherine and Lisa both have developed an altruistic concern for others not motivated by economic gain, instead have extended themselves in ways that cost them money. Here, the transformation of their self-responsibility within the first learning phase into the altruistic concern for others within the fourth phase comes into full effect. Furthermore, both women feel a greater sense of inclusion through their entrepreneurship.

5. Discussion

These two cases reinforce what Mezirow (1990) outlines within the theory of transformative learning: within learning processes that involve adapting to a new role, learners reorganise existing perspectives. This exceeds the economic sphere and includes the person within her different contexts (business and private) (see Clark/Wilson 1991). Mezirow's 10 steps of an ideal-typical learning process occur within the different learning phases I have outlined.

Both women highlight aspects of these contexts and are living proof that while this entrepreneurial learning curve is significantly challenging, it's also very much a strengthening influence.

Mezirow points out 10 steps of an ideal typical learning process:
1. A disorienting dilemma;
2. Self-examination with feelings of fear, anger, guilt or shame;
3. A critical assessment of assumptions;
4. Recognition that one's discontent and the process of transformation are shared;
5. Exploration of options for new roles, relationships, and actions;
6. Planning a course of action;
7. Acquiring knowledge and skills for implementing one's plans;
8. Provisional trying of new roles;
9. Building competence and self-confidence in new roles and relationships;
10. A reintegration into one's life on the basis of conditions dictated by one's new perspective (Mezirow 2009:22).

In each learning phase, different steps of Mezirows' ideal-typical learning process occur.

Challenges at the beginning of each learning phase within my model can be seen as disorienting dilemmas, which happen on different levels as the learning process proceeds. While at the beginning, there is a fundamental disorientation related to work, in the second phase, subjects face a dilemma concerning the decision of whether or not to launch a company. As the learning proceeds in the third phase, disorientation is closely related to challenges that are connected to a lack of entrepreneurial knowledge.

These steps of disorientation are closely related to and build upon each other. This is just one framework through which to view the transformative learning theory and its interdependencies among the different learning phases.

Through these two women's' stories, I have highlighted an aspect of learning phase four and its connection to altruistic action—entrepreneurship evoked this transformational process which benefits a greater swath of the community than just the subjects themselves.

Here, Mezirows' steps nine, "building competence and self-confidence in new roles and relationships," and 10, "a reintegration into one's life on the basis of conditions dictated by one's new perspective," are closely linked to each other. Through the action that the entrepreneurs take, the combination of steps nine and 10 could be supplemented by an 11th step. That additional step could theoretically show that learning a new role (9) and the attainment of a new worldview (10) will result in a heightened likelihood for altruistic-driven action, or at least creating a greater stake in finding a place within the community. Furthermore, "reintegration into one's life" exceeds the economic sphere as it also includes the entrepreneurs' integration into society through entrepreneurship.

Conclusion and Outlook

This study illuminates the complex learning processes of immigrant female entrepreneurs by focusing on informal and non-formal learning. Learning seems to start in phase one on an individualized level and progresses to wider horizons that eventually exceed the economic realm and sometimes even affect others' lives in phase four.

As my research progresses, I will further examine my learning model, however, I need to consider how I can enhance my research by looking at the context and "particular community of inquiries" (Clark/Wilson 1991: 82), which are not an explicit part of the theory of transformative learning.

For adult education, the grounded theory of the learning processes which I am developing within my research could have implications for unsuccessful entrepreneurs, people who are interested in launching a business venture, unemployed people, et cetera—for immigrants and the general population alike.

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Awakening Creativity in Sacred Landscapes:
A Transformative Learning Journey

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Abstract

Immersion in sacred landscapes can inspire creativity and offer powerful opportunities for transformative learning. This paper is based on a residential workshop in the high desert of Abiquiu, New Mexico. Self-identified artists came to Ghost Ranch (home of Georgia O'Keeffe) to immerse themselves in the red rocks for a week. They learned to slow down and pay attention to their surroundings, enter liminal space, make connections between outer geography and inner landscape and new ways to transform perspective.

Sacred landscapes have always had the power to draw people in, in mysterious ways. They call us to pay attention to our natural surroundings and if we heed the call, there is much to learn. Fredric Lehrman (1988 p. 6) writes about sacred places:

> Enchantment is not to be measured. The fact stands that people are drawn to these [sacred] spots, have strong meaningful experiences here, and go away transformed and renewed. . . Upon entering the zone of a scared shrine, an ancient and wonderfully subtle sense of reverence is called forth, asking for silence and respect. If we heed this signal, and rest with it patiently, we may find ourselves rewarded with a gift of knowing.

This paper is based on learning that occurred at a week-long residential workshop that I recently facilitated at Ghost Ranch, in Abiquiu New Mexico, entitled *Awakening Creativity and Spirit: Inspiration from the Land and the Spirit of Georgia O'Keeffe*. Ghost Ranch, with its red rocks, aromatic sage and vast desert landscape is truly a place that inspires creativity.

The O'Keeffe Mystique

Georgia O'Keeffe became captivated by the "unexplainable thing in nature" (Coombs, 2003) after her first visit to Ghost Ranch in 1930. She felt called to spend significant time there to work on her painting. This was the beginning of O'Keeffe's transformative journey. In a letter to husband Alfred Stieglitz in 1940, she wrote: "When I got to New Mexico that was mine. As soon as I saw it that was my country. It fitted to me exactly." In another letter to friend Dorothy Brett, she related: " The country seems to call one in a way that one has to answer to it." (Cowart, Hamilton and Greenough, 1987 p. 53). O'Keeffe responded to the call by returning each summer for a number of years, and eventually making it her permanent home after Stieglitz' death in 1949. The desert landscape called to her and inspired some of her greatest works. For example, she created many paintings of *Pedernal*, a dark haunting peak in the Jemez Mountains. She half jokingly stated, "It's my private mountain. . . it belongs to me. God told me if I painted it enough, I could have it." (Lynes, Poling-Kempes and Turner, 2004 p. 80). While seemingly arrogant of O'Keeffe to claim ownership of a mountain, this declaration speaks loudly of her personal connection with a sacred landscape and the inspiration to create that it engendered.

Hart (2000, p. 31) describes inspiration as a form of "transpersonal knowing" or a shift to a higher level of consciousness. Inspiration comes from some place deep within when one shifts from rational linear ways of thinking to more intuitive modes. "Inspiration is the poet in the process of learning, the prophet beholding the voice of God, the artist hearing the Muse, and the 'ordinary' person becoming, if only for a moment, extraordinary" (p. 33).

In 2001 I visited Ghost Ranch for the first time. As I sat on the ground, photographing cactus on the Kitchen Mesa trail, I too experienced that unexplainable thing in nature. I sat riveted in that one spot for a very long time feeling an incredible sense of well-being and a strong connection to the sacred. This feeling also inspired creativity and "flow" or complete absorption in an activity where one loses track of time and space, and creative work seems to emerge without conscious control. (Csikszentmihalyi, 1996) Flow is an automatic; effortless yet highly focused state of consciousness. In a flow state ego and self-consciousness disappears, there are no judgments or fear of failure as one is not in one's head. It was clear that there was something very significant about this experience. Mezirow (1991) describes a disorienting dilemma that is often a catalyst for transformation. Often this dilemma is triggered by a crisis or unexpected event. While I did not experience a crisis, I certainly felt disoriented. The experience was personally transformative in that my sense of self shifted from autonomy to

connectedness with the natural world. I also began to define myself as an artist as opposed to someone who just liked to take photos.

Theoretical Underpinnings

While Mezirow's original concept of transformative learning was based on critical reflection and rational discourse, other authors have pointed out that it also has emotional (Dirkx, 2008), embodied (Lawrence, 2012) and spiritual (Tisdell, 2003; Lawrence and Dirkx, 2010) dimensions. The creative arts along with sacred landscapes provide ideal opportunities where transformative learning is likely to occur.

This paper is based in O'Sullivan's (2002 p. 11) broader definition of transformative learning that is described as a "deep structural shift of consciousness" which includes not only self-knowledge but also "our relationships with other humans and with the natural world". In his most recent writing, O'Sullivan (2012) emphasizes our current planetary crisis and the deep transformation needed if we are to survive on Earth. He calls for an interspecies consciousness recognizing that we are part of an interconnected web of life and a need for a holistic integral educational agenda. If we are to survive as a species we need to think differently about these relationships and look systemically at our contribution to climate change and other environmental disasters. While I can't claim that creating relationships with sacred landscapes automatically brings about this shift in consciousness, as Helen Caldicott (1992) stated, "Unless we connect with the earth we will not have the faintest clue why we should save it."

The Workshop

As an adult educator I am well aware of the power of learning from experience in the "field". I decided to create a workshop to be held at Ghost Ranch where artists, musicians and writers could experience the transformative powers of the place and awaken creativity and spirit by connecting with the landscape. Eight individuals participated in the six-day residential experience. The group included women and men from across the United States. Mornings consisted of experiential activities both inside and out of doors including guided visualizations, art activities, and practice observing the natural environment. Afternoons provided time for individual work (painting, writing, drawing or photography), optional hiking, rest or reflection. Participants were offered light suggestions such as "Think about a story that wants to be told and tell it with your art" and "use paint, dance or poetic expression to express your dream images". We came together again in the evenings to share individual experiences and reflect on insights. As typical of residential experiences, learning not only occurred during formal class sessions but also continued as part of informal conversations during shared meals and walks between residences, our classroom and the dining hall. (Lawrence, 1999)

The Lessons

Spending significant time in this sacred landscape did indeed inspire creativity and for some, the seeds for transformation were planted. We (and I include myself) learned many lessons including: The power of immersion experiences, liminality, perspective, slowing down and paying attention and connecting with our interior terrain through the physical geography. These lessons are described below.

Immersion

One of the many benefits of a residential learning experience is having time away from the distractions of everyday life and the luxury of totally immersing oneself in the learning experience. (Fleming, 1996; Lawrence, 1999) Being immersed in a beautiful landscape certainly added to the experience. I don't believe the same flow of creativity would have occurred had we been sequestered in a conference hotel. As Linnea (1999, p. 49-50) expressed:

> Only a return to the grand, soothing, often subtle rhythms of nature- the rising and setting of the sun, the whisper of wind in the trees, the solidity of a mountain, the eternal motion of the sea can draw me back to the well of my creativity.

Some participants came with a clear agenda of what they hoped to accomplish during the week away. A few experienced a sense of frustration or feeling "overwhelmed" by the vast landscape and intense beauty of the mountain scenery. It was difficult to settle into the surroundings. Eventually they gave themselves up to the land, immersed themselves into the experience, let go of judgment and opened themselves up to what the land could teach them.

Liminality

Liminality is described by Bolen (1999, p. 59-60) as:

> Threshold experiences that occur at the boundaries or growing edges of the psyche. This is where visible and invisible worlds overlap--- the land of the soul. This is where individual consciousness and the collective unconscious meet and merge—where creative ideas and work are birthed.

Some people refer to these liminal experiences as spiritual. The earlier experience I related at Kitchen Mesa was such an experience. I also experienced this liminal state when we visited a restricted area on the ranch where Georgia O'Keeffe lived and painted. It is an embodied state that cannot accurately be described in words. There I was at the very spot with the same mountains and petrified trees that appear in so many of O'Keeffe's paintings. Our guide was showing us the paintings and giving historical background but I was no longer listening. I stood in awe and felt the presence of Georgia and how her "creative ideas and work" were birthed decades ago. I experienced a shortness of breath and a quickening of my pulse. I took several photographs of that space and felt very resistant when it was time to leave. Sacred landscapes like the ones at Ghost Ranch just seem to invite these threshold experiences. Many of the participants who came were hungry to deepen their spiritual connections as well as their artistic abilities. The rich landscape helped them to do this.

Lane (1998) used the term "fierce landscapes" to describe the high desert region in New Mexico that brought him to the depths of his soul. "The emptiness here is vast, the silence at first disconcerting, though it sinks its way slowly into the soul" (p.3.) So too, the workshop participants gradually began to allow the landscape to sink into their souls. One participant described it as a shift from feeling separate from one's environment to being " an integral part of that "bigger Process' . . . I was part of the earth, the sky, trees, people, the soul." Lane (1989) draws connections between habit (where one lives) and habitus (how one practices a way of being). In the Ghost Ranch experience the habit and habitus, the knower and the known became one. There was no separation. As they became more aware of their environmental surroundings they become more self-aware.

Transformation of Perspective

Mezirow (1991) described perspective transformation as a change in worldview reached by critically reflecting on our assumptions. Participants in the workshop experienced a literal perspective transformation. As they climbed higher up the mountains they could see perspectives from above ground level and began to realize the limitations of their normal way of looking at the world. They began to think about the world from the perspective of a hundred year old tree or a centuries old mountain, or even how the smallest ant might view the world and they began to acutely feel the intimate connections between humans and other beings. This insight is not new. Indigenous educators have always emphasized our connection with nature. As Cajete (1994 p. 93) stated: "Journeying to that sacred mountaintop, one can begin to envision a sense of relationship, not only to oneself and one's community, but also to the natural world". While Cajete was using the mountain as a metaphor, the Ghost Ranch landscape allowed for participants to learn this lesson experientially.

Slow Down-Pay Attention

Many of us get so caught up in the chaos and busyness of our everyday lives that we rarely stop to take notice of that which has been in front of us all the time. At Ghost Ranch there were many reminders that helped us learn to pay attention. One day I hiked by myself on one of the mountain trails. While I had been on this trail before, I kept getting "lost" that is I would lose the path of the trail. At one point I had to climb over a large hill where I had to use my hands to keep from falling as the loose sand shifted beneath my feet. When I took the time to slow down I realized that if I couldn't see an obvious trail I was probably not on the right path. After all, the hike was not designed as an obstacle course. Once I backtracked a bit and caught up with the trail it seemed so obvious. There were even human footprints that marked the way. I decided I needed to pay more attention to my surroundings. I thought about how much in my life I neglected to really listen to somebody or stop and notice the scenery because I was too focused on where I needed to be and how much time it was taking to get there.

As the participants began to slow down and pay attention they noticed many things that they had at first passed by without seeing. One woman became fascinated with the large anthill "mountains" and began wondering about the ants that lived there. Another took notice of the similarities between the barbed wire fence and the sharp-needled cactus. Still another was mesmerized by the dreamy ethereal clouds that hug in the air over the ranch.

Individually these objects found their way into the participants' artwork. Collectively we learned how much we miss everyday and how different life can be when we just take a few extra minutes to pay attention.

Connections between Physical Geography and Inner Terrain

There is something about sacred landscapes that helps us to connect with our deepest self. As Lane (1998) suggests, the vast emptiness of the desert can be seen as a metaphor for oneself. Perhaps there is a need to empty oneself and unlearn that which is not serving us well in order to gain access to new learning. "The experience of threatening wilderness invites us to the unexplored landscapes of an inner geography where that which is most deeply 'us' is joined to what we experience as radically Other" (p. 101). I believe Georgia O'Keeffe discovered this as well. One of her paintings *From the Faraway, Nearby* shows an enormous deer skull sitting on top of mountain peaks. The disproportionate size of the skull to the mountains along with the title of the painting seems to suggest interconnections between the distant landscape and that which is in front of one's eyes. The connection goes even further when one also considers what is behind one's eyes. As the workshop participants spent more time on the land, they gradually made connections with the outer world and their interior psyche. Observation of the landscape helped one to reflect inward. Likewise, deep inner reflection helped one to see more clearly what was present in the physical space. One woman wondered whether the mountains, trees and sky present from every direction were calling to her to pay attention to her interior self. For many, this new knowledge became evident in their artwork.

Conclusion

Lane (1998 p. 194) tells us "the desert answers to deep needs of the human spirit. Something in us requires its presence". Georgia O'Keeffe felt this call to the desert landscape and indeed many of the workshop participants did as well. Lane further asserts: "There is an unaccountable solace that fierce landscapes offer to the soul . . . beyond language, beyond human control, beyond all that is safe, one encounters a great beast prowling the edges of uncertainty" (p. 216). Perhaps this uncertainty is what Mezirow (1991) referred to as a "disorienting dilemma". Maybe we need to literally put ourselves in these wild places in order to create the dilemmas that open us up to the potential for transformation. The subtitle of this paper is *A Transformative Learning Journey*. The experience at Ghost Ranch is just the beginning of the journey. Transformation usually happens after a great deal of reflection. I suspect the reflection will continue. Sacred landscapes however have a way of getting into one's soul and calling one back again and again.

The Presentation

This interactive experiential session shares lessons gleaned from the workshop through discourse, visual imagery and poetry. Participants will engage in creative and imaginal activities based on visits to natural areas. The last part of the session will be an interactive discussion about the intersections of transformative learning theory, creativity and sense of place.

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Setting the Stage for Transformative Learning: The Women Professors of Adult Education Retreat Experience

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Abstract

Sustained residential experiences in peaceful natural settings can offer unexpected opportunities for transformative learning for groups and individuals. This paper describes a series of retreat experiences that women professors of adult education engaged in over a fifteen-year period. The physical environment, creative and spiritual intention, time away from distractions, a supportive community of woman, shared leadership, a sense of play and synergy all contributed to creating a space to promote transformation.

In 1996 a group of 20 women adult education professors gathered at a small gulf-side resort in Galveston Texas for a retreat. The purpose was for professional development, collaborative reflection, networking, dialogue, creative expression, friendship and renewal away from the distractions of university life. Not only were existing friendships and professional associations renewed and strengthened, but new relationships, alliances, and long-lasting friendships formed. In subsequent years, some of the same women who attended the first retreat, and others new to either the field or the group, met in a wide variety of locations including: a former monastery in rural Minnesota, a religious retreat on the Outer Banks, the lake-side home of one member in Michigan, the Highlander Research and Education Center in east Tennessee most recently on at Gretchen Bersch's Yukon Island Center for Research and Education south of Homer, Alaska in the Kachemak Bay.

The activities engaged in during the retreats have consistently centered on three areas: professional and casual discussions and reflection focused on professional challenges and opportunities; creative collaboration; and increased awareness and appreciation of our natural environments. The conversations and reflections have sometimes focused on emerging issues in our field, new texts and manuscripts in progress among us, institutional challenges, or career or personal development as professional women. We've helped one another through career challenges of new and lost positions, closed academic programs, births and deaths of family members, health crises, and personal celebrations. Other important elements of our retreats have focused on nurturing of self and others. We've prepared delicious meals for one another splurging on fine local foods and wine; we've nurtured ourselves with massages, meditation, saunas, exercise, and music. Among the greatest enjoyment we've received from our retreats has been our interaction with various natural environments in the many locales where we've met. We've hiked in preserved forests, strolled on white sandy beaches and farm fields, kayaked and swam – all the while benefitting from an increased awareness of our natural resources and greater physical and mental health.

One of the truly special activities of our retreats has been the creative collaborative projects undertaken each time we met. Different women took charge of the idea-generation, implementation, instruction, and motivation involved in a wide variety of projects. The first collaborative project resulted in quilt with a square contributed by each woman, then 'pieced' onto a single large piece of muslin. Other creative initiatives have resulted in clay bead necklaces and beaded bracelets, paper mache masks, decorated frames for group photos, painted rocks signed by members, and small muslin 'dolls' dressed and decorated to reflect our perceived psyches.

Those who have been a part of these retreat experiences agree that there is something magical that takes place in these spaces as we engaged in dialogue and critical reflection as well as storytelling and other embodied, spiritual, creative, and artistic activities. Our senses are heightened. While we can't claim that we've all been transformed in the sense of having major core identity shifts, we've come to understand that there are certain conditions that set the stage for ongoing transformation to occur. One of our members (Tisdell, 2012) used the term transposing, like transposing music into a different key. We transpose the register of our being into something that we may have already known but haven't recently accessed. We resonate with the conference theme that implores "we must collaboratively re-imagine how individuals, institutions, and societies can learn new capacities and habits of being." The retreats have offered us opportunities for such re-imagination.

Theoretical Underpinnings

We take an eclectic approach to transformative learning as discussed by several in Taylor and Cranton's (2012) new handbook on transformative learning. While acknowledging the seminal contributions of Mezirow (1978), we recognize that transformative learning has affective dimensions (Andrews, 1995; Dirkx 2001) and is also collaborative and relational (Belenky & Stanton, 2000). Additionally, we embrace the broader planetary perspective described by O'Sullivan, Morrell, & O'Connor (2002) and the creative approaches discussed by Fisher-Yoshida, Geller, and Shapiro (2009).

Apte (2009) pointed out "much adult learning is additive" (p. 170). In the context of everyday life and learning, we often integrate new skills, information, and understandings into our current frames of reference. When previous ways of knowing are challenged or do not offer solutions to the situation or "disorienting dilemma" at-hand, an opportunity for perspective transformative arises. Mezirow (2000) defined perspective transformation as "the process by which we transform our taken-for-grated frames of reference" (p. 6). Transformative learning occurs when changes in the frames of reference that we use to make meaning in our world result in a choice to act differently (Mezirow, 2000).

What, exactly, is transformed during transformative learning? Fleming (2012) argued that attachment styles and internal working models are transformed while Kegan (2000) contended that there are various types of transformational experiences and different "forms that transform." While some transformative learning experiences alter our core sense of being and self as Fleming suggested, others simply transmute our state of consciousness, or our moods and feelings in the present moment. Tisdell (2012) offered that that in the latter case, "we are *transposed*—as music is changed into a different key—to a *variation* on the theme of our core identity, and we live larger because of these types of experiences" (p. 22, emphasis in the original). Such transformations and transpositions may occur through a process of dialogue and critical reflection (Mezirow, 1978) or though "extrarational body, spirit, and emotion/feeling" (Fisher-Yoshida et al., 2009; Tisdell & Tolliver, 2003), and creative and artistic expression (Lawrence, 2012).

Interconnected Themes

As we reflect on the meaning of the retreat experience, several interconnected themes emerge as conditions, which support the potential for transformative learning, and form the basis of this paper. Those conditions included intention, environment, time, a community of women, collaborative leadership, a sense of play, and synergy.

Intention

The original intention of the retreat in 1996 was to find a space where women professors could talk about issues specifically related to being women in a field that was then still dominated by men, in order to return to their spaces with a renewed sense of energy. The intention both then and now was to connect with women colleagues not only as professors, but also as people in multi-dimensions. There has been a certain mentoring function of the retreats as well. People are at different stages of their career; so those more seasoned mentor those earlier in their career, but those later in the career feed off of the energy and vigor of those who are often younger or less experienced in the professorate.

But academic inter-relating is only part of the experience of these retreats. Bersch and Lund (2002) described this environment as a "positive disorienting dilemma that pushes people out of their comfort zones" and "creates an atmosphere where there is a willingness to take risks" (p. 79). We've nurtured people through marriages and divorces or relationship break-ups, death of loved ones, and celebrated the birth of children or grandchildren. Some of us have become more interested in spirituality over the years, and the more recent retreats have taken on, what could be broadly considered an intentional spiritual component; including a simple opening and closing ritual to create and mark a space centering on honoring the whole person. Further, at times we draw on music, art, or symbol to create further meaning of our experience. At the same time, there is much sharing over food and laughter of every thing from theory to relationship issues to physical health. Creating such a space that can nurture the multiple dimensions of people is clearly intentional, and there is clearly power in that intention (O'Donohue, 2008) itself.

Environment

It is impossible to separate this notion of intention from the environment in which the retreat is situated. The most recent retreats have taken place in at Yukon Island in Alaska, at the retreat center of Gretchen Bersch, with the help of Carole Lund. Yukon Island is a mystical place, full of natural wonders, often shrouded in morning mist. Sometimes in the boat on the way over it feels that we are "crossing to Avalon" with Gretchen as boatmaster the "Lady of the Lake," given the power of her knowledge, and her incredible hospitality. Outside the majestic window of her retreat house, we can watch sea otters playing, and at least a few of us have spied a whale breaching out of the sea from this very spot. The environment obviously lends itself to a sense of natural discovery, but given that it is situated in the natural world with limited conveniences (such as indoor plumbing) it requires cooperation and the tending of chores. Andrews (1995) pointed out "as individuals and as a society, we must dig deep enough to once again touch the rich earth beneath—deep enough to find the manifestations of nature within our own souls. To do that, it is imperative to find our way into natural settings, into the wilderness" (p. 95).

Elsewhere, Gretchen and Carole have written about adult learning communities in remote environments such as the one that we were in (Bersch & Lund, 2002). They highlight the significance of the natural world, the fact that living together without some of the typical comforts of 21st century living, reminds us that we can easily live with less, and in doing so, we actually discover the more in ourselves and each other; hence we learn anew the meaning of the phrase "less is more."   That in itself is a "disorienting dilemma" that can holds the seeds of transformation.

Time

At the last retreat we could not cross the bay the first night to get to the island, as the water was too rough. Carole offered her cabin close to the bay and even though it was close quarters we all found the space for sleeping on the floor, meals, and conversations. No one even thought about the time we were missing on the island as we were together and that was all that mattered. Once on the island the distractions of everyday life became silent, with computers put aside, phone distractions at bare minimum, and the seemingly endless pile of work on our desks far away. We had the opportunity to slow down the hectic pace of everyday life, time to contemplate, meditate, take long walks, and engage in spontaneous conversations. Time became an almost non-existence commodity as there was no pressure as we moved from activity to activity, one flowing into another. We could choose whether we wanted to take part in the activities that were planned, drift off into individual and/or group conversations, or take a nap. Even the activities we engaged in were loosely structured, such as spontaneous walks out to Elephant Rock with its fascinating formations, looking at beautiful starfish on the beach at low tide, picture taking, and informal conversations. Having no pressure to be part of everything is a luxury we do not often have in the busy lives that we lead. Time became a gift that each of us could spend in different ways, some altogether, while in our own space, or in in-depth conversations with others about both our work and personal lives.

A Community of Women

The importance of women's multiple identities has been a topic considered extensively in the transformative learning literature. (See for example Hayes and Flannery, 2000). Being in woman space nurtured an atmosphere of trust, sharing, risk taking and healing as we gathered together on the island. We celebrated one another's accomplishments and listened to one another's personal and professional struggles with a supportive intention, and shared our hopes and dreams. No thought was given to the time we spent in these conversations with one another, as some needed more time to work through a major issue that plagued them, while others just chatted informally in spontaneous conversations. Shared meals, sleeping quarters, long car rides to our destinations and time for our small and large group meetings, and conversations among friends and new acquaintances nurtured our getting to know one another at personal as well as professional levels. This community has continued after the retreat was over as we continue to share these conversations via email and the internet with one another from major problems solved to one participant's spiritual journey.

Women space provided opportunities to assist each other in activities that for some of us were not comfortable, while others jumped right in. For example a time for art projects was one of our planned activities. A few of us went right at it as this was a medium that was familiar, while others held back and waited for others to take the lead, which they were happy to do. People also shared their talents such as offering massages, food preparation, music making, and poetry that captured the spirit of the group.

Collaborative Leadership

While there was a host for each retreat, facilitating various activities was shared among the group members in natural and organic ways.   The casual atmosphere made for a breakdown of roles. We were of various ages and different stages in our careers ranging from early career to retirement. We all shared and learned from one another. This occurred naturally. "Being in a remote retreat setting facilitates the building of a community" and enables participants to "relinquish control, fosters dependence on one another, and allows all participants to function as both learners and facilitators" (Bersch & Lund, 2002, p. 78).

Nonetheless, as educators who are intensely focused on how adults learn—the actual process of shifts, disintegration and reintegration of knowledge and meaning—we permitted *ourselves* to explore. Again, our environment was trust. There were no powerpoints and no real "evaluations" to impede a free-flowing atmosphere of experimentation. Without over-generalizing women's ability to develop through collaboration, there was certainly a unique goal of acceptance within the larger group, and an intense focus on supporting one another's strengths. This support was embedded in the atmosphere, and modeled through ritual and collaborative activities.

A Sense of Play

The retreats have consistently been filled with laughter, lightness and playfulness. We allowed ourselves to engage our childlike sensibilities without judgment. We learned through experience, modeling, creative awareness, experimentation and simply playing**.**   Playfulness is a process embedded in trust and hope. When one *plays* one abandons dogma and involves herself in the possible, the gleeful free-fall of repositioning, transforming, and reinventing. Play naturally has an element of freedom—the sauna, piles of shampoos, singing with Libby, cleaning fish with Gretchen; massages with Carrie; free-form art displays that make gypsies out of haggard academics; the wonder of Alaskan flora. Yet, there is safety, a boundary of mutual respect, and an environment that acknowledges idiosyncrasy. Dramatic opportunities for transformative learning reside in imaginative engagement with the everydayness of our lives in what Thomas Moore (1996 p. 16) refers to as the "re-enchantment of everyday life" .

Synergy

Synergy is commonly defined as the whole being greater than the sum of its parts. While some of us individually experienced transformation, what seems even more significant is the transformation of us as a group. The retreat experiences helped us to move from a group of colleagues who happened to share a gender to an interconnected group of "sisters" with a shared history of profound experience. The learning we experienced extended beyond the time in retreat. At an academic level, various research and writing projects were birthed. The connections that seem most synergistic however are the intangible ones. Being able to spend dedicated time in a beautiful, peaceful setting and participating in both serious and playful activity with a nurturing and supportive group of women all contributed to the synergy. A connection between women professors past, present and future was forged. Carrie expressed it as a transmission of culture. "I now have a sense of how to honor those who have come before me and to pass on this legacy to others who come after me in the field." We also created a tradition that allows us to share this soul-feeding experience with others. The collaborative quilt described above has been passed around to women who are struggling with illness, sadness or grief to bring them healing energy.

Conclusion

Adulthood is dynamic. It is generative. It is unique to each of us. There are new "ahas" that promote knowledge even as we support others. Imagine all adult educators—those very committed folk who spend their time promoting the strengths of their students--sitting down together to enhance each other's worlds. Each of us must tap into our own strengths, acknowledge our connections, coach and cultivate our talents, find time for transition, transformation, and nourishment at that great table.

Sustained time in residential settings with a supportive and trusting group of friends and colleagues has the power to transform at multiple levels. In our presentation, we invite audience members to eavesdrop as we critically and creatively reflect on our retreat experiences. We will then facilitate an open conversation on the potential for transformation of intense residential experiences.

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Emerging Model: Cultivating Transformative Learning Environments
with and *through* Technology

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Abstract

With the advance of technology observable numbers of academic courses are delivered online, which has raised concerns on the deeper learning experiences associated interaction and reflection. Given that the recent studies suggesting that new technology produce collaborative and reflective learning, we explore possibilities of incorporating technologies to foster conditions for transformative learning and transformational action. In this paper, the author attempt to create robust and interactive space for online learning through a multifaceted instructional design.

Introduction

As the learning demands placed on adult in the early 21st century intensify, technology has become a way to mitigate some of these demands as well as challenge the way learning is delivered and developed for adults. As technology has continued to advance the way learning is delivered and reach potential learners, observable numbers of academic courses are delivered online from the more than 65% of institutions in the States (NCES, 2006), which has raised concerns that there is little opportunity for "the deeper learning experiences associated with interaction, dialogue and reflection" (Boyer, Mahler & Kirkman, p. 336). However, recent studies show that new technology can produce collaborative and reflective learning (Boyer, 2003, Boyer et al., 2006; Parker, 2003), suggesting that there is a way to integrate deep learning with the instrumental demands of convenient delivery. However, empirical research on approaches to foster transformative learning in online contexts still remains illusive (Smith, 2012).

In this paper we present preliminary findings of a pilot study that sought to develop a robust online learning space that fostered conditions for transformative learning and transformational action. We draw a distinction between learning and action in order raise awareness that these a distinct yet interconnected capacities. What we mean by transformative learning is the type of learning that fosters conditions through a reflexive capability to revise underlying assumptions and reframe ways of understanding reality (Mezirow, 1997, 2000). What we mean by transformational action are the capabilities that help grow adults capacity to further develop their ways of making meaning or ways of knowing that inform the way they act in the world (Drago-Severson, 2009; Kegan, 1994). We believe that both types of transformative intentions need to be met to generate the types of learning that move beyond the informational, instrumental learning that guide conventional self-directed pedagogy in asynchronous online learning environments. What follows are the research questions that guided this study; a discussion of the epistemological undergirding's of the course design and emerging findings.

Research question 1:
- What varieties of technology are best suited for engaging transformative learning?

Research question 2:
- What, if any, signals communicate the presence of transformative learning conditions in the online context?

Research question 3:
- How can the potential for transformative learning be further enhanced and encouraged through technology?

Transformative Learning and Online Engagement

Transformative learning brings together two distinct and yet interconnected conceptual frameworks: educational theories of adult learning (Brookfield, 1986; Knowles, 1975) and the psychological theory of constructive-developmentalism (Kegan, 1994, 2000). According to Mezirow, "transformative learning refers to the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits or mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action" (2000, p. 7-8). This is precisely the kind of learning needed in the process of leading adults to grow in their cognitive capacities and developmental

of more complex ways of knowing to meet the complex and persistent demands of early 21st century life. Online learning that does not create the conditions for adults to develop such capacities to meet those demands is insufficient and therefore not transformative.

Our study was guided by the notion that Transformative learning is "a process by which individuals engage in critical self-reflection that results in a deep shift in perspective toward a more open, permeable, and better justified way of seeing themselves and the world around them" (Cranton & Wright, 2008, p. 33). In the process of transformation, Mezirow highlighted that ongoing *critical reflection on the assumptions* (Mezirow, 1997) leads to sustained transformation. Mezirow noted that transformation occurs through rational critical self-reflection and communicative discourse- engagement in conversation with others (Cranton, 2006; Mezirow, 1997; 2000) and lead to reflectively and critically taking action on the transformed frame of reference (Mezirow, 2000). In particular, Mezirow emphasized that "to take the perspective of other involves an *intrapersonal process*, … (and) also involves an *interpersonal dimension*, using feedback to adapt messages to the other's perspective" (Mezirow, 2003, pp.59-60, italic added). It is this thread of the theory that we wish to expand upon in the context of our course design through specific learning engagements that we believe did begin to foster conditions for transformative learning online.

Practical Approaches to create the conditions for Transformative Learning
In order to create the conditions for Transformative learning we relied on Torbert's (2003) principles of collaborative developmental action inquiry defined as "…a method to explore a kind of behavior that is simultaneously inquiring and productive. It is behavior that simultaneously learns about the developing situation, accomplishes whatever task appears to have priority, and invites a redefining of the task if necessary" (p.1). In other words, it combines conscientious reflexivity in the midst of action, along with the potential for adaptation in the moment. The specific types of learning strategies that help to both engage adults in this process of reflexive inquiry in the midst of action are discussed as single-loop learning with a focus on behavioral adjustments, double-loop learning with a focus on the exploration and potential re-vision of underlying assumptions for meaning making, and triple-loop learning or "super-vision" vigilant about how ones intentions, actions and impacts are aligned (Torbert, 2003, 2004; McCallum, 2008; Nicolaides, 2008; Nicolaides & McCallum, 2011).

Torbert's collaborative developmental action inquiry (CDAI) (2003, 2004) builds a theory of single-, double-, and triple-loop learning, taking into account the difficulty of transforming our ways of knowing, or what he calls developmental "action logics" (2004, p. 18). Developmental Action Inquiry identifies three main units of experience: the 1st person (subjective); the 2nd person interpersonal (inter-subjective); and the 3rd person (objective & systemic). As Figure1 shows, single-loop learning identifies how gaps between action and outcome might be closed through changes in the intensity, rate, or manner of behavior used to achieve a goal. Double-loop learning inquires into the assumptions that guide the development of strategies/design plans, which requires greater awareness and a more challenging degree of learning to surface, understand, and revise those assumptions. Finally, triple-loop learning explores whether or not our intentions and purposes themselves are appropriate, requiring an advanced level of awareness and availability for adaptation.

Figure 1. Action Inquiry Model of Learning and Adaptation
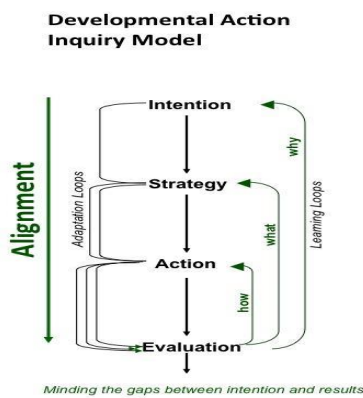
Source: Nicolaides & McCallum, 2011 Adapted from Torbert, 2003

Each of the inquiry loops of learning and adaptation can occur in the three main units of analysis (Chandler & Torbert, 2003), namely the 1st person (personal experience), 2nd person (interpersonal experience), and 3rd person (objective, systemic, impact/outcome). These units of analysis also became principles of engagement guiding the learning choices for this online community. By intentionally engaging these levels of analysis, an individual could use CDAI to evaluate the gaps between his or her intentions and the outcomes of his/her actions, identifying whether or not the gap was caused by issues at the level of behavior/performance (single loop), at the level of strategies/design plans (double loop), or at the level of intention/purpose (triple loop). The qualities of each of the learning loops informed the choices we made to design and develop an online transformative learning environment. We translated each unit of analysis into three main principles that guided out online engagement with and among students.

Principle I: Holding environment (3rd person objective space of impact and outcome)

Principle I: Holding environment (3rd person objective space of impact and outcome)

Kegan (1982, 1994) states that the *holding environment* is one way to foster developmental transformation. Developmental transformation refers to the purposeful engagement with deep reflexive learning that makes space for growth in the expansions of ones meaning making and way of knowing (Drago-Severson, 2009; Kegan, 1994) in a timely manner. The holding environment is the context in which, and out of which, the person grows and support as well as challenge adult's ways of knowing (Drago-Severson, 2009; Kegan, 2000) and meets a person's needs without frustration, and at the same time it challenge learners to grow when a person is ready (Kegan, 1982; 1994). Taylor and Elias (2012) also noted that holding environment provides the safety, security and encouragement that make the "often-painful transformation" possible (p. 150).

Principle II: Authentic relationship (2nd person interpersonal, mutual experience)

Establishing "authentic" relationships between educator and learners is considered a critical element that fosters transformative learning. We build from Cranton (2001) notion of authenticity, which she describes as the expression of our genuine self in a community and with others in relationship. Martin Buber (1961) believed that it is only through relationships with others that authenticity can be fostered. Authenticity when present is felt in the relationship between educator and student. Southern (2007) mentions that in the context of transformative learning, "the nature of the relationship can establish a context of openness and trust that both challenges students and supports them in being vulnerable to explore in ways that create the possibility for transformative learning" (pp. 329-330).

Principle III: Presence of Educator (1st Person personal integrity and experience)

In facilitating transformative learning, educators take up the role of helping learners become aware and critical of their own and others assumptions (Mezirow, 1997). The role of the educator is to provide learning experiences with the explicit intention to foster transformative learning for all learners creating ideal conditions for discourse and engagement. According to Mezirow, "learners need practice in recognizing frames of reference and using their imaginations to redefine problems from a different perspective" (p. 10). To accomplish this educators select instructional materials that mirror the real-life experiences of the learners (Mezirow, 1997). Holding these dynamic principles as foundational we determined the design element and technological sources to help us create potential for transformative learning.

Research Design and Data Analysis

Our Context: Instructional Environment/ Course Model

This pilot study is based in the context of a graduate level course at a research one University, to foster a deep understanding of transformative learning theory. This four-week-course was planned as blended course, which integrated three traditional face-to-face meetings paired with innovative online strategies to create a more robust and engaging open sourced learning environment. Twelve students were recruited with a strong interest in both transformative learning and a willingness to learn in a blended experimental online platform.

Edmodo as a basic architecture for online learning platform was chosen for three reasons: 1) similarity to Facebook, 2) its free service and Mobile capability, and 3) convenience to incorporate other technologies such as video. Using Edmodo as the shell for our virtual presence we built our own online learning space incorporating a variety of technologies. Each design component for the online learning as well as the face-to-face class activities

were selected according to the principles of Torbert's Developmental Action Inquiry Model discussed earlier including the 1st person learning, 2nd person interacting and 3rd person impact.

Torbert (2003) suggests that adults can develop their capacity for double- and triple-loop learning by engaging in practices that simultaneously promote their growth in cognitive capacity and their levels of learning, reflecting, and adapting in action. In this vein, the context of class was created to promote transformative learning, each design component and class activity were planned to stimulate learners and educators to reflect as they learned new ideas about themselves and their world. The basic structure of the course included the following and Table 1 illustrates how the class was planned.

Table 1: **List of class activities for each level of learning**

Level of Learning		Artifacts
1st Person Learning	Virtual introduction & content talks	20 minute TedTalk format and filmed at a professional studio provided by the University
	Reading Materials	3rd person artifacts for the 1st person reflection
	A personal "home made" introduction video	
2nd Person Interacting and Learning	four-hour face to face intensive action learning sessions	Case based learning, story telling and exploring meaning making.
	Daily inquiry interaction	Private chat spaces; topic threads for online discussions; Skype for communications among students and with faculty.
	Ongoing reflection and feedback by survey	
3rd Person Impact and Learning	Open Sources	TedTalks, media such as short and inspirational video and movie clips
	Personal TedTalks	

Figure 2. Multifaceted online learning model
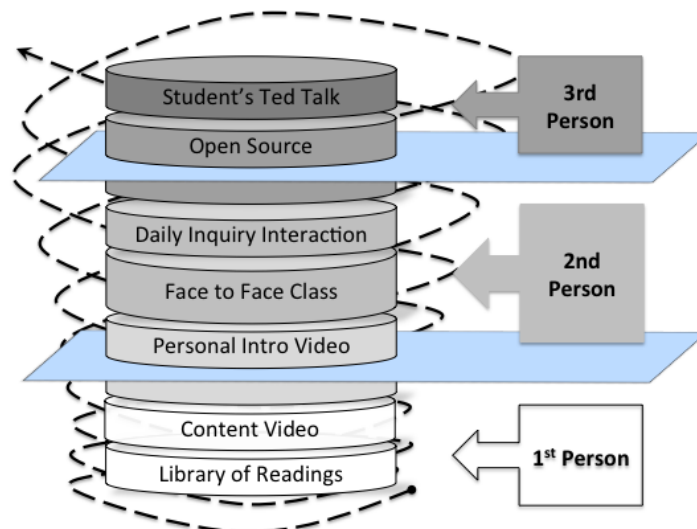
In this figure 2, there are three simultaneous interactions being captured. The multifaceted technologies were selected purposefully to foster reflective and reflexive moments at each levels, as well as interactions in the 2nd person and 3rd person levels.

The data for this study included the participation of twelve graduate students who completed the course evaluations throughout the course through daily inquiry feedback and upon completion of the course students' completed an extensive evaluation of the course in our Edmodo platform.

Findings and Analysis

Researchers analyzed the data that including the course evaluation; daily inquiry interaction captured in Edmodo, as well as personal communications from students and critical inquiry conversations during the face-to-face interactions. In our reporting here we used pseudonyms for all participants. What follows is a discussion of two significant findings from this study: creating conditions for potential transformative learning online and signals for potential transformative learning online. We begin with the first finding, creating conditions for transformative learning online with data to illustrate. Four distinct conditions emerged as features of a transformative online learning environment.

Creating conditions for potential transformative learning online

I.   Robust learning environments

Conditions that cultivate a robust and safe learning environments are critical in fostering transformative learning (Cranton, 2006; Mezirow, 2000; Taylor, 2000). Edmodo has the flexibility, accessibility and agility for cultivating such a safe learning environment. Students described the online platform was successful in creating a holding environment. Its privacy was one factor that helped to create and communicate safety in addition to the way that the space encouraged honesty and trust among peers with timely communication facilitated by the mobile feature of the Edmoto platform. This spaciousness felt robust in that there was the opportunity and encouragement for perspective transformation. Here is what they said:

> - I discovered that my hopes and fears were shared by others. That I am not alone in my experience and therefore took courage to share more and be open to others
> - We dug deep, trusted each other, and became vulnerable to examining our own disorienting dilemmas, and what we might do to work to transform our fears, and thus our lives

The faculty held the ultimate responsibility for establishing the boundaries for a safe and robust online space for deep learning. In particular, the instructor's willingness to be vulnerable and open with the class contributed to creating a more safe and robust environments for transformative learning online.

> - Instructor is both enlightened and enlightening, and very adept at explaining and expanding upon transformative theory and practice. … More deeply, how she opened herself to us for the benefit of our own learning.

Edmodo, is a user-friendly online learning platform that contributed to keeping students connected as a learning community even outside the classroom. Students found Edmodo easy to access and flexible to deliver course materials. In particular, the availability of access to the class through the mobile application using the mobile devices such as tablet, pc, or smartphone was another advantage of Edmodo that enhanced the accessibility.

> - Must say, I really enjoyed using Edmodo! Very user-friendly and a great way to keep us connected outside of the classroom. … I think students like it for its ease and resemblance to Facebook.
> - Flexibility of instructor when working out the "kinks" with the online delivery of videos and other info through Edmodo was very, very helpful to students.

Authenticity describes the presence of a genuine self in a community and with others in relationship (Cranton, 2001). Only when meaningful and genuine relationships among students are established, transformative learning in the classroom might take place. As discussed earlier, authentic relationships establish "a context of openness and trust" (Southern, 2009, p. 329) that creates possibility for transformative learning. Students reported that they felt the authentic spirit of collaborative learning and being part of a learning community.

- Student-to-student and teacher-to-student online interactions were lively and thoughtful. Virtual experience allowed for abundant time to reflect on classmates responses.
- I would describe this class as touching the hearts, the minds, and the souls of students.
- I really appreciated the authentic spirit of collaborative learning. … I have heard many times that I am in a "learning community" but this is the first time I felt I was part of a learning community.

III.   Dialogue: Interactions on the online platform

Among number of various online design elements, Reushle and Mitchell (2009) note that dialogue enabled learner-learner, learner-facilitator and learner-content interaction that are visible and accessible to all students, stimulate peer conversations and creates a collaborative learning atmosphere. This study illustrated that the visible, accessible and continuous dialogue within the Edmodo platform further extended opportunities for critical reflection at the individual level (1st person) as well as communicative discourse in the shape of engaged conversation with others (2nd person). Figure 3 shows a snapshot of a discussion forum in Edmodo and following that is a vignette illustrating the discourse engagement among peers in a group.

Figure 3. Snapshot of discussion forum at Edmodo
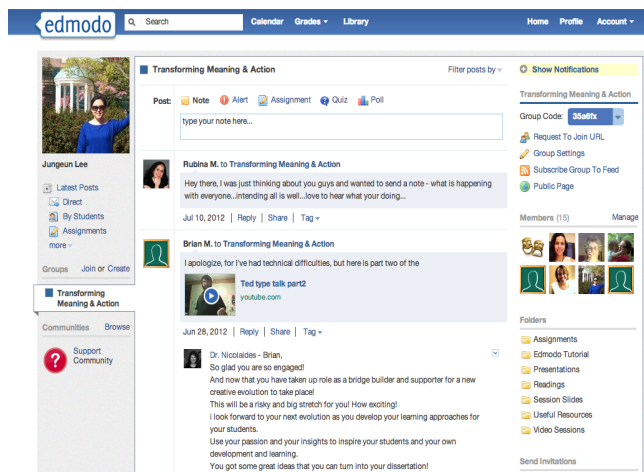
I.   Instructor's presence

To cultivate the inclusive conditions for discourse is one of the requirements for transformative learning. The educator creates a learning environment where access to full information, an environment free from coercion, opportunities to advance beliefs, where students feel free to challenge, defend, explain, assess evidence and judge arguments, while encouraging an empathic and open stance to other perspectives, making tentative best judgment that guide action (Mezirow, 1997). In the same manner, the educator also is engaged in reflection and dialogue with students in timely and visible manner (Boyer et al., 2006). The data showed that the faculty routinely attempted to ease the learning process with significant support, resources, and availability that was appreciated and modeled communicative interaction in the Edmodo.

> • I like how Faculty created an appreciative learning environment ... but more deeply, how she opened herself to us for the benefit of our own learning.

Mezirow (1997) and Cranton (1994) also address the impact of educators becoming a co-learner by transferring the educator's leadership to the group. When the instructor is willing to relinquish position of power, it actually opens the space for conditions for transformative learning.

> • A transformative course! I really appreciated the authentic spirit of collaborative learning. I did not feel a sense of hierarchy with professor or students.

In what follows we present the second findings discussed in a similar fashion, using data to illustrate the signals for transformative learning online. We present what we call signals according to the three levels of analysis discussed earlier. Signals that reflect 1st, 2nd, and 3rd person learning that show potential for transformational action.

Signals for Potential Transformative Learning

The second findings that emerged from this study we describe as "signals of potential transformative learning online". These signals took many shapes and we choose to present them using the levels of analysis discussed earlier as Torbert's (2003, 2004) heuristic for principles of collaborative developmental action inquiry (1st, 2nd, and 3rd person inquiry). The course was intentionally developed to foster transformative learning through encouraging individual and interpersonal engagements with the theory and new self-generated content created by the students to communicate their learning and continued inquiry. As the students and faculty engaged with the course design as well as the technology elements we noticed signals emerge that seemed to communicate the potential for transformative learning.

1st Person Engagement: Signals of Reflection and Reflexivity

Critical reflection is essential in transformative learning (Mezirow, 2000). However, critical reflection itself is not enough to lead to transformational action. To experience the change of meaning perspectives and frames of reference, learners need to be engaged in the process of continuous reflection and reflexive inquiry. Reflexive inquiry enables learners to pay attention to increasing consciousness and level of engagements while reflecting on and in action (Alvesson & Sköldberg, 2000).

The course learning engagements intentionally involved design elements that would foster reflection. The students reported that the design elements, course materials, course content and assignments led to self-initiated deep and multiple levels of reflection. Here is what students said:

> • The readings allowed us to immerse ourselves in the subject matter and were those from the key theorists in the field. The assignments encouraged us to reflect upon and apply transformative learning theory to our own meaning-making.

In addition, the 24/7 virtual platform provided opportunities to enhance and enrich the individual's self-reflection. In particular, the content podcast videos were reported to help students understand the theory deeply and reflect on it more fully at a 1st person level.

> • Instructor's lectures in video were the most useful component of the online experience for me. I could stop her mid-thought to take notes, rewind, pause to consider what she was saying, pause the slides so I could read all the info on them, etc. I really, really like being able to rewind instructor's lectures so I could let them sink in, capture and consider her ideas more fully.
> • Honestly, the ability to learn and study at my own pace was the most valuable component of this course. I was able to download the lesson, watch it, replay it, and watch it again. The repetition enabled me a different type of learning experience.

As such, online learning that encourages curiosity and self-direction in learning facilitates personalization of the curriculum and deeper levels of thinking (Boyer et al., 2006). Through the virtual learning platform, learners could delve more deeply into their individual learning topics. The library of content videos gave students continuous opportunities to reflect at their own pace, which enabled develop their reflexive capacity. Deep reflection on the theory provided not only insights about the theory itself but also how to see how change possible in one self.

> - What I take away primarily is the introduction to the theory - now I can begin to delve into it to really learn it. I have a road map, which I didn't have a month ago - which is truly a treasure map for me!
> - Gaining insight into the "nuts and bolts" of how experiences affect change in self. At the core of my two degrees, and my current studies, is improving quality of life through "leisure." I feel like I have finally found the "missing piece," or theory, that explains how and why!

Critical reflection is a rational as well as an affective ways of knowing "that prioritize experience and identify for the learner what is personally most significant in the process of reflection" (Mezirow, 2009, p. 4). Reflection, thinking about the conditions for what one is doing, and how one is taking action are signals that some sense of change may be bubbling for the individual. As reflected in the data displays there are several comments about the levels and intensity of personal reflection that lead to new actions expressed in the face-to-face meeting as well as online interactions.

2nd person engagements: Signals of interpersonal and mutual learning

Distinct and interdependent relationships among students and the educator are significant in developing an authentic practice for transformative learning (Cranton & Wright, 2008; Mezirow, 2009). Interpersonal learning (2nd person) processes enables learners to explore together through conscious dialogue underlying assumptions of their meaning making. These learning engagements designed to help guide critical reflection lead to initial revisions of taken for granted perspectives and unexamined assumptions. Using learning processes such a story telling, action in our and case based learning, all 2nd person and mutual reflexive processes encouraged perspective reframing. As the course continued to develop both the sense of learning communities and a safe holding environment, students were able to share their thoughts and emotions in the midst of learning and interaction's in ways that fostered reframing actions.

> - Student-to-student and teacher-to-student online interactions were lively and thoughtful. Virtual experience allowed for abundant time to reflect on classmates responses, as well as my own.
> - Putting Torbert's concept of mutual engagement to the test during our last f2f meeting generated deeper insight into how the mind works regarding cognition and emotion. That it was a wonderful course … it encouraged deep and honesty exploration of the theory of transformative learning in such a way as to actively engage with the theory so as to realize how it plays a significant role in our own experience as scholars and practitioners and how we can create learning spaces for others to engage their learning and discovery as well.

Students reported surprise in how the different 2nd mutual learning engagements allowed them the space to notice their own assumptions in action assumptions. Though re-vision of these now seen assumptions were now available for transformation, we do not have the data that this indeed is what transpired. Some students' did report through reflective feedback, the potential for reframing assumptions and transformational action based on new views.

> - I would describe it as an accelerated course in transformative learning theory that will actually change and/or shift some of your own preconceived ideologies. … It's an imperative theory to implement within the numerous settings of adult education.

3ʳᵈ Person Engagement: Signals of impacts for self, with each other, and beyond the course

The third signal that we discuss an alignments of impacts that were observable in the students capacity for taking up new perspectives, communicating with greater openness and willingness to be changed and new actions that students reported they were excited about taking as the course came to a close. According to Torbert (2003, 2004), the notion of a transforming vision or triple loop awareness focuses on how one's reflexive inquiry, transformative learning, and transformational action are aligned.

- It (the course) encouraged deep and honesty exploration of the theory of transformative learning in such a way as to actively engage with the theory so as to realize how it plays a significant role in our own experience as scholars and practitioners and how we can create learning spaces for others to engage their learning and discovery as well.
- Depth and breadth in a very short time on transformative learning. We actually got to see elements of the theory in action. My take away was how amazing it is to create a robust learning container and how I would like to do that.
- The learning experiences focusing on the theory itself as well as theory-in-practice brought a greater degree of consciousness towards alignment between transformative learning and transformational action in the way that I am now able to see my ways of knowing in action and the impact they have...or at least a have a sense of this now that was not even present in my consciousness previously.

As our students reported above, there were alignments between the learning context of the course, the learning engagements and the potential for transformational action in the specific contexts that each student was embedded in beyond the University. The students describe how they cultivated a refined awareness of the way they make meaning, take action, and the impacts they have in the contexts they live and work in. What we have described as signals towards more inclusive perspectives, capacity to revise assumptions and move towards a fullness of their personhood, were transformative (Heron, 1996).

Challenges

We have presented some of the exciting insights that began to emerge in the context of this innovative course. While there was much to be excited about they were many challenges to overcome and many that never were resolved. Four significant barriers emerged and are discussed in what follows.

Emotional resilience and timeless

Without emotional resilience and a sense of ripeness for change, it is rare that one will experience transformation or even enjoy this type of transformative learning (Boyer et al., 2006). Educators for transformative learning will meet resistance from the students and at times the faculty themselves who discover barriers to sharing their thoughts, feelings, and becoming vulnerable also creates such a barrier. "Some individuals may never move beyond the intense emotions of the disorienting dilemma despite critical reflection and discourse and extensive instructor support" (Boyer et al., 2006, p. 356). For example, for some students, three face-to-face meeting in an intensive and non-traditional format was insufficient for creating trust and a safe environment.

> - The one-on-one story telling/retelling exercise worked really well for me. In hind-sight, I think maybe the 4-column exercise would have been more impactful for each of us if we had shared it in pairs or triads also. I was not comfortable with the depth of sharing in the full group - it seemed a little forced to me. I think it would have also been a more robust holding environment for that exercise if we had more time f2f together before wading into those deep waters together. … Meeting only 3 times f2f didn't give enough time, in my experience of it, to provide enough trust within the group to go to that depth. I think the f2f learning would definitely be improved by more meetings and more sharing before plunging that deep.
> - If the idea is for students to share at a depth that initiates a transformational shift, they need to know each other and build trust a little more before going deep into essential beliefs (big assumptions) - which is powerful sharing that would be better served in more trusting relationships - I think.

As a student mentioned, the short course time frame further accentuated the risk in engaging with this type of learning. Research suggests that the initial orientation session for the course at the beginning "is the primary catalyst for many of the students to experience stress and discomfort" (Boyer et al., 2006, p. 353). Barriers abound regardless of how a course is initiated online with clear boundaries and a strong signal for a learning culture.

Digital Gap

That adult learners are familiar with emerging technological trends and are capable of keeping up with the pace of rapid change is taken for granted in todays' convenient online delivery. We met the digital gap barrier as some of our elder adult learners formed resistance to the technology and a lack of trust in individual's initial engagement with a virtual learning platform. In addition to this suspicious attitude valid technological difficulties due to older equipment and Internet speed proved problematic. It was in the overcoming them though that more safety and trust was built in an organic and timely way.

> - The difficult part for me was downloading the videos, getting my own video recorded and uploaded, learning how to navigate the Edmodo sight - generally the basic use of the site.
> - A "user's guide," - perhaps a one-pager, regarding using Edmodo needs to be provided in advance of the class.

Though the necessary information regarding access to new a platform and use of technology were provided prior to the class, there were individual differences in accessing and using devices in the online environment. To ensure communicative learning online, instructors have to pay attention to the engagement side, participate side, and facilitator side of the interactions (Cranton, 2006). For example, instructors may wish to explicitly require that students have access to Internet with reasonable speed and a computer with enough specification to participate in the class activities. In addition, consideration of virtual platform specifications that are easy to navigate is an essential part of the preliminary study and selection of the online platforms.

Role of facilitator

Several comments made by participating students alluded to the importance of the role of educator as guide, facilitator, and risk taker. We found that the faculty for this course was challenged by the dual responsibilities of establishing both the boundaries of the virtual learning environment, as well as model the freedom to generate new designs within the online learning platform that came from the students. For example, one of the challenges we faced was how to establish in a short time a sense of community online.

As the researchers were designing these activities for community building, we had to also complete these assignments and by doing so setting the tone of the virtual space. How each researcher "showed up" as the educator and as a member of the community was critical for our continued development as a community. This illustrates that in addition to keeping the role of the educator in the foreground of transformative pedagogy, so to is the "way" in which the educator shows up always in the background and always on display. Your "digital self" is set in perpetuity in the virtual space of a video stream, unalterable and fixed. The levels of engagement needed for the educator to

both show up embodying the conditions for transformative as well as being captured live through the design elements of the virtual platform, was disorienting.

Individual's readiness an ripeness

Student self selected to participate in the course and study because they felt initially attracted to both transformative learning theory and a non-traditional online learning delivery system. Readiness for transformative learning was not a precondition for participation however readiness became a factor once the barriers to learning began to emerge. We discovered that preparedness, making meaning explicit, the conditions for learning that this platform was aiming for, the access to technology needed, the time needed for engagement and the self directed dimensions of their learning did not translate into readiness. Readiness, both internal capacity to meet the challenges of transformative learning and the willingness for the learning-on-the go technology selected to animate the design elements were taken for granted. Recognizing that ripeness- individual readiness to grow, develop and learn- and readiness, individual's willingness to learn-on-the-go- emerged as demands for our virtual learning engagement. The demands became palpable as we all felt stretched and created a risky disorientation despite the trust and safety we carefully attended to.

Conclusion

In this preliminary study, the researchers attempted to explore possibilities of incorporating varieties of technologies to foster the conditions for transformative learning toward transformational action. We attempted to create user-friendly, content-rich as well as an interactive space for online learning, through a multifaceted instructional design. Design elements incorporated the virtual platform Edmodo; mobile technology for increasing accessibility; professionally produced podcasts were developed; personal produced videos were incorporated; and open sources were used. These multifaceted instructional designs, using varieties of technology, contribute to expand the notion of conventional online learning. This initial multifaceted online learning model illustrates the possibilities that exist to develop participatory, interactive, content-rich as well as context relevant online learning environments that foster the potential for transformative learning and transformational action. Our intention was to challenge our own taken for granted assumptions about the limitations of online learning. What we found was that we were ripe for learning, ready to stretch our existing taken for granted assumptions about the types of learning possible online. With care, grounded and persistent intention, access to technological resources, support from our University to take risks in creating an innovative virtual learning platform we created a space for personal and mutual transformation.

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Expanding Voice and Vision: Transformative Learning and Teaching Social Justice

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Abstract

This paper will link teaching social justice with different strands of transformative learning theory that include: individual perspective transformation, planetary-global transformative education, non-western ways of knowing, and emancipatory teaching. These themes are connected to the UNESCO Associated School Project (ASPnet) four priority areas: inclusive education, education for sustainable development, human rights education, and education in support of intercultural dialogue. This presentation will draw from a completed qualitative study that explores the way twenty Canadian teachers are integrating social justice themes in their curriculum. The teaching and learning strategies/approaches they apply are examined from the lens of transformative learning theory. Implications for educational innovation will be presented.

Introduction and Theoretical Background:
The Different Strands of Transformative Learning Theory

Theories of transformative learning have been applied extensively in different educational contexts such as literacy development, counseling, health education, planetary sustainability, cultural adaptation and intercultural awareness, and professional development. (Cranton, 2006; Merriam and Grace, 2011; Mezirow and Associates, 2000 O'Sullivan, 2002). In recent years, studies applying transformative learning to individuals living in an urban setting have advanced our understanding of the contextual nature of learning and the way learning is influenced by factors such as population density, cultural diversity, the presence of financial resources, and access to quality education (Martin, 2006; Magro and Ghorayshi, 2011). Drawing on their work with adult literacy learners in Milwaukee,Wisconsin, Leong-Kappel and Daley write that for many urban learners, anonymity is the consequence of political, social, and economic barriers that prevent the development of sustained relationships and restrict access to urban power structures and resources" (p.86). A key difference among the applications of transformative learning theory is the emphasis placed on psychological and individual change in comparison to transformative social activism, political change, and critical global awareness. Edward Taylor (2008) writes that the multiple theoretical conceptions of transformative learning theory have "the potential to offer a more diverse interpretation of transformative learning and have significant implications for practice." (p.7). Culture, ethnicity and race, the role of spirituality, planetary sustainability, positionality, and emancipatory teaching, and non-Western ways of knowing represent themes that have emerged as transformative learning theory has evolved over the past third decades since Jack Mezirow's (1981) initial description of perspective transformation as a theory in process. The common themes in transformative learning involve: critical reflection, creativity, self-knowledge, a reverence for life, democratic discourse, and the balance of attaining collective and personal goals. A fundamental shift takes places in the way they see themselves and the world (Mezirow and Associates, 2000; Merriam and Grace, 2011). Taylor (2008) points out that despite the advances of transformative learning theory, more research is needed into the way it is applied and translated in the classroom.

Mezirow's (1981; 2000) theory of transformative learning describes how individuals interpret, construct, validate, and reappraise their experiences. Life crises such as the death of someone close, divorce, a move, trauma, conflict, or war, and the rebuilding one's life in an unfamiliar culture can create conflict, self-examination, reflection, and a change or revision in perspective. Mezirow (1990) writes that transformative learning can be viewed as "an enhanced level of awareness of the context of one's beliefs and feelings, a critique of one's assumptions and particular premises, and an assessment of alternative perspectives" (p.61). For Brookfield (2000) "an act of learning can be called transformative only if it involves a fundamental questioning and reordering of how one thinks or acts" (p.139) The teacher can play a crucial role in fostering transformative learning.

A Planetary-Global Perspective of Transformative Learning

Theorists like Edmund O'Sullivan (2002) and Bud Hall(2006) present a more global and planetary perspective of transformative learning   Systemic and structural barriers that reinforce poverty, racism, sexism, war, work degradation, human rights violations, and ecological devastation need to be examined from a critically reflective stance. A sense of alienation and dispossession, note O'Sullivan, are the fallout of globalization. Alternative lifestyles and ways of thinking are needed to counteract the negative impact of planetary devastation and rampant globalization. "Transformative learning involves a deep, structural shift in the basic premises of thought, feeling, and actions….such a shift involves our understanding of ourselves and our self-locations; our relationships with other humans and the natural world; our understanding of power in interlocking structures of class, race, and gender; our body-awareness; our visions of alternative approaches to living; and our sense of the possibilities for social justice and peace, and personal job" (O'Sullivan, 2002, p. 11).

Bud Hall (2002) notes that on global terms, over 100 million people are refugees, forced to flee their homeland and living against their choice in countries in which they were not born (UNHCR, 1995). Many people are losing a vital connection to each other, the natural world, and themselves and education can play a role in helping people reconceptualize the way they view the world. In his paper" The Right to a New Utopia" Hall (2002) captures the tension of our world today:

In fact, the kinds of lifestyles and consumer patterns that fuel the global market utopia are a cancer for the planet. In the insightful work entitled *Our Ecological Footprint*, William Rees outlines a method for determining the percentage of the world's resources that we use as individuals, as communities, or as whole nations. His complex formula points out that if the entire world were to achieve the same levels of growth and development that characterize most lives in rich countries, we would need four entire planet's worth of energy resources to satisfy these demands. Clearly we are on an ecological collision path between a Utopia of the rich and the carrying capacity of a still-fragile planet. (Pp.38-39).

Hall (2002) emphasizes that a transformative education can encourage the "release of our creativity and imagination" and to become as Paulo Freire noted "agents in our own history"(p. 44). A "new utopia" is inspired by indigenous knowledge and can be found in local community gardens, in individual and family choices to live more simple lives, and in the still growing "green economic development movement." Reinforcing this perspective, Jack Miller (2002) suggests that a "meaning-centered curriculum" would not only address the needs and aspirations of students, but it would examine ways to reduce problems like poverty, conflict, mental illness, homelessness, racism, and social injustice. Learning cannot be compartmentalized and viewed solely from a cognitive process. "From a spiritual perspective, learning does not just involve the intellect; instead, it includes every aspect of our being including the physical, emotional, aesthetic, and spiritual."(p.243)

In "The Project and Vision of Transformative Education" Edmund O'Sullivan (2002) further posits that educational institutions at all levels need to play a pivotal role in fostering a sense of community. There is the need to move away from a consumer based society and into one that is life-sustaining and inclusive. "Contemporary education today suffers deeply by its eclipse of the spiritual dimension of our world and our universe….It has also been compromised by the vision and values of the market. In a world economy governed by the profit motive, there is no place for the cultivation and nourishment of the spiritual life. As a result of the limits and inadequacies of contemporary life, many people are looking for a different way of approaching education that integrates academic and social issues.

 O'Sullivan (2002) suggests that educational initiatives can focus on bioregional studies that would help students develop a greater awareness of place. Bioregional study would involve a study of the land, the history of the community that has occupied a particular region, and the histories of the people in each bioregion. "Education for the purpose of cultivating a sense of the history of an area enables people to have loyalties and commitment to their place of their dwelling." (p. 9). Creating an awareness of a sense of locality and place can "correct and realign" global inequities and a lack of resources. It can also encourage human ingenuity and self-direction, note O'Sullivan. From this perspective, personal change and progressive social change are interwoven.

An Integrated Approach to Teaching Social Justice: The UNESCO Schools Association of Manitoba

The application of the global-planetary perspective of transformative learning directly links to a current qualitative study that is focused on exploring the conceptions of social justice of 20 teachers and administrators from various elementary and secondary schools in Winnipeg. Many of the teachers and administrators who are participating in my study are part of the UNESCO Associated Schools network. UNESCO Associated Schools is part of global network of schools that promotes quality education through the integration of social justice themes that are linked to global issues, peace and human rights, intercultural learning, and education for sustainable development. Interestingly, many of the themes highlighted in the UNESCO Earth Charter (www.earthcharter.com) reflect the different strands of transformative learning theory. In sum, the teachers I have interviewed so far express a need for learning to extend beyond the traditional classroom and the acquisition of basic skills and functional literacy. The commitment of the teachers and administrators that I have observed speaks to a need for educators to connect with the larger community of learners –not only in the Winnipeg locale but internationally. "Transformative" education, from the perspective of these educators, involves responding to the economic, technological, political, and social changes that have taken place in recent years in ways that are relevant and potentially empowering for their students. The participants in my ongoing study spoke of the importance of education to change lives along individual, local, and global dimensions. Learning is seen as comprehensive and holistic and the process extends beyond the classroom. When I asked the participants to describe their role in the school, they identified themselves as a "problem solver", "guide", "advocate", and "cultural mediator". One principal connected the image of a "key" to his own role as a facilitator who "opens doors" to potential projects and new ways of thinking and learning. He further explained that "while our teachers are at different stages in their learning and their career, they have valuable skills, patience, and creativity. They may not directly state it, but most value the ideals described in the UNESCO Earth Charter. I look for qualities like commitment, caring, and the ability to connect with challenging students. It is important to have most of the teachers "on board" when a school decides to embark on a project such as growing a community garden and then donating the food to a local charity. The success and planning of so many of our UNESCO initiatives have started with teachers who come to me with great ideas. I help them organize the parameters in realistic ways that will be acceptable to all---the students, the teachers, and the parents in the communities."

The approach to learning and teaching that the educators hold is holistic; the UNESCO themes are embedded in the mission of the school, in the curriculum, and in the specific teaching and learning practices applied. The perspectives of teaching and learning expressed by a number of the participants reflect these themes:

The UNESCO themes of social justice are embedded in our school and in the curriculum for all subjects. It is not an "add on" nor is it simply about "fund raising" to build a school in another part of the world. Without helping students respect themselves and care for each other, initiatives such as food drives and building a new school in a developing country will be limited. At our school, we start with an emphasis on self-awareness and a developing of basic interpersonal skills like listening and empathy. Having said that, we also encourage the value of local initiatives like community gardening and helping students meet and dialogue with children and elders from communities that they might be very unfamiliar with. The artwork you see around the school is a representation of the cultural diversity of our students and it is their representation of different forms of social justice. I see learning as a broadening of community; it is also about gaining self-knowledge. Learning is about being open to possibilities, challenging yourself to the limit, and reflecting about you have done.

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We live in 'have and have not' society. Even in this school, we have students from both very affluent families and others who face economic hardship. A significant proportion of our students come from single parent homes. The common thread is that they are a part of this school and it represents a positive community where everyone has knowledge and experience to share. We have to find concrete ways to help our students improve their own lives and then move beyond themselves to improve their communities.

We are also living in a world that is rapidly becoming smaller and many people live in conflict. The UNESCO themes provide a more creative means of dialoging that enables students to see beyond themselves in more reflective ways. For instance, social media like Facebook ,etc. may have many benefits but it is also a Pandora's box. How can we help students navigate the dangers? Emotionally and cognitively, we are bombarded with images and "information" that many people do not question. This creates anxiety and confusion. I try to encourage students to question and critically examine what they see and read. The quote that best sums up my approach to integrating the UNESCO themes is from Mahatma Ghandi: 'Become the change you want to see.'

By working on global projects such as raising money to build a school in Sri Lanka or Kenya, my students see in very concrete ways how poverty, race, and social class impact the basics we often take for granted here in Canada. Some of the students will have the opportunity to travel overseas and experience a different culture. This global learning experience has the potential to activate positive change in their own lives and communities.

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Many of our students come from disenfranchised backgrounds. They have experienced hardship in some form whether. They may be from a war torn family or they may have had a traumatic childhood just growing up here in the city. A piece of their lives is missing in some way---they have just been divorced, they just got out of jail, or they are getting off drugs. You meet amazing students here who have been excluded from society in some way and they see our school as having a key to living a more purposeful life. I was a UNESCO teacher long before I joined the UNESCO network. To me, at a very fundamental level, it is about a culture of caring. I see myself as an advocate and problem solver. I will stop to help a student find the right day care or a good lawyer if she/he is in trouble.

Mirrors and Windows: Developing a Transformative Curriculum

A number of the teachers in the UNESCO schools that I interviewed view curriculum content in courses like English, History, and World/ Global issues as a both a "mirror and window" that has the potential to empower students personally and academically. While specific classes have curriculum units framed around UNESCO themes, the school at large provides an opportunity for students to participate in groups like the sustainable development committee. Short and longer terms projects are collaboratively organized by faculty members and the student body. Anna, an English teacher at a large secondary school in Winnipeg, explained that social change begins with personal change and that the pilot Grade 12 Global issues course of "learning to do, learning to know, learning to be, and learning to be together" parallel the five general learning outcomes in the English Language Arts curriculum. These outcomes include: exploring ideas thoughts, and feelings; responding personally and critically to texts; clarifying and extending ideas; and celebrating community. Anna asked: "How do we move beyond the superficial UNESCO categories and themes into learning that involves significant personal and social change? Her approach is multi-faceted and interdisciplinary. She explains that the broad UNESCO themes such as issues of world concern, environmental sustainability, intercultural learning, and human rights, democracy, and tolerance can be woven into the curriculum in many different ways. In the "Perspectives of War" unit, students examine the nature of war from different voices---the voice of a child, a soldier, etc. Anna explained that reading memoirs like Ishmael Beah's *A Long Away Gone* or *I, Rigoberta Menchu* can encourage a greater awareness of human rights and democracy voices of children in war, soldiers, the struggle against oppression, and the concept of "freedom fighters."

The work produced by the students at the UNESCO schools reflected a balance of individual and global awareness. One student at an adult learning centre was generously sharing recent writing projects he had developed. Roger designed a comprehensive research proposal to create a "dedicated, volunteer-based storm/flood planning emergency response agency in Manitoba." He wrote extensively about Manitoba and its history of flooding. Another research paper he completed focused on the topic: "Fear is the primary barrier against a true global community." His analysis included an insightful discussion of Jeremy Rifkin's (2010) *The Empathic Civilization: The Race to Global Consciousness in a World in Crisis*." Integrating sociology, psychology, and political studies, this student demonstrated creativity and critical thinking skills that skillfully integrated local and global issues. He examined the way North American society has responded to living in a post 9/11 world. He argued that fear is a basis of racism, gated communities, organized crimes, and acts of terrorism. We need to find "global" solution if we are to refer to the "residents of Earth" as a single unified people in search of peace and universal values.

Martina, another secondary school teacher in Winnipeg encouraged her students to read international short fiction and they are asked to write about race, class, and gender as these categories related to issues of personal and global concern. One UNESCO themed learning project featured a photo contest called "Rachel Carson—Sense of Wonder" to highlight the environmental awareness unit. Students could present in a photographic essay or montage their own visual images and photographs of wonders of nature that they have observed in their neighborhoods or in the city. She emphasized that the students would be expected to take the pictures and organize their photos in a way

that told a story of their "wonders of nature" in their own community. Other activities included students creating a recording project titled "songs for peace" and to encourage intercultural learning, students were interviewing their peers from different cultural backgrounds. This teacher explained that "it is not always easy to measure UNESCO goals as a lot of learning is personal and incidental. I also am always asking myself : how do we move beyond superficial goals and how do we encourage 'change within for social and global changes." Peer tutoring and menotoring, group discussion and focus groups, journal reflections, and self-evaluation were some of the learning strategies she applied. Applying the UNESCO themes has relevance in all subject areas. In Chemistry, for example, a unit examining the "world of water" can raise awareness about the need to protect our oceans and fresh water supply. One of the world issues classes create a wall mural depicting UNESCO themes on the school walls. The students are involved in UNESCO themed projects in specific classes such as World/Global Issues, English, Chemistry, and Digital Photography, and the larger student body is also involved in collaborative projects that enable the students to video conference with students in different parts of the world They are introduced to the work of groups and organizations such as War Child Canada, the Siloam Mission, Winnipeg Harvest, and Engineers without Borders. The students are involved in complex experiential learning projects that provide them with opportunities to meet individuals from groups such as Engineers without Borders or they take part in video conferences such has the Copenhagen Conference on Climate Change. Their approach to curriculum planning is creative and flexible and they allow their students to explore themes connected to social justice in various ways. Themes related to choices, responsibility, identity(ies), gender, race, and culture become an opportunity for their students to develop greater self and social awareness.

Institutional norms and expectations, assessment protocol, and "unwritten policies and procedures" Teachers and counselors, in particular, can play a vital role in assisting learners to become more critically reflective and open to choice and change. However, they need to have opportunities to discuss their perspectives of the way their courses and the school can lead to personal and social empowerment. The "nature of dialogue and relationships between teacher and students and among students" are catalysts to significant personal learning and transformative change—whether the change be in self-concept, a expanding conception of the intersection of race, culture, gender, and experience, and how these factors impact local and global events. Rather than viewing themselves as an "enforcer of institutional norms," Taylor(2008) suggests that teachers begin to see themselves more as an advocate for students. However, the reality, is that each school is a unique community that may or may not value transformative teaching and learning. As practitioners and researchers, we need to further our knowledge of transformative learning and work toward breaking down barriers that prevent teaching for social justice --- individually, socially, and globally. Taylor suggests that teachers need more opportunities to discuss the barriers that may constrain the ability of some teachers to develop authentic relationships with students that might promote transformative change. Finally, theories of transformative learning becomes particularly relevant in the context of understanding the way in social justice can be connected to solving problems of inequity at individual, community, and global levels.

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The Power of Praxis:
Transforming Pedagogies and Practices in Graduate Leadership Education

Richanne C. Mankey, Ed. D. and Donna Stoneham, Ph. D.

Abstract

Participants will be provided with experiences that incorporate making meaning from lived experience as well as exposed to four themes. Perhaps the greatest leverage point for leadership today is transforming self through praxis. We posed the question, "How do we take risks and encourage future leaders to make shifts in consciousness and leadership practices that transform both our impact as leaders and create a sustainable future?" Thus, emphasis in class is on developing wisdom, knowledge, way-of-being, skill building, body, spirit, emotions, relationships, and mind. We encourage, challenge, and support students' development of both leadership skills and multiple aspects of intelligence.

Introduction

As leadership educators, we believe the greatest leverage point for transforming leadership today is transforming self through reflection and action—praxis. Skill building is important but alone inadequate to prepare aspiring and seasoned leaders to face complex challenges. As educators the academy has taught us to develop the mind. Thus, supporting development of "other" aspects of intelligence has been uncomfortable, if not off limits.

Research grounded in integral and holistic leadership transformed our pedagogy and practices for developing leaders. As scholar-practitioners, we posed the question, "How do we take risks and encourage future leaders to make the shifts in consciousness and leadership practices that transform our impact as leaders and create a sustainable future?" It is from our answers to this question that our research, our personal transformational journeys, and the innovative ways we conduct our leadership classes grew. Our classes now place as much emphasis on developing wisdom as on knowledge, on way-of-being as on skill building, and on developing body, spirit, emotions, and relationships as on developing the mind.

In this session participants will be provided with experiences that incorporate making meaning from lived experience (Mezirow, 2000, 1990) as well as exposed to four themes relative to transformative learning and transformational leadership: 1. Synergistic learning—a shift in our relationship to power; 2. Examine leadership deeply; 3. A call to imagination and transformation; and 4. Transformational leadership that builds and sustains diverse relationships across cultures and boundaries.

Synergistic Learning—A Shift in Our Relationship to Power

In our classrooms, we have dramatically shifted the traditional frame of "teacher as expert" to one of shared power, which enhances accountability and participation. It is also our premise that great leaders not only know their subject matter, but have developed wise relationships with self and others (Northouse, 2010; Ruiz and Ruiz, 2010; Quinn, 2004, 1996; Goleman, 2002, 1995; Zander and Zander, 2000). We believe that the most difficult of these relationships to develop is our relationship with self because it is easy to be fooled by widespread beliefs that our problems are caused by "others."

Critical to our teaching philosophy is our belief that balance is necessary for good leadership—confidence and vision balanced with a healthy ego and holding others in a perspective of positive human regard. To hold this balance and look deeply at leadership, we use readings, practices, peer coaching, dialogue and reflection in our classes. Our aim is to facilitate understanding of balanced leadership in our students, while practicing and sharing our experience of transformative learning from our own learning and use of internal leadership principles—ever so imperfectly— to invite our students to explore what leadership entails.

In class, students are asked to read and communicate with each other (as comfortable) their reflections on *The Fifth Agreement* (Ruiz and Ruiz, 2010), *The Art of Possibility* (Zander and Zander, 2000) and *Building the Bridge as You Walk On It* (Quinn, 2004) . It becomes apparent from dialogue grounded in trusting relationships that many of our leadership issues are best addressed by looking deeply within ourselves. As Mankey (2013) says:

> My personal reflective practice was advanced by ancient Toltec wisdom. The five agreements (Ruiz, 1997; Ruiz and Ruiz, 2010) give us a practical structure through which to launch our own personal and spiritual growth using reflection. The structure is simple, yet the work is intense, ongoing, and transformational. It is not easy to practice the ongoing spiritual dialogue with ourselves that Ruiz and Ruiz (2010) suggest. When we choose to do the personal work, transformative learning is promoted in ourselves, thus in others. (np)

In order to keep the power equitable between students and professor, both Mankey and Stoneham share their own dilemmas related to the ever imperfect and ongoing work of personal and leadership development, while framing those dilemmas within the context of the readings (Ruiz and Ruiz (2010) and Quinn (2004). For example, in Mankey's classes, students report in their weekly assessments of her classes (called one-page papers as inspired by Light, 2001) that Mankey's disclosures validate their own dilemmas. One reason this happens is because she is open to be challenged by the students' suggestions about her own disclosures. At first, this process of equalizing power in the classroom can be uncomfortable and disconcerting, yet as the practice becomes a habit, all benefit from the authenticity of the discourse.

As leaders, many traditional theories have suggested that the leader should always be in control and know the answers. More recent leadership theories encourage leaders to examine areas of personal vulnerability and to look within where the source of many dilemmas reside. Because we know the concept is simple, we cultivate the courage it takes to acknowledge our own vulnerabilities with our students. When we model being honest about our own challenges, it becomes less daunting for our students to begin their assessment of a leadership dilemma by looking at themselves, rather than "other." Learning in a synergistic environment leads to a deep examination of leadership—of self and of others.

Examine Leadership Deeply

As Albert Einstein said, "We cannot solve our problems with the same thinking we used when we created them." To examine leadership deeply we balance self-knowing with developing and applying leadership skills and theory. As transforming the self requires transparency and vulnerability, we have discovered that when we are authentic and vulnerable with our students, they are more willing to be the same. For us to provide an environment conducive to self-discovery and learning, we remain committed to our on-going work at being fully integrated human beings. We believe that the educator's reflective capacity is a core competency for developing effective leadership in others (Ruiz and Ruiz, 2010; Barbour and Robinson, 2010; Light, 2001; Drath, 2001; Zander and Zander, 2000; Thompson, 2000; Quinn, 1996; 2004; Covey, 1989).

Covey (1989) is one of the foundational books used in the masters program at Daemen College. His "seven habits" also inform leadership and arise from his desire to find our way out of the "personality ethic" back to the "character ethic" as leaders. These seven habits often come into the discussion when students and professor are examining leadership. Of particular interest is Habit 5: Seeking first to understand, then to be understood. Not only is this habit about actively listening to other people without trying to formulate our response while we are supposed to be listening, it is also about being able to assert our opinion in the most loving way possible. In order to participate in the second half of the habit, we are challenged to know ourselves and our hearts. Mankey often shares with her students that when she first read the book, her thinking was, "Of course, I believe and do these things." Yet, as she prepared to teach one weekend class during the program director's absence, as she re-read the pertinent chapters as well as the introduction, she thought, "Wow, I have some work to do with regards to these habits." As she began to read the book for the third time, she thought, "@&%, I have LOTS of work to do." Her oft learned lesson was that we can understand and be knowledgeable about concepts and good ideas for our practice of leadership; actually behaving in ways that reflect what we understand and know is the heavy lift. What Stoneham emphasizes in her highly interactive MBA classes is the challenge of great leadership is learning how to integrate what we do (the functional skills of leadership) with our way-of-being (the way we show up) in the world.

Leading organizations is a tricky business because the current paradigm embraces good leaders as individuals who generate profit and results. Collins (2001) studied "good" companies and discerned which of them had become "great" companies and the reasons why. The reasons are compelling and timeless because they have to do with the leader. Many of the companies determined to be "great" as published in 2001, would no longer be on that list. However, the concepts unfolded are inherently about the capacity to build good relationships, and leading, without force of ego, through those relationships. Success can be defined not by profit alone, but in tandem with the quality of authenticity of our relationships—the human factor—in our profit-making.

Steinbrecher and Bennett (2003) advocate leading from the heart. They encourage a process of "letting go" which we use with our students (Steinbrecher and Bennett, 2003, p. 97). To get trust, we give trust; to get sincerity, we act with sincerity; to get compassion, we act with compassion; to get good results, we ensure everyone understands what good results are and what the means are to obtain them. We find these concepts are simple to understand, yet difficult to practice. They are appropriate for the classroom, the corporation, or higher education administration.

A Call to Imagination and Transformation

How to shed ingrained societal habits of fragmentation and competition for integration and collaboration will be explored in our session. Additionally, we provide students with opportunities to identify and begin to move towards leadership that is "being and becoming the values you treasure" (Mankey, 2007, p. 121). Stoneham believes that creating classroom experiences that call aspiring leaders to "step-up and step-in" to solve individual and organizational dilemmas serve as a powerful catalyst for creating transformational change in individuals, teams and the organizations they serve (Stoneham, 2010).

In the Executive Leadership and Change (ELC) masters program at Daemen College, Mankey guides a course called Transformational Leadership. Prior to her teaching the class, a faculty member used case studies from *Harvard Business Review* and other sources to encourage leadership thinking and actions of students. The ELC program has a foundation in Creative Problem Solving (CPS) so Mankey wanted to engage the students in their own process of transformation related to leadership. At the beginning of the course, she asked students to consider sharing their own leadership dilemmas, directly from their current employment, to be able to engage fully and personally in this course. She explained that it would require students to trust each other and have confidence enough in each others' abilities to challenge them in a compassionate manner. Students embrace this idea and share freely—so does she. All were vulnerable to their own perceived inadequacies as well as to the wrath of the rumor-mill should one student break the confidences of the classroom setting. Stoneham conducts her classes in a similar way, through honest sharing of lived experiences.

In Mankey's class, as the course proceeded, students progressed through readings (Ruiz and Ruiz, 2010; Zander and Zander, 2000; and Barbour and Hickman (Eds.), 2011), and "dug in" to leadership dilemmas in a style similar to group-therapy of the counseling profession. Tentatively at first, and then more boldly, students unfolded their leadership dilemmas. Mankey's role in discussions—including during her own sharing—was to help students focus on self, not other. As the course progressed, each student reported that they were developing ways of reflecting in action using "tools" from the readings that resonated with them. In Stoneham's class, each student selects a peer coach to work with within and outside of class. Each student crafts a personal development plan with the assistance of a peer coach, as well as a "leadership in action" project in which they use the project as a practice field for developing their stated leadership goals and intentions.

The transformative learning challenge of leading from a place of authenticity is actually behaving in ways that we believe. To do so, we first examine our values and clarify them if necessary. In both Mankey and Stoneham's classes, we work with our students to shift our lens from focusing on our inability to "always giving our best" (Ruiz and Ruiz, 2010) and reframe it as a gift to practice living our values more fully. As the guide for our classes, our goal is to help both ourselves and our students shift our habits-of-being (Yorks and Kasl, 2002).

Transformational Leadership that Builds and Sustains Diverse Relationships

Transformational leadership that builds and sustains diverse relationships across cultures and boundaries; it also asks us to expand and integrate the boundaries of thinking, language and action. In an international world with fewer boundaries, we are called to create and sustain diverse relationships across national, religious and

philosophical boundaries. We support our students' expansion of their worldview, their awareness of the impact of language in creating the outcomes they seek, and their access and use of multiple forms of intelligence. Capability to use inclusive language draws "others" into more collaborative ways of thinking and interacting; developing and leveraging multiple sources of intelligence (emotional, somatic, spiritual, relational and cognitive) offers a more robust repertoire of possibilities for action as leaders in the world (Stoneham, Weger & Rocco, 2006; Stoneham, 2009, 2010; Ruiz and Ruiz, 2010; Goleman and Lama, 2003; Goleman, Boyatzis, McKee, 2003; Goleman, 1995).

Inclusive language is not necessarily something we have been conditioned to use. Instead, we have learned a language of competition, not collaboration. Retraining how we think and speak is a process. In classes, we hear many words that we use easily without thought. Awareness of our use of these words and how we feel when someone uses them, helps us be more aware when we are using words of exclusion in our speech. If we can suspend our judging lens of "you just need to . . ." or "if you would only just . . . ." and can instead discern our own role or feelings in the situation, reflection in action provides us immediate feedback to be conscious of the impact of our language. Choice is often a topic of dialogue in the classroom. When we understand that we not only have a choice about our own language, but also about how we receive someone else's "less than inclusive language" we are better positioned to own our position and embrace, not resist, "the other." Encouraging choice is a matter for the leadership classroom because choice is a powerful tool for leading authentically, integrally, and holistically.

Closing Comments

Through praxis, students develop a more integral/holistic way of perceiving and being in the world. In this session we discussed our practices and tools while simultaneously providing opportunities for participants to identify values and beliefs; to reveal gaps between beliefs and actions; to use reflection and action to develop exemplary leaders, and to encourage self-observations to deepen and integrate conscious awareness and group support of current leadership dilemmas. All are central to the process of making meaning of lived experiences and transforming them for future use through praxis. Our strategies engage participants affectively because emotional experience heightens awareness of leaders' ways-of-being. Heightened awareness leads to altered habits-of-being which leads to excellence in leadership. We demonstrate and explain how we create safe, caring, learning environments where vulnerability and authenticity are modeled and encouraged. By doing so, we create mutual opportunities for learning, transformation, and new ways of being for both students and faculty.

As careful as we are about not invoking our own values as we explore students' values, inherently this premise is flawed. It is flawed because we offer the class based on our values of transformational leadership, our belief in finding and leading from our authentic self, and our belief that transformative learning is possible. Accordingly, students often experience a disorienting dilemma when they begin learning about leadership differently while seeing and using "traditional" leadership in their places of employment. Some challenge the traditional practices to make a difference in their organizations; others seek employment to make a difference in a new organization. Both decisions involve risk.

It is our perspective that good leadership is about serving others with humanity for the purpose of ensuring the entity we serve is sustainable. Practicing leadership with a solid foundation in authenticity while engaging the four themes we purport here affirms what Carse (1986) elaborates, "There are at least two kinds of games. One could be called finite, the other infinite. A finite game is played for the purpose of winning; an infinite game is played for the purpose of continuing the play." (p. 3). As faculty members in leadership and MBA programs, we hope to guide with appropriate levels of challenge and support, practices that "continue the play."

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Artful Inquiry in the Studio of Life: A Playful Engagement with Our Conference Experience

Virginia May, Ph.D. and Nika Newcomb Quirk, Ph.D.

Abstract

Artful Inquiry (Barry, 1996; Seeley, 2011) is an inquiry process that pushes epistemological boundaries to include movement, storytelling, art-making, sound, circlework and silence. Informed by experiences with studio practice in visual and improvisational arts, the authors construct an accessible framework within which to conduct transformative learning. Incorporating multiple ways of knowing and cycles of action and reflection in a spiral learning process assures that practice is congruent with beliefs and that transformative learning is possible. *The Studio of Life* supports everyday personal and professional creative inquiry practices as we construct a new future for self, community, culture and earth.

Keywords

Art, Inquiry, Studio, Experience, Practice, Great Turning

Introduction

As we (Nika and Virginia) wrestle with planetary, social and individual challenges accompanying the profound changes of our time, we ask ourselves "*What kind of practice might bring people into full participation with both the realities of the present and the possibilities for the future?*" We identify strongly as arts-informed scholar-practitioners and bring a transdisciplinary, participatory perspective into our work with collaborative inquiry groups in a variety of professional and casual environments. We emphasize the importance of embracing experiential, transformative learning approaches.

Expressive arts and the concept of the studio as a place for reflective, creative practice applied in cycles of learning can become valuable assets in constructing an evolving self, community and culture in an environment of change. Bringing our experience with studio practice in visual and improvisational arts, we contend that humans are able to conceptualize and access this creative space for inquiry in daily life. We adopt the term *artful inquiry* (Barry, 1996; Seeley, 2011) to describe an expanded inquiry process that pushes epistemological boundaries to include movement, storytelling, art making, sound, circlework and silence. We find that artful inquiry combined with action research methodologies provides accessible frameworks for establishing everyday personal and professional practices that foster mindfulness, transformation and ongoing learning as we construct a new future for earth. Below, we use our voices to lay a foundation from what we know together, and separately, about our personal practices of artful inquiry, transformative learning theory, working in liminal spaces, the criticality of studio space, and artful inquiry methodology that includes spiral process and the arts as extended epistemologies.

Artful Inquiry - Roots and Relationship

We (Virginia and Nika) met as doctoral students and quickly found how closely our questions were intertwined. Both artists, we brought a tacit understanding of extended ways of knowing (Heron, 1996) and a restorative purpose to our research. We both sought to shine light into how artists and artful practices contribute to re-engaging people with the land, each other, and the work of the Great Turning (Berry, 1999).

From early on, I (Nika) responded to the world by moving and telling stories, and my lifelong expressive arts training began at the age of 3. As a young girl, my play studio was the wilds of an Eastern Pennsylvania forest. There I was a daily participant with the more-than-human world (Abrams, 1996), coming to know myself as a being on earth. Play became my foundational epistemology. Work and education systems eventually privileged other ways of knowing, and my artful practices became often-neglected sidelines, evidencing a parallel neglect for the essential ways that I apprehend reality and imagine a future. Discovering my natural affinity for "the work of the improviser" (Nachmanovitch, 1991) in the early 1990s reignited my native epistemologies and opened my understanding of the potential of improvisational practices as inquiry methodologies. From this sprouted my dissertation, a participatory artful inquiry into collaborative leadership and how it is challenged by individualism (Quirk, 2012).

I (Virginia) have the soul of an artist and depend on multiple ways of knowing to navigate the ever-shifting complex systems of reality. More specifically, I gravitate towards participatory ways of knowing (Heron & Reason, 1997) and use the practice of making art to understand who I am in relation to the human and more-than-human world (Abrams, 1996). For me, making art is a method of coming to know "the patterns that connect" (Bateson, 1999). In 2009, I facilitated a co-operative inquiry doctoral research project for a group of seven women who feel deeply connected to the earth. In *Down to Earth Women Searching for Eco-Sustainability: An Arts-based Co-operative Inquiry,* we explored our deepest spiritual, political, and philosophical beliefs about the core issues of identity, the arts, sustainability, healing and transformative social action.

From our (Virginia and Nika) root experiences, our artistic journeys and our academic grounding in participatory research, we find a strong relationship between transformative learning and the emerging work of creating a life-sustaining world. We emphasize the criticality of applying transformative learning theory in developing radical, accessible transformative learning practices capable of supporting humans to shift into deeper awareness, resilience, imagination and relationship.

Theory - Transformative Learning Praxis

We (Nika and Virginia) concur with researchers who have charted a progression through three general stages of transformation: (a) the trigger event, which causes discomfort, confusion, disorientation, and a motivation; (b) exploration of previous assumptions; and (c) integration of the new insights into a new way of being in the world (Cranton, 1992, pp. 69–72) and argue for a supportive environment and field required for successful positive change. Transitional support, in the forms of safety, care, affirming relationships, acceptance, listening, self-awareness, and equality, is needed to achieve integration of new experiences or new information so that the transformer can progress to more complex ways of knowing. Supported learners are more confident, have an assured sense of personal efficacy, are more capable of becoming critically reflective of habitual and sometimes cherished assumptions, and have the self-confidence to integrate and take action on reflective insights (Mezirow, 2000, p. 25).

Daily, in my work as a leadership coach and facilitator, I (Nika) witness how the structural elements of the existing social paradigm "limit or shape the ways in which we come to understand who we are as persons and communities and what might be our best interests" (Dirx, 1998, p. 8). In the U.S., we are encountering "trigger events" economically and environmentally that can and do inspire reflection and change. My personal activism is grounded in introducing mindful, dialogical, creative and active elements in every context because "transformative learning aims at identifying these [limiting] forces and freeing us from their coercive influence" (1998, p. 8). I consistently witness how artfully inquiring in supportive environments powerfully transforms our engagement with our questions, our sensemaking, and our relationships to our co-inquirers.

When I (Virginia) reflect on my life's journey through healing from childhood trauma abuse I am struck by how consistently I have intuitively used art as a way of knowing (Allen, 1995) to make sense out of no[n]sense. I too established a foundational epistemology through a kinship with the natural world. Combined, the two ways of knowing have been the core means by which I have forged "a deep, structural shift in the basic premises of thoughts, feelings, and actions . . . a shift of consciousness that dramatically and irreversibly altered my way of being in the world" (O'Sullivan, 2003, p. 327). I have as an adult translated the skills required to manage the anxiety, uncertainty and confusion associated with the dilemmas and paradoxes of my early life changing experiences into my professional career as an artist and the director of a community arts center.

We (Nika and Virginia) believe that the skills learned in an artful inquiry process are applicable to the challenges of navigating the liminal spaces of transformative learning and in healing from the wounds inflicted by the industrial growth society (Korten, 2006; Macy, 1991).

Artfully Inquiring in Liminal Spaces of Knowledge

Artful inquiry emerges out of developments in qualitative research such as Action Research and arts-based methodologies. McNiff (2008) proposes that, "the arts, with their long legacies of researching experience, could be used as primary modes of inquiry" (p. 30) and knowledge creation. Seeley (2011) characterizes artful inquiry as "a call for full-bodied engagement [through which] we learn from our more-than-intellectual selves and the more-than-human world in ways which are essential if we are to positively respond to our planet (p. 85)." In our practices, we (Nika and Virginia) often perform at the liminal spaces of knowledge and have developed methods to apply creative media in response to the subject/being/environment through which we begin a conversation with our subject, thus coming to know it more intimately.

As an improvisational artful inquirer, I (Nika) have learned to be 1) comfortable with uncertainty, 2) deeply present and 3) attuned to what is emergent, three attributes that deserve development in this age of crumbling and emergence in the human system. Through Halprin's 5-part psychokinetic imagery process (2003, pp. 141-143), I learned to engage in what she terms confrontation, i.e. "to meet and to encounter what is present" and through movement and drawing, to lean into "metaphorically or symbolically becoming it or going into it" (p. 125). Integrated in cycles of such action and reflection, this process leads into interpretation of meaning and expression in words, and potentially into implementation through our beliefs, decisions and behaviors.

I (Virginia) approach the world with the soul of an artist bringing a highly developed capacity for *aesthetic response* to the challenges of everyday life. An aesthetic response can be described as a sublime or beautiful experience in response to a participative relationship between creator, material, audience, and culture. When we perceive and experience patterns in our environment, in our relationships, and in ourselves or resonate with complex patterns in the universe such as cycles, spirals, symmetry, waves, crystals, and so on we increase our sensitivity and deepen our understanding of the living environment. This goes contrary to the all-too-frequent *anesthetic* or numbed response to the world around us (Knill et al., 2005; Sabini, 2008). The liminal space found in artistic ways of knowing open channels of knowing that are not limited by rationality.

Recognizing that engaging with uncertainty and complexity requires a supportive environment, we (Nika and Virginia) recommend utilizing forms of studio space as boundaried settings for artful inquiry and transformative learning.

Method - The Artful Inquiry Studio Space

In our conference session, we (Nika and Virginia) introduce the artful inquiry studio as portable and constructed intentionally as follows: 1) a boundaried space is outlined, with actual or symbolic walls; 2) a central inquiry focus; and 3) ways of warming up group connection and interaction that strengthen the sense of being in a social space. We both know studios to be sacred space where a "pervasive sense of safety and even sacredness can emerge" (McNiff, 2004, p. 29) in which what is and what emerges can be confronted and learned from. We devise the artful inquiry setting to encourage and support mindful creativity. We recommend extending inquiry practice into every corner of our lives, thinking of it as the *Studio of Life,* to make artful inquiry an accessible practice for navigating the uncertainty of our lives.

I (Virginia) have spent literally thousands of hours in art studios beginning with the attic art room in elementary school and have opened creative spaces in closets, warehouses, storefronts, living rooms, beaches, garages and so on. An *open studio* is a space created specifically to encourage creative risk-taking. It is a space where rich interchanges of form, color, tools, ideas, patterns, textures and processes can freely interact. It is a permissive place that provides the rich mix of ingredients, a flourishing environment that is alive with creative tensions and open to infinite possibilities. An open studio encourages me to jump into the unknown, face ambiguity, and hold paradox so that I can generate new iterations of thinking and being in the world. An open studio often invites others into creative collaborative social creativity (Montuori & Purser, 1999).

As I (Nika) considered the question of what a leadership studio might look like in my doctoral research, I longed to return to the familiarity of a movement studio. Considering, however, that I was intending for artful inquiry to be an accessible practice for leadership teams, I broke out the walls of my own thinking through artfully inquiring. An image emerged (see Figure 1 below) representing an inquiry process in a social space through which participants socially constructed, through dialog and agreements, a portable studio dedicated to group flow and transformative learning.

Figure 1 - Socially Constructing the Artful Inquiry Studio Space
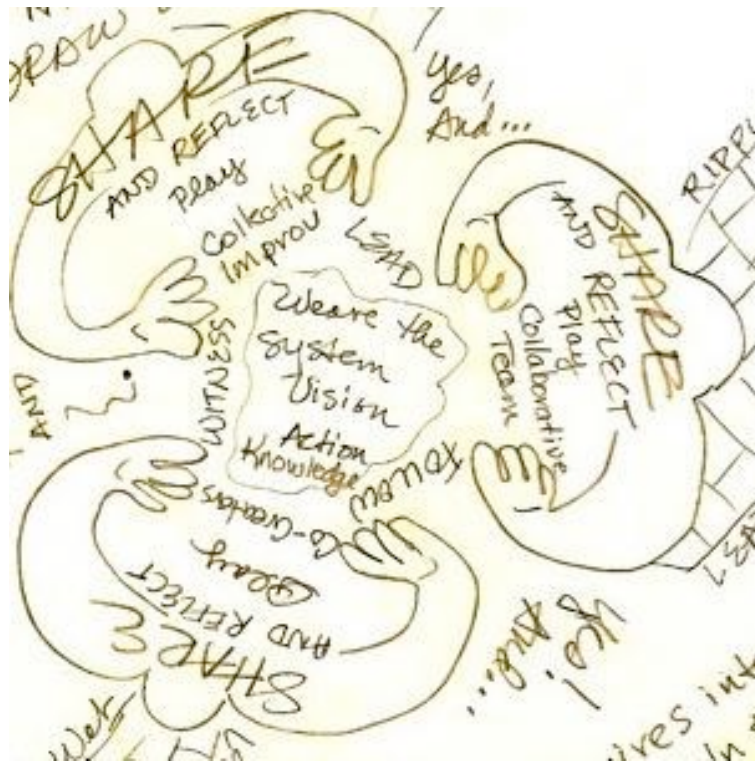
Having socially constructed space for artful inquiry, we enter into what we (Nika and Virginia) call spiral learning processes where the arts as epistemological practices can be embedded in cycles of action and reflection.

Method: Spirals, Arts and Extended Ways of Knowing

Artful inquiry is primarily concerned with presentational or expressive ways of knowing. However, in order to fully participate in the transformative learning process, the participant enriches their experience both by spiraling through multiple ways of knowing and cycles of action and reflection over time. Multiple ways of knowing as adapted from Heron and Reason (1997) include: experiential (nonverbal, raw feelings); presentational (imaginative expression); propositional (theoretical) and practical (hands-on implementation).

Spirals of Learning (see Figure 2 below) is a model derived from Virginia's Arts Based Cooperative Inquiry (May, 2011). Adding critical subjectivity to the spiral of learning contributes to validity of knowledge and can lead to experiences of responsibility, agency, and authority. In practicing Artful inquiry, we (Nika and Virginia) challenge ourselves to observe and artfully express ourselves as a product of, and a participant in, various ecological and social groups. Taking a critical look at our subjectivity means that we attempt to observe our experience as it unfolds in action. As artist-researchers we know that there are aspects of self and others to which we are blind. This blindness often leads to incomplete or erroneous conclusions about important environmental and social issues. Spiraling through multiple ways of knowing, and through cycles of action and reflection, in an artful inquiry practice is a method we use to *test* our ideas in action and vice versa to see if our experiences and beliefs are congruent.

Figure 2 - Spirals Of Learning
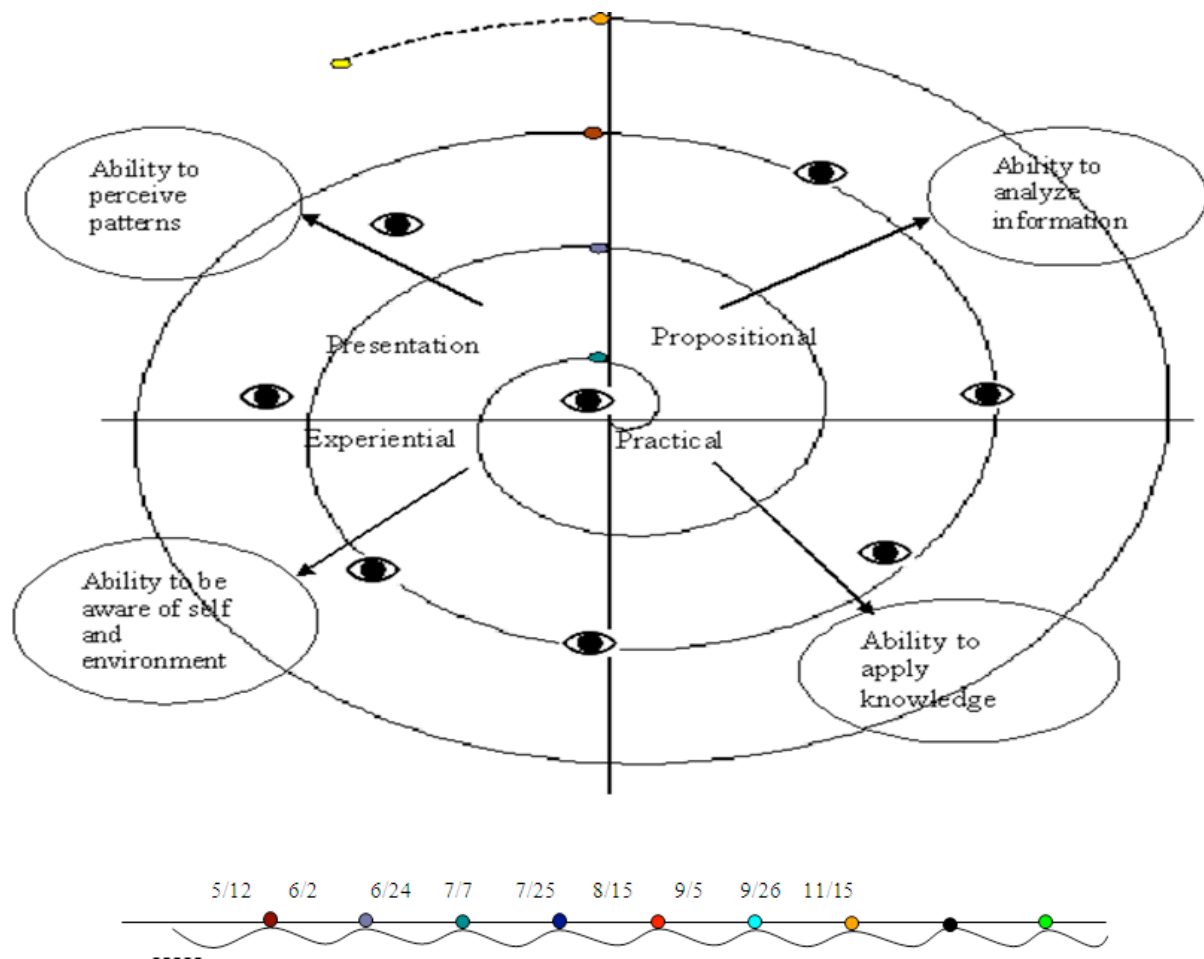
In creative practice, I (Virginia) engage in an aesthetic inquiry process of trial and error. In the course of my artistic career, I developed a system of questioning myself with every brush stroke; an internal process that occurs almost continuously while I work. Through a detailed examination of the process of creating visual art, I recognized clear cycles of action and reflection. The action of applying a color to paper stimulates a reflective response that dictates my next creative act. Cycles of action and reflection can occur rapidly or slowly. Spirals of learning can last for split seconds, hours, months or eons and often pass through my experiential body without conscious awareness. Presentational, propositional and practical cycles of knowing bring about full awareness of experience. As I expand creative engagement to include others in a collective re-imagining and transformation of self, spirals become embedded within spirals in a rippled or fractal effect.

As I (Nika) recently led a storytelling workshop, I invited the group to pause after telling a story to their partner and, in silence, take in the experience and meaning of what was expressed. We stood in a meadow, in silence and sun as their stories arose from the weekend retreat's experiences on the trails and in the redwood forest. This invitation to reflect was one of the workshop moments that these activism-oriented participants found rare and profound. As we turned through the weekend's spiral of learning, the storytelling session provided an opportunity to presentationally process. Both the reflective pause and the dyad dialog that followed elicited sensemaking that carried into the remainder of the retreat. I continually notice how inquiry and reflection are often missing in methods typically used for decision-making and action-taking, and also how process elements are often judged as taking inordinate time. Introducing artful inquiry-based spirals of learning strengthens our comprehension, articulation and enactment of our desired future.

Returning to our question "*What kind of practice might bring people into full participation with both the realities of the present and the possibilities for the future?*", we next briefly outline our intended session.

The Studio of Life - Conference Experience

        The Studio of Life conference experience will take place in at least two frameworks: that of the 60 minute session itself and then extended into the larger learning space of the conference. In the session, we will artfully inquire into our spirals of experience, expression, theory and practice, as well as venturing into the imaginal experience of attending the 2112 International Transformative Learning Conference. We will briefly review the concepts of open studio, spirals of learning, and artful inquiry as well as facilitate several activities based on these theories.

        Within the walls of our conference session, we will introduce this process of studio construction and facilitate participants' practice, solo and in groups. Participants will be introduced to using a simple 4-step inquiry process:

1. Experience - Observe the Experience NOW
2. Expression - Move - Doodle - Sound - Write
3. Theorize - Report (share publicly)
4. Practice - Teaching (practice process and share in the conference)

        We invite and support participants to become *artful inquiry agents*, exploring their inner and outer experiences during the whole conference and make their artful inquiry data forms visible to other conference attendees at designated locations. We also will provide handouts and directions to encourage them to enroll other attendees as fellow *agents*.

Summary

        As artful players, scholar-practitioners and educators, we (Nika and Virginia) share a tacit understanding of the value of arts and the intentional construction of creative/reflective studio space as an appropriate place for inquiring into and taking action on the Great Work (Berry 1999). We find that artful inquiry combined with action research methodologies provide accessible transformative learning frameworks for establishing everyday personal and professional practices that foster mindfulness, transformation and ongoing learning. We see our conference contribution as an offering in service to re-engaging people with their artful selves, the land, each other, and to re-imagining a sustainable way of human life.

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Toward a More Perfect Union:
Helping Law Students Bridge Distinct Ways of Knowing

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Abstract
Our highly interactive session will explore ways to integrate rational and extrarational approaches in support of transformative learning within legal education. We will share unifying and holistic approaches that help to bridge cognitive, affective, somatic, relational, imaginative, and spiritual dimensions of adult learning, and discuss how these approaches might be valuable in other educational settings.

Calls for New Methods of Instruction in Legal Education

The Carnegie Report plainly calls for new methods of instruction that integrate "serious, comprehensive reflection" of background assumptions and habits of thinking so that law students develop the judgment and perspective essential for them to resolve complex real world problems as lawyers (Sullivan, Colby, Wegner, Bond & Schulman, 2007). Indeed, critical legal analysis and critical self-reflection are both important and complementary in educating skillful practitioners (Slocum, 2012; also Meek, 2011). Critical legal analysis trains students "how to *think* like a lawyer," while critical self-reflection teaches students "how to *be* a lawyer" by evoking active, persistent and careful consideration of previously unquestioned assumptions, beliefs, values and perspectives (Meek, 2011).

Despite the importance of both kinds of critical evaluation, legal educators are still largely reliant on the Langdellian model of teaching, a model premised on the notion that we can teach students to be effective lawyers by training them to "think like lawyers," and that we can do so with a nearly singular focus on training the analytical mind.[1] The goal has been to train lawyers to reason analytically without the cumbersome weight of emotions, personal judgments, or values to obscure clarity (Slocum, 2012).

Although the goal might be laudable, the ideal of a dispassionate "rational" mind untainted by emotions, values and personal biases is a fallacy based on an outdated view of the human brain (Siegel, 1999; also Fisher & Shapiro, 2005). "As modern research in neuroscience makes abundantly clear, the limbic region of the brain (the 'emotional' brain) is so intertwined with the cerebral cortex (the 'thinking' brain) that we literally cannot 'think' without its influence" (Slocum, 2012). The emotional brain is an integral partner with the thinking brain in the way that we reason and problem-solve, and it is essential to the formation of our values and to the exercise of good judgment, discernment, professionalism and effective interpersonal skills (Bechara, 2000; also Siegel, 1999).

While recognizing the importance of the emotional brain to effective lawyering, if left unexamined and unchallenged, the emotional brain's inherent biases and pre-conscious agendas can undermine the clarity of our thinking and offer up tainted rationalizations and justifications that appease the thinking brain's need for logic. This

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[1] Christopher C. Langdell, Dean of Harvard University Law School in 1870, has been credited with the advent of our American legal education system. Langdell "viewed legal training as a process of learning how to synthesize rules by dissecting cases, a process that was distinctly scientific and did not require input from humanistic disciplines." Krannich, Holbrook & McAdams (2009). In the Carnegie Report, the authors contend that legal education inadequately prepares students for legal practice by relying "upon a single, heavily academic pedagogy, the case-dialogue method," which emphasizes abstract analytical reasoning (Sullivan, Colby, Wegner, Bond & Schulman, 2007).

is because the emotional brain is both (1) overly simplistic in how it views the world (black/white; right/wrong; good/bad), and (2) self-confirming (discounting evidence that suggests our initial instincts might be wrong, and over-emphasizing "evidence" that proves we are right).

Challenging these inherent biases and pre-conscious agendas requires a new teaching paradigm in the context of legal education – from a model relying almost exclusively on rational thinking and rational self-reflection, to a model that connects law students to their emotions and their hearts, fosters a practice of critical self-reflection, and bridges distinct ways of knowing (e.g. cognitive, affective, somatic, relational, imaginative, and spiritual). We believe it is through the combination of both critical analysis and critical self-reflection, each taught as "content neutral" tools (Meek, 2011), that law students develop the means to more skillfully adapt in self-generative, self-directed, and self-corrective ways as legal professionals. As educators inspired by transformative learning models, we seek to instill among our law students a practice of challenging their own assumptions and biases, a deeper awareness of the subjective filters through which they see the world, and new constructs for meaning-making that promote linkage among, and integration of, the many differentiated aspects of self and experience (Siegel, 2012).

Applications of Transformative Learning Theory

Meek (2011) has argued that legal education is primed for the application of transformative learning theory, especially in two areas: (1) the differentiation and integration of knowledge types for a complete mastery of skills relevant to contemporary legal practice; and (2) the use of content, process and premise reflection to transform habits of mind and the ways law students see themselves and the world. He has proposed a framework for critical self-reflection in legal education that focuses on "viewing" — a certain quality of observation (Meek, 2011). Both mechanism of action and developmental process (see Shapiro & Carlson, 2009), "viewing" engages mindful awareness across the individual-to-social continuum (Cranton, 2006), the three types of knowledge (Mezirow, 1991), and content, process and premise reflection (Cranton, 2006) to shift perspective and cultivate emancipatory learning. It recognizes "uncritically accepted and unjust dominant ideologies" and "socio-cultural distortions" to identify hegemonic assumptions (Brookfield, 2000). And it encompasses a range of extrarational approaches to help students step beyond the cognitive to embrace "a holistic, whole-person understanding" of themselves and others (Cranton, 2006). Moreover, it arises generatively and most potently through relationships within a social field — notably, through discourse with others (Mezirow, 2000) and within a quality of presence (Scharmer, 2007) that injects both "intentionality and trajectory … to keep the exploration headed toward a destination worth achieving" (Palmer & Zajonc, 2010).

We integrate both critical analysis and critical self-reflection within "viewing" — the lens through which one dispassionately observes his or her external and internal experiences, akin to mindfulness. Our students participate in activities specifically designed to cultivate this lens — role plays, online simulations, case studies, small group and dyadic debriefs, listening workshops, journaling, contemplative practices, artistic expression, and somatic exercises — and gain exposure to multiple learning modalities to reveal and also challenge their styles and preferences. This approach considers social norms, cultural expectations, language, personalities and somatotypes, morality, ethics, and worldview, which encourages a developmental process to unfold (Meek, 2011). Class discussions draw upon content, process and premise reflection to help students differentiate perspectives and skills while simultaneously integrating toward a new understanding that is more inclusive of relationships and the whole.

Intention and Focus of Our Presentation

In our highly experiential presentation, we will conduct a mock class demonstrating some of the approaches that we have used to foster and advance critical self-reflection as well as encourage the processes of individuation and integration among our law students. These exercises develop students' awareness of their own emotions and the links among their underlying needs, thoughts, emotions and bodily sensations. The first exercise introduces the concept of mindfulness, inviting participants to quiet their minds by focusing on their breathing, then to move their attention to the emotions they are experiencing in that moment, and then to link their emotions to concrete underlying needs that are either being satisfied in the moment, or not. The second exercise uses a practice developed by Siegel (2012) to distinguish the many different things that can be known: senses that bring in the outside world, the felt experience of the body, our mental activities, our connections to others, and our awareness itself. This practice also reveals the nature of cognitive processes, inviting participants to notice their thoughts, then to accept them fully for the moment, and then to observe with curiosity the very architecture of how their mental activities actually unfold. We will facilitate both a small-group and a large group discussion of how these practices help to foster emotional self-awareness and mindfulness, and, ultimately, deepen the capacity for presence, empathy

and a more mature understanding of other people's underlying needs, interests and motivations, as well as one's own. By engaging in these exercises, participants will experience first-hand how such practices help to support integration of self and experience, as we begin to bridge distinct ways of knowing.

We will also model ways we help law students experience and appreciate (1) that the subjective "filter" through which they see the world is not objective reality, and (2) how the filter through which they see the world can not only undermine their efforts to be effective, creative problem-solvers, but can also generate misunderstandings and detrimental emotional reactions. We will use a multi-modal, two-part exercise to anchor this discussion: first, we will share a brief phrase and invite participants to respond to the phrase by writing a few sentences that would complete the "story"; and second, we will invite participants to actively listen to a short clip of music while prompting them to notice their thoughts, emotions and bodily sensations. These exercises are designed to help students appreciate how vastly different their various responses were, and how their responses were shaped by their own past experiences and biases. As we de-brief the exercise, we will facilitate a discussion of how the "cognitive operators" in our brains constantly "fill in the blanks" by creating coherent stories that are products of our past experiences and biases, often resulting in inaccurate assumptions. The discussion of these exercises are designed to cultivate a deeper awareness of the filters through which we "see" the world, and some of the habitual patterns that shape the lens through which we interpret what we see.

We will conclude our presentation by engaging participants in a discussion of the ways in which these approaches might be valuable in other educational settings.

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The Role of Conflict for Transformative Learning: Insights from Conflict Transformation Pedagogy

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Abstract
Conflict transformation can inform transformative learning, particularly in its attention to how conflict can inspire learning toward personal-systemic change. Yet engaging conflict in the classroom can also introduce dilemmas. Based on a qualitative study, I discuss the dilemma of how educators who engage conflict toward transformation may unintentionally prioritize the learning needs of students who are more aligned with privilege.

Conflict transformation (CT) and transformative learning (TL) share significant insights about what forms of pedagogy support transformation. The overlap is particularly notable in the branch of TL named social emancipatory (Taylor, 2008) where educators prioritize the urgent need to generate energy for changes on the intermingling personal, social, environmental, and systemic levels (O'Sullivan, Morrell, & O'Connor, 2002). Even given their substantial overlap, the insights of CT educators are rarely brought into dialogue with TL educators (see Fetherston & Kelly, 2007; Meeker, 2012 for exceptions).

In this paper I review the working assumptions of CT pedagogy, focusing on how CT understands conflict as holding a catalytic energy to ignite learning and foster personal-social change. Next, I discuss a dilemma of praxis emerging from an inquiry with educators who hold a CT lens, namely an unintended tendency to teach toward privilege. My hope is an attention to this dilemma may inform TL educators, and also illustrate how further interaction between TL and CT educators would be fruitful.

An introduction to conflict transformation

While a full review of conflict transformation (CT) is beyond the scope of this paper, I will introduce a handful of working assumptions of CT which are particularly relevant to learning toward transformation. CT departs from the larger field of conflict resolution in several significant ways. The dominant forms of conflict resolution seek to resolve conflicts—blunting the potential of conflicts to inspire transformative learning and change. In contrast, CT educators seek to; reclaim the value of conflict, recognize the relational and situated dimensions of conflict, expand a view of time, and enact elicitive responses to conflict.

First, educators who facilitate learning utilizing a lens of CT do not aim to solve or end conflict, but rather seek processes that invite a change in orientation toward conflict in ways that may ignite transformation (Galtung, 2004). This orientation requires destabilizing a stubborn inheritance in Western cultures that frames conflict and its accompanying emotions as negative and as best avoided or resolved. Instead, CT considers conflicts as unavoidable differences that matter and as catalysts for learning and change (LeBaron, 2003). Educators who seek transformative learning are thus encouraged to stay with conflict long enough for renewed interpretations and expanded options of response to emerge (Lederach, 2003; Mayer, 2009).

Second, the CT lens claims that conflicts are relational and situated. In the frame of CT, conflicts are considered fundamentally social and cultural constructions, and their meaning is seen as emerging from the accumulated experience and knowledge held by those in conflict (Lederach, 1995). While conflicts emerging in the classroom may appear to be confined to personal or interpersonal levels, CT educators help foster the goal of Paulo Freire's conscientization, which Lederach translates as an on-going "awareness of self in context" (p. 19). Thus conflicts in the social space of the classroom provide unsettling opportunities for students to not only reconsider their own common sense interpretations, but also to deepen an awareness of self in relationship to the learning community and in relationship to a situated whole, which can provide the yeast to recognize one's capacity to participate in transformative learning and personal-systemic change.

Along with reclaiming the value and the embedded nature of conflict, CT educators also depart from hegemonic notions of conflict education by holding an expanded view of time. The dominant forms of conflict resolution focus on de-escalating conflict, suggesting that the short term urgency of a presenting conflict takes precedence over the long term possibility of change. Yet because CT centers issues of social justice, educators holding this lens acknowledge that visible episodes of conflict are often manifestations of historically rooted causes

of conflict involving power asymmetries which have been normalized over time, such as racism (Chene, 2008). Remaining mindful of both the entrenched understandings of what is considered normal (or dominant) suggests the necessity of attending to the accumulated past along with an eye on the horizon of the possible. Educators and learners are thus encouraged to consider how a broader context may be at work when conflicts occur in class—how stories of conflict originating from beyond the room may be involved.

Finally, educators informed by CT refrain from prescriptive responses to conflict which are the hallmark of more dominant notions of conflict education. In the classroom, this translates into the need for elicitive pedagogy where educators support transformation from below, relying on interpretations from those most impacted by a conflict situation. The classroom can thus be considered a creative learning space where students practice acknowledging conflict and discomfort as a signal for the opportunity of learning.

Folding insights from CT into pedagogy is fruitful yet challenging work. For example, transformative education that centers social justice can reveal investments in injustice embedded in our ideas, identities, and emotions. Destabilizing and transforming these investments "is not an easy, rational straightforward process, and pretending otherwise can contribute to additional forms of oppression" (Kumashiro, 2001, p. 8). In light of these significant challenges, I will discuss a dilemma that emerged as significant for participants in my inquiry.

Methods

This paper relies on insights from a larger qualitative inquiry on the role of conflict and emotion when learning toward social justice. As an educator of peace and conflict studies for over two decades, I continually learn from the enlivening conversations I have with my colleagues on their teaching praxis. My goal is to make their insights available to larger audiences of educators.

I interviewed 14 seasoned educators of adult learners who are informed by a CT lens and who teach or facilitate multicultural trainings with adult learners in the United States. Using open ended interviews, I asked educators to reflect on their concrete teaching practices, focusing on when conflicts and their accompanying emotions are encountered in the classroom.

After the first set of interviews, I sent each educator the transcript of their interview, along with a summary of the dilemmas that emerged as significant from the interviews as a whole. Next, I organized several small group dialogues with the coparticipants as a type of temporary space for collaborative interpretation. I chose to focus on the dilemmas of the educators because the coparticipants consistently stated an interest in how their colleagues approach the challenges of pedagogy. Fore fronting their dilemmas of praxis thus enhanced the possibility that the inquiry is useful for the coparticipants (Weis & Fine, 2004). I will next review one of the most salient dilemmas for the coparticipants—the dilemma of teaching toward privilege.

The dilemma of teaching toward privilege

One dilemma of practice the coparticipants raised is a tendency to unintentionally prioritize the learning of the privileged. Teaching toward privilege for those who hold a transformative lens holds a distinct meaning from mainstream educators, and does not equate with helping students adapt and excel within the status quo. Instead, the dilemma of teaching toward privilege for educators who seek transformation suggests the need for educators to practice reflexive attention to avoid unintentionally centering the *learning needs* of students who are more aligned with privilege. In short, the participants stress the significance of remaining mindful of who benefits most from their *process* of pedagogy.

The coparticipants acknowledge that the learning needs of all students are uneven. As educator Hanna (all coparticipants have been given pseudonyms) articulates, diverse learning needs are indicative of any group of learners:

We are not the same. <right> In every single way. You know I mean not just what music we like but power and privilege positions. So why wouldn't we—in our learning styles and the way we handle emotions—why wouldn't we be processing and digesting learning [differently]?

Yet the participants also agree that students' uneven relationship to privilege remains crucial for educators to attend to, particularly for educators who highlight the importance of disorientation, discomfort, or staying with conflict to promote transformation. Without explicit attention regarding whom the pedagogy centers, participants note that students who are either more aligned with privilege or who have been taught to support the privilege of others are more likely to be destabilized when confronting issues of inequality, and thus are more likely to have their learning needs prioritized. The uneven learning needs of students present a pedagogical dilemma when approaching discussions of inequality.

Seeking to raise the consciousness of students by destabilizing their privilege is familiar when teaching toward social justice. Yet students who have life experiences infused with marginalization are often either already aware of the impact of inequality or express a greater urgency to understand the *implications* of these constraints.

For example, one coparticipant Hanna reflects on an activity she facilitates surrounding environmental justice and poverty which intends to illustrate how industrial pollution disproportionately impacts people of color and the poor. Hanna suggests that this activity can lead to an "aha moment" for upper middle class and white students—"but it is not an aha" for students from communities who are more likely to be poisoned. This contrast leads Hanna to raise a question:

And so how do I design the curriculum so there is learning for [those targeted by oppression] instead of just *watching* other people learn *about* them? And in effect discuss *them*. And then they're in a place—just like queer people who have to decide if they want to be out—do I engage in this discussion as if I'm one of them? [Who] are being talked about? Or [as] I'm one of the people studying people like me?

A second example illustrates how students of color may also be asked to watch others learn about them in ways that don't prioritize their learning needs. One participant recounts a statement of an African American student about why the student "hates small groups," particularly when the dialogue centers issues of racism: "Every time I get in a small group I'm the only African American woman. And I have to *explain* so much, and I end up being, you know, especially in these classes where we're looking at these kinds of issues—I have to explain so much and I get *tired* of explaining."

The recognition that educators may inadvertently ask students of color to describe their life experiences to fill in the gaps of knowledge for white students was echoed by Ellen. In her graduate research, Ellen analyzed the experiences of peace and conflict practitioners of color who facilitate intercultural dialogues. She became aware that students of color were often asked to be vulnerable and express their life experiences related to race, which prioritized the learning needs of the white students. Ellen, who identifies as a person of color, found this awareness as an "awakening for her":

One of the participants said something at the end that was really profound for me, that again sparked this desire to do more research on the paradigms that we use and the assumptions we make about the model of dialogue.
(...)
It was really profound about how she felt she—that the dialogue process had asked her to kind of parade around her pain for the benefit of the white students. <huh> And that she didn't mind doing it, because she realized how important it was for the white students, but she didn't really gain anything from it, and in fact it kind of re-traumatized her.

While Ellen's participant suggests "she didn't mind" to "parade around her pain for the benefit of the white students," Ellen remains troubled by the ethics of using students from marginalized subject positions as either the content for other students' learning or further positioning them as witnesses to other students' learning.

Alternatives to teaching toward privilege

Hanna's question of how to structure pedagogy so that "so there is learning for [those targeted by oppression] instead of just *watching* other people learn *about* them?" deserves on-going attention from educators who seek to offer learning opportunities for all of their students. The participants in the inquiry came up with creative alternatives, two which I will highlight below; diversifying the pace of pedagogy, and considering strategies where students are destabilized together.

The pace of pedagogy

One strategy Hanna suggests to avoid teaching toward privilege is to structure courses in ways that allows students to move at multiple paces. Recognizing that the learning needs of students are uneven, the coparticipants note that one pace is unlikely to match the learning needs of all students. As Hanna suggests, instead of accepting the "default mode" of working at the pace of the privileged, educators can diversifying the pace of pedagogy:

We need to think of structures that allow people to move at a different pace. And look at the risks and the drawbacks of asking people to move at the same pace. And make sure that we make a conscious decision about who that's geared toward.

In order to support an awareness of the importance of pace to the learning process, Hanna normalizes this idea up front in her courses. She states:

So it's to normalize that, and again to say... "I might not be leading it at the pace that works for everyone. Right now, we're going to work at the pace of, you know, the group that's zooming along. And next class, or next activity, we're going to work at this pace." So have them *expect* that it's normal to have this happen.

Also in relationship to the pace of pedagogy, Ramiro stresses the need to "slow up"—to pay attention to where the group is in contrast to sticking to a preconceived teaching agenda or timeline. For example, he reflects:

I think this is where creative intercultural facilitation comes in. <m hmm> Let's say you get a room full of people… so and so says, "Man my eyes are opened" and so and so says, "Man, whatever identity I had I just lost it." I mean, what are you going to do?

What you *do* do is, one thing you can do—again, depending on circumstance and how many people are in the room and time and stuff like that—what I do is I slow up.

For Ramiro at the heart of "slowing up" is listening—following the energy of the students and creating the space to hear and take seriously diverse interpretations of what is happening—which helps open the possibility of making deeper sense of divergent responses in the class. In this way, the creative discomfort accompanying conflict is not confined to individualized experiences. Discomfort becomes a signal that learning is afoot, and students' emotional responses are taken seriously not merely as individual possessions but as woven into identities, habits of interpretations, and wider structures— making their emotions available for collaborative, compassionate interpretations.

Destabilizing the group as a whole

A second strategy participants suggest to avoid teaching toward privilege is to create moments in class where all students are destabilized. For example, Ramiro and Sage suggest creative opportunities for students to consider how all students have experienced marginalization through no fault of their own.

Ramiro discusses how he gives all students the chance to speak of ways that "they have been harmed" before he teaches content that stretches them too far beyond their comfort, such as institutionalized oppression:

I do have people reflect on their hurt—how they were hurt by no fault of their own… I want to make one point that everyone in this room without exception has been oppressed and hurt. And, and by the time I take them through the exercise, nobody argues with me. <yeah >

And so I learned to combine exercises with reflection and content. And not teach some content until I felt they were ready to hear it. With the most chance of understanding it.

Sage extends Ramiro's suggestion by using a story telling exercise to "theorize and problematize" how student come to consciousness of their subject positions and privileges:

Far enough into the semester where students feel a little bit safe—I'll often ask them to tell one story [about] the moment they knew their race, class, or gender. And use that to theorize and problematize the material.

Usually what they'll tell you is a story of, uh, *de-privilege* <m hmm> You know, [instead of] "I thought I was a male when I had all this privilege," [they'll say] "Well I'll tell you I thought I was a girl the day that I *couldn't* do x." <yeah, right> That is *always* the types of stories they tell. <uh huh> And then you can work with that.

Through Sage's activity, students share a felt knowledge of how it is often easier to recognize (and to not assume) the parts of one's identity that are not structurally affirmed. Being aware of a tendency to attend to *de-privilege* when considering uneven distribution of power may guide students to consider how their multiple positions affect the stories they tell and the stories they avoid—thus impacting the knowledge they are likely to consider credible.

Ellen stretches Sage's exercise by asking participants to "draw an image" of students' "first reaction or interaction or realization of their racial background." In response, students create images ranging from abstract to detailed images. Afterwards, Ellen asks students to do an "art walk, just to look at what people created," and she subsequently facilitates a dialogue based on their observations. In this way, all students are likely to be a bit destabilized, and students of color are not required to discursively retell their stories for the benefit of others.

Concluding thoughts

Conflicts hold the potential to inspire greater attentiveness of what is at stake, which can; disrupt taken-for-granted concepts, call for a renewed sense of relationship, and open space to imagine compassionate responses. As both TL and CT educators understand, conflicts across difference are particularly rich moments that can inspire transformative learning. As bell hooks (1994) states, "Confronting one another across differences means that we must change how we learn; rather than fearing conflicts we have to find ways to use it as a catalyst for new thinking, for growth" (p. 113). Yet as coparticipants in the inquiry also understand, differences between students are embedded in wider power relationships, which can influence which students are positioned as a source of disruption, and correspondingly can impact whose learning needs are prioritized. The dilemma of teaching toward privilege illustrates the need for educators to remain reflexively aware to address the uneven learning needs of all of their students.

Finally, I'm confident that increased conversations across disciplinary divides, illustrated by educators holding TL and CT orientations, are critical to renew and deepen pedagogy. In a world of increasing inequality and fast approaching environmental limits, teaching toward transformation is an urgent yet challenging task. My hope is not to solve the dilemmas of teaching toward transformation, nor to offer prescriptive responses. Instead, I hope to harness the energy from the dilemmas involved in teaching toward more just, sustainable relationships, and to enliven the good work of educators who take on this important work.

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Transforming the Learning Space from "I" to "We" Through Movement, Music and Improvisation

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Abstract

There are many doorways to transformative learning. Group music/singing, dance/movement and improvisation require attending to the other(s), that has the potential to transform the energy and space in the room. This paper describes the theoretical underpinnings of our participatory session in which we engage participants in music, movement/dance, and improvisation to shift the sense of being an individual "I" in a learning space to a "we" that can spontaneously engage in harmony or discord through activities that require attending to others in the space. The experience is grounded in the theoretical discourses of transformative leaning and Alfred Schütz's (1971) notions of the I and We, and new notions of transformation from improvisation theorists.

Keywords

Whole-person learning, arts-based learning, space, improvisation

There are many different discourses of transformative learning (TL), both within and beyond the field of adult education. Many of these emphasize the individual from a largely rational perspective following Mezirow (1991), though some also emphasize social justice perspectives and the importance of transforming communities, from an ecological (O'Sullivan, 1999) or racial/ethnic social justice perspective (Abalos, 1998; Sheared et al, 2010). Authors in recent edited collections have expanded this discussion to include more holistic perspectives that deal with the role of emotions, spirituality, and event embodiment in exploring individualist perspectives (Fisher-Yoshida, Geller, & Schapiro, 2009; Mezirow & Taylor, 2009; Taylor & Cranton, 2012), and discourses beyond the field also include attention to consciousness studies (Schlitz, Vietan, & Amorak, 2007).   Nevertheless, many such discussions still approach TL from a modernist perspective that seems to have an end state in mind (a "transformed" individual who is more critically reflective on their assumptions). There is little exploration of what sort of doorways of transformation may be opened in a particular educational setting itself in trying to move individuals beyond the sense of "I" in the learning space, to more of a sense of "we" by attempting to shift the energy in the room and exploring the implications for TL. This is the purpose of this session.

More specifically, the purpose of this participatory session is to engage participants in music, movement/dance, and improvisation to shift the sense of being an individual "I" in a learning space to a "we" that can spontaneously engage in harmony or discord through activities that requires specifically attending to others in the space. Group music/singing, dance/movement and improvisation require attending to the other(s) that has the potential to transform the energy and space in the room. In alignment with the stated conference theme of "collaboratively re-imagin[ing] how individuals, institutions, and societies can learn new capacities and habits of being" (Meridian, 2012) we are particularly interested in offering experiences and discussing emerging theory and practice that creates a context for a shift from what Alfred Schütz described as a "thou" relationship to a "We-relationship", a relationship that can be fostered within a shared "community of space and time" (Schütz, 1971b, p. 30). Thus in what follows below we lay out the theoretical framework of Schütz, and some other related work on improvisation as it relates to adult education.

Schütz's Notion of I to We

The experiential explorations in our session draw on the earlier discourses of TL, but we also are grounded in some of the insights of Alfred Schütz (1971) and his description of the shift from a dualistic self or other orientation to a "we" orientation. The experience of the We-relationship, he argues, necessarily draws the attention from the "I" to the Other:

I know more of the other and he (sic) knows more of me than either of us knows of his (sic) own stream of consciousness. This present, common to both of us, is the pure sphere of the "We." … We participant …without an

act of reflection in the vivid simultaneity of the "We," whereas the I appears only after the reflective turning. …We cannot grasp our own acting in its actual present; we can seize only those past of our acts which have already gone by; but we experience other's acts in their vivid performance (Schütz, 1970, p. 167).

For Schütz, then, the We-relationship is pre-given, and perhaps even more accessible to the individual than the individual's experience of him- or her-self.

An example from a research study conducted by one of us (Meyer, 2009) serves to illustrate what Schütz is talking about. The research study focused on adults' experiences learning to improvise which is a highly social/relational experience. Participants related experiences that fit Schütz's conception. Over several months participants engaged in games modified from improvisational theater and eventually progressed to fully improvised scenes. As they improvised and learned together over time through what Schütz describes as "face-to-face" relationships, their experience of the Other shifted from a "Thou-relationship" to a "We-relationship." Wagner (1970) refers to this as "common involvement in a communicative common environment" (p.34). As they played, took risks, improvised and experimented with each other in real time, participants co-created a social space that enabled them to step out of their comfort zones and shift attention from concern for their individual performance to the shared success of the group. Participants in this study of group-improvisation also described increased experiences of freedom from judgment of others, flow, and transcendent experiences and a shift from a planning/product-orientation to a spontaneous/process orientation. As explained further elsewhere (Meyer, 2006), this shift may also be characterized as a shift from self-consciousness to self and Other- awareness, or what Schütz (1971) terms the "tuning-in" (p. 161).

While this has been discussed in greater depth in relation to adult education elsewhere (Meyer, 2009), this idea of a shift from self to other or to the notion of "we" has also been implied some adult education discussions. Yorks and Kasl (2002), for example, theorize a related notion of intersubjectivity in adult learning with their conception of "learning-within-relationship, a process in which persons strive to become engaged with both their own whole-person knowing and the whole-person knowing of their fellow learners" (p. 185). Such whole-person knowing supports experiences that invite participants to transcend their familiar notion of self and allow the possibility of what Montuori (2003) has described as improvisational experiences that draw on all our knowledge and personal experience, and focus it on the very moment we are living in, in that very context.…It requires, and at its best elicits, a social virtuosity which reflects our state of mind, our perception of who and where we are and a willingness to take risks, to let go of the safety of the ready-made, the already written, and to think, create, and "write" on the spot. (p. 244)

In essence, in this session then, we want learners to "think, create, and 'write' on the spot" in an attempt to shift from the "I" to the "we", to explore what it will mean for transformative learning. In particular, we hope to test and explore the validity and value of this experience together in our session through shared music-making, dance and improvisation. As we experience and explore the individual experience of the shift from "I" to "we" (if and how it happens), we will also pay attention to our experience of the quality of the shared space, ways in which our individual and collective capacity is impacted, and can create new doorways for transformation. Are we, for example, more mindful, interconnected and courageous in a we-relationship than only in relationship with ourselves? Are there other capacities that are enhanced or diminished when we collectively shift into we-relationships? Do some participants feel that they have shifted to this sense of "we", while others feel that they remain in the context of "I" as we experiment with this notion of music, movement, and improvisation? If so, we will attempt to explore how and why, by drawing not only on the insights of Schütz, but also on those in adult education and improvisation who have written about the notion of improvisational music and movement.

Adult Education, Improvisation, and Music

Collaborative and arts-based strategies such as improvisation help foster the "social virtuosity" described by Montuori (2003) while also inviting a shift in consciousness. This shift is of particular interest for those interested in the social justice implications of transformative learning in adult education. Olson (2005) discusses this in some detail in describing how music for community adult education can be used in emancipatory education and transformative learning. In particular he notes that transformative learning more often happens at the individual level, but that when groups engage in music as part of their own cultural experience to claim their cultural identity or to facilitate an understanding across culture it can be used for emancipatory learning. In essence he argues that

community music-making can be used to promote collective consciousness and potentially social action. While he doesn't talk about moving from the "I" to the "we" in the same sense as Schütz, his discussion of collective consciousness is in fact a form of "we-ness". Further he also touches on the notion of improvisation, and makes a distinction between classical musicians and community musicians noting that "many community music makers delight in the flexible creative process of improvisation and collaborative composition" (p. 59).

In a similar vein, Sussman and Kossak (2011) have recently discussed the role of improvisational music and movement as a way of meditation that leads one to the "inner life" and go on to consider the implications for adult education. They argue that while improvisational music and meditation may seem quite different from each other on the surface, they share some common features as gateways to self-reflection "that may never be found through the language of concepts and ideas, nor through knowledge of the workings of the outer world" (p. 55). Both meditation and improvisational music "point us toward the transformative experiences of inner realization, which is a distinct feature of sacred wisdom in many cultures." While they focus primarily on the transformation of the individual and not the "we" in their focus on the inner life, they site the 13th century Sufi poet Rumi who seems in this quote to connect to "he we". Specifically, they cite Rumi's words: "Out beyond ideas of rightdoing and wrongdoing, there is a field. I'll meet you there. When the soul lies down in that grass, the world is too full to talk about language" (as cited in Sussman & Kossak, 2011, p. 56). While one could write an entire paper simply on what Rumi might mean, Sussman and Kossak seem to be suggesting through Rumi, that when one gets into altered states of consciousness brought on by improvisational music or meditation, one meets not only oneself but "the other" in that field that is too full to talk about language. Hence, in the deepest reaches of the self, the other is present, and the self and the other become "we" in the deepest of ways.

This is a point information scientist and organizational theorist Ciborra seems to be making when he suggests that improvisation be understood as a special case of situated action. It helps the "actor" transcend the constraints of the self for a deeper, expanded awareness and "attunement," and he states:

Only by bringing back into the picture the situation of the actor, those fleeting personal circumstances (captured by the term *mood*), and not only the emerging environmental circumstances, that we may get to a fresh understanding of improvisation … The way we *care* about the world unfolds according to the passing mood that attunes us with the situation (2002, p. 5).

This sense of "attunement" then helps people to transcend their boundaries of self at the same time that they sometimes go to their deepest selves.

Implications for Workshop Practice

It is with these ideas in mind that we create a workshop space that is intended to explore the experience of improvisation through music and movement that can potentially help people transcend from the I to the We. From a variety of perspectives each of the theorists and researchers highlighted above describe in refreshing terms and opportunity to shift from the individuated notion of self most often assumed in the TL literature to one in which the "we" and our experience of mutuality are central. Schütz's description of "mutual tuning-in" (1971), and Montuori's notion of "social virtuosity" (2002) are central here. So is Olsen's concept of how community music helps foster the collective, at the same time that, as Sussman and Kossak (2011) note, improvisational community music sometimes it takes singers/leaners to a deeper attunement with self and others. As Ciborra (2002) describes, improvisation can foster a state of consciousness or mood in which we "care about the world" differently (2002). These ideas invite us to explore a new dimension of transformative learning in which we attend and attune to our experience of the shift itself. Perhaps in the process of creating this space, we might discover Rumi's field beyond rightdoing and wrongdoing, and that is beyond language. In that discovery, we hope to meet you there.

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Parental (Not) Learning
Supportive and Obstructive Normalizing Practices and Transformative Learning

Ruth Michalek

Abstract

This study develops a grounded theory of parental learning processes. Using transformative learning theory, interviews with parents and parents' diaries were analysed focussing normalization. Normalising can help parents reduce complex situations, exclude significant areas from reflection and therefore from learning. But normalizing bears the risk of becoming a learning obstacle.

Introduction – Research – Classification

In their everyday life, parents face many challenging or problematic situations. They are confronted with pedagogical expectations like the education goal to prepare children for school and for their (performance-) requirements and to support their educational biography. Educational science literature consistently emphasizes parents' central meaning for their children (cf. Rupp/Smolka 2007, 326) and the hereby emerging significant responsibility that parents are facing (cf. bmfsfj 2006). Some studies explore "the range of challenges and difficulties faced by parents" (Bloomfield/Kendall et al. 2005) but we know little about how parents manage their everyday life as a parent or rather how they learn to be a parent (cf. Demick 2006).

At the same time, a number of studies suggest that parents are learning without these investigating parental learning in more detail. Tschöpe-Scheffler (2005) for example reconstructs central factors of a successful parenthood and compares prominent German parenting programs. This perspective suggests that parenthood is being learned and can be learned. Learning is also suggested by studies, which discuss parental acquisition of skills, the way of helping people to help themselves or transition to parenthood. From transition research we know factors that contribute to an effective transition to successful parenthood (cf. Fthenakis et al. 2002). So far I have only found one research perspective that explicitly asks for parental learning. Studies focus on the parent-children-interaction. Demick (2006) reviews "empirical attempts to categorize the role of the child in adult development and learning" (330) – such as children's questions can lead to parents considering worldviews or gaining more cognitive flexibility. He states that more empirical research and theory development is needed. Finally, in generation research there are a significant number of studies, which address for example identity concepts. However, none of these studies relates to theories about parental learning and the corresponding research. If a learning concept is used, then the learning process itself is barely reconstructed in more detail.

Already in the end of the 1970s Mollenhauer wonders – and he could still wonder today – why there is no pedagogic theory about education in the family. A theory about parents' learning processes in this context can be seen as part of such a theory on family education. Mollenhauer suggest that a family education theory based on experience should lead pedagogic action. This means that pedagogic interventions in a family should be linked to the forms and contents of learning processes. In the study I present in this paper, I investigate on the one hand *what* parents learn, and on the other hand *how* parents learn.

Based on illustrating data, results present how normalizations that are postulated by parents are linked to the learning of parents. Presenting some results in this paper I first will illustrate how performed normalizations frame learning. Then I outline how normalization is newly framed to solve a dilemma and how in the course of this, frames of reference are transformed. Following this, I illustrate how normalization is questioned and thus frames can be transformed. Finally, sometimes learning seems impossible or unnecessary because of normalization. Finally, I will discuss possible functions normalizing could bear upon parental learning.

Theoretical Framework, Methodology and Methods

Starting point of my investigations was Dewey's (1938) pragmatist learning concept, according to which learning is possible where problems in action are perceived and accepted. If parents take note of aspects in their relationship with the environment as problems, then learning can take place. In this case learning processes are parents' activities and their search for solutions. I reconstruct parents' learning in the everyday in the German society developing a Grounded Theory (cf. Corbin/Strauss [3]2008). At this I follow Felden's (2008, 121f) estimation that biographical learning can be identified by means of autobiographical self-presentation. Successively, 27 semi-structured narrative interviews with mothers and fathers have been conducted and analyzed according to Grounded Theory Methodology (GTM). Added to this are four diaries that have been kept by parents. In each case the parents kept their diary over a period of several years.

Although Beck already in 1994 set up the thesis that "normal biographies" or "normal families" no longer existed as points of reference, the analysis of the first interviews showed very soon that normalization of issues was a recurring concept.

Firstly, I clarify when in the language of the data something is "normal" or "normalized". A first hint for normalization/normalizing can be found when something is explicitly called "normal". Furthermore, in German spoken language the words "natural" or "naturally" also refer to a normal situation or to normalization. In a slightly weakened form normalizations can be found when an interviewed person switches from the first person singular to a more generalized form of "one" or "you". Here, a personal statement is generalized and thus put in the generalized context of normalization.

I call the attribution of normalization, which an interviewed person uses, as „normalizing". The content, which is in this way classified as being normal, is called „normalization".

At this point of my research I added Jack Mezirow's (1991) theory of transformative learning to enrich my theoretical perspective. Adding theory corresponds to GTM, according to which the data's structure determines the development of theory. Consulted theories are always used for a more differentiated description of the aspects that have been found in the data. Hence, the theory of transformative leaning is meant to complement Dewey's pragmatism as heuristic for data analysis to enable a differentiated reconstruction and description of parental learning with a specific view on the learning of meanings.

I will shortly outline Mezirow's learning concept. Mezirow (1991, 5), like Dewey, sees learning as a process, in which preceding interpretations of an experience's meaning are used to construct modified or new interpretations, which can then, in their turn, guide future actions. Learning is a process of problem solving. The solution can be achieved by either defining a problem or by redefining or reframing the problem. To interpret and judge the meaning of an experience is central in parental learning.

Mezirow assumes that our perception is guided by assumptions, which he calls "frames of reference" (Mezirow 2000, 16). Frames of reference are fundamental epistemologies. They appear in two dimensions: habits of mind and points of view. Habits of mind are sets of assumptions that provide a very rough frame of orientation, which again is determined more specifically for the perception and interpretation of a concrete experience. Habits of mind can represent shared beliefs and expectations ("shared as paradigms", Mezirow 2000, 20) or individual beliefs and expectations ("`highly individualistic'", ibid.). Habits of mind, which are generally rather unconscious, are expressed in points of view. In the form of concrete expectations, points of view lead actions and determine what we see and how we see things. They are rather consciously accessible and available via other people's feedback as habits of mind. While habits of mind thus describe the abstract structures of beliefs and expectations, which have developed from past experiences and which frame new experiences, the associated points of view refer to concrete beliefs and expectations (cf. Jarvis 2006, 82).

Frames of reference define the central conditions, according to which an experience's meaning is interpreted. They thus determine what and how people learn. At the same time they also determine, after which criteria a person judges or evaluates things. Furthermore, frames of reference affect how we imagine personality. They define our self-image and the way we see ourselves (cf. Mezirow 1997, 36f).

The main components of transformative learning are the critical reflection on assumptions or rather the critical self-image and validating the best reflective judgments in discourse. Transformation can be the result of inconsiderate assimilation as well as the result of repeated and rather affective interaction or the result of concentrated and attentive reflection (cf. Mezirow 2000, 21).

Results

Parents have to learn skills and points of view related to those skills – for example how to change a diaper. Existing points of view are differentiated by learning better "recipes" or by parents leaning new points of view about how to handle their child – like to use baby slings, which are good for the baby's hip formation. A significant part of these frames is learnt during everyday life, without parents actively reflecting on this. The same applies to normalizations. A matter is declared to be normal, without justifying this allocation. It remains unclear where, when and how parents have acquired these frames of reference. Interesting for this analysis is *how* these frames affect possible parental learning. What does it mean for parental learning, when something is seen as normal? At first sight one might state that: normal is what is being expected and where the usual action is based on. According to Dewey, if something is seen as normal, it doesn't confront and interrupt the undisturbed performed action. Then, how is it still possible that something is identified as being a problem with a reflection taking place leading to relearning or learning anew? How can learning processes occur in spite of normalization? The most evident situation is that parents observe any interrupted normal situation. If something

is not normal (like breastfeeding gets difficult), parents will try to recover normalization (take advice from a book and successfully prolong lactation). The perceived difference from normalization thus becomes the *origin of learning to recover the normal situation*. Data show further relations between normalizing and learning. This is what I want to explain in the following.

A normalization frames learning – Normalization as horizon

In my data, a young mother states that as a mother, she *naturally* has to take care for her daughter not to lack anything. For Mrs. WF[1] parental responsibility and care represent a central normalized habit of mind regarding parenthood, which is evident by many sequences in the interview. For example she tells about her being a very freedom-loving person, which is why she used to often change residence or spontaneously travel in the past. After having moved twice with the child, she realizes that after each house moving her daughter does not feel well. Corresponding to her normalized habit of mind concerning care, she has to learn to set back her own needs for freedom. She adapts parts of her previous lifestyle, in order to act according to the frame of her normalized habits of mind. She adjusts the points of view, also regarding her self-image as a mother. Normalization frames this learning.

Both examples have the following in common: the normalized assumptions, which have been introduced by the interviewed mothers, *create the horizon*, within which learning occurs for both the reflection and search for a solution as well as the solution itself. The assumptions themselves are not modified. This is why only such solutions of problems exist, which are consistent with the normalizations.

To newly frame an interrupted normalization

"Well, I was ALMOST totally responsible for education*as robert was away most of the time*and with his job he was anyways gone more often than a **normal** husband [LAUGHS] and*this*exhausted me in the beginning, having all the responsibility and then another woman*crossed my way, who was in the same situation as I was but her older children or children that had already moved out and then she said and this was what I liked a lot back then because it helped me a lot she found it great that she could raise the children alone and nobody was getting into her business*and I could agree with her and I thought, well, actually she is right, we have **one** has as partner **one** has different*styles of education and because I really almost had the children on my own I could – of course in consultation with robert just do it my own way and didn't always have somebody getting into my business*and that was when I had the conversation with mrs. müller, that was really great" (Interview 14, 11)[2]

In the beginning Mrs. LF describes herself in a constant problematic situation. Her husband's predominant absence is *not normal* for her. Apparently she can't recover the interrupted normalization, particularly the transgression of her idea that *normal men are only up to a certain degree away from their families* nor can she transform this normalized point of view. A consequence of the interrupted normalization is that she finds herself in a dilemma, namely that she has the full responsibility for the child. This seems to contradict her point of view '*parents share the responsibility for their child'*. Her parenthood differs from what she perceives as normal.

By coincidence Mrs. LF encounters another mother, who used to find herself in the same situation as Mrs. LF. This mother, however, *interprets her situation in another way*. For her being alone with the children was not an abnormal situation that lead to a lot of responsibility and excessive demands. On the contrary, in her situation as practically being a single mother she values the *freedom to act* that she obtains in this situation ("nobody getting into her business"). Mrs. LF encounters a completely new perspective on the same situation. She learns to take a new perspective regarding the dilemma. Hereby she refers to the normalized point of view '*parents can have different styles of education'* and develops the point of view '*being practically a single mother I obtain freedom to act'*. She thus puts another frame around the problematic situation and accordingly judges it in a different way. The feeling of burden is transformed in a feeling of discharge of otherwise necessary agreements and she transforms her points of view. She relearns.

In the telling, the change of horizon seems to lead to a significant modification of the judgment of the dilemma. Mrs. LF not only reflects on the dilemma's content. She also *refers to her basic premises*. It seems obvious that the modification of points of view also leads to a change of corresponding habits of mind. During those reflections Mrs. LF could have transformed the probably underlying habit of mind '*parents have to raise their child together'* to '*raising your children alone can be an asset'*. The relearning in this sequence not only leads to Mrs. LF putting up with the disturbed normalization. She also learns to interpret the deviation of

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[1] Interviewees are anonymized by letters.
[2] The translation from German trys to keep the wording. * signals short breaks, CAPITALS signal emphasis, **bold** signal normalizations.

normalization in a positive way. The disturbed normalization can thus continue to exist and still does not lead to a dilemma anymore. The interrupted normalization, however, initiated transformative learning.

Questioning a normalization – Discovering something new
If normalization is being questioned, it soon becomes the catalyst for parental learning.

"well, **one** also kind of gets to ones limits. for example there was this situation with that when they all shot around with little toy pistol bullets, […] in the first year I still could handle everything and just put the things AWAY in the garbage and return them to where they came from, and one year later they just came back. And then there were FOUR of them in the neighborhood, and they just played with each other. […] well, **naturally** I could have taken AWAY the weapon*and hope that he stays that it stays away" (Interview 01, 203)

For Mrs. AF it is *normal* that all parents get to their limits at one point. She tells about how in the first year she successfully stops her son's play with a toy pistol, which seems to represent a problem for her. The point of view '*I don't want my child to play with weapons'* is justified later on with her father's war experience. Throwing away or returning the pistols turns out to be a successful solution. However, the problem reappears one year later. But Mrs. AF does not apply the same successful strategy again.

"and hope that he stays that it stays away. Then **naturally** the question is, does HE not play anymore or do the TREE or four then play among each other and Lukas does not play with them ANY MORE. **One** also does not want to exclude him from the group,*or does he just do it secretly, which is what I would have expected from my son, […] and then it was just more important to me to*ehm*just further stay in contact, and then I just let them explain to me exactly, WHAT they are playing and HOW they are playing and so with my rules, which I had set up, I could also take a little influence in the play" (Interview 01, 203)

The mother's reflections show two points of view: '*normal parents don't want to exclude their child' and 'I want to be in contact with my child',* which contradict with her following point of view '*I don't want my son to play with weapons'.* She evaluates different possibilities and their consequences and finds a solution, which goes further than the normal repetition of the first strategy. Like this her *learning process is extended* across the frame that has been set by the normalization of the earlier solution.

Not learning by normalizing
Parents in all examples above are somehow stimulated to learn. However, there are a number of examples which show that no learning takes place or yet no solution has been found. The interviewed parents are stuck in a dead-end and according to their description no solution is imaginable. These sequences mainly deal with the parents' self-image and feelings.

The missing learning has two sides, which I differentiate conceptually. Normalizing can on the one hand *prevent learning* and on the other hand *dispense from learning*. Preventing (a) means that an actually helpful and necessary learning, which could help to fix a situation, does not take place or rather is made so difficult that it is not possible to learn yet. Normalization results in parents not finding a solution. Thus, the problem continues to exist and reappears continuously. On the contrary (b) I call examples dispensing, when further learning is obstructed but the learning obstacle does not entail an unsolved problem. The interviewees find a solution, which makes further reflection or intervention unnecessary and this is why no further learning is needed.

Normalizing prevents learning
In the following sequence the mother normalizes a strategy that she considers as the only one strategy possible for her. This strategy again and again brings her to her personal limits. A search for alternative solutions seems to be impossible due to the performed normalization. Hence, the mother is stuck in her returning dilemma.

„well I think I am pretty much a control freak and when I don't have control, this in principle makes me a little helpless first of all*when felix completely refuses to do something this is already such a limit where I then think how do you handle this now what do you have to do for example when he now by all means*we somehow live in such a former vineyard and our landlords have all these tractors standing there in the yard what **naturally** leads to a huge discussion every afternoon because he wants to sit on the tractor instead of walking up the stairs with me and ehm he knows very well that I can't carry him […] and this means that I have there in principle I am totally limited in my possibilities of action I can only convince him with reasoning to walk up the stairs with me*" (Interview 20, 313-314)

According to the self-description „control freak", situations in which Mrs. SF loses control pose a problem to her. Due to the tractors placed in the landlord's yard "naturally" the mother and son lead "huge discussion[s]": the son wants to "sit on the tractor" and she wants to "walk up the stairs". Mrs. SF normalizes

the point of view *discussing*. The use of the word "naturally" emphasizes how unavoidable the discussion is. Hence, it is not possible any more to look for alternative solutions. The normalized solution or rather the once acquired point of view '*daily discussions are normal in my situation*' prevents further learning. Normalizing the burdening solution retains the problem situation. Mrs. SF is caught in a *recurring normalized dilemma circle*.

Preventing transformative learning by normalizing can also be very helpful as the last example shows.

a.   Normalizing dispenses from learning
for me it was **normal** that nothing worked anymore*it is **NORMAL***that nothing works anymore, well it is not that **YOU** can't handle things anymore*it just needs all of **YOUR** attention*and it WILL COME*ehm don't worry about that **you** get nothing done, enjoy the time*with the child." (Interview 16, 160)

According to Mrs. NF a child needs so much attention that other necessary daily tasks can't be done. Mrs. NF would have the possibility, to counteract this situation (e.g. to get help). She would have to reflect on different strategies. But this is not necessary due to normalization. Once the point of view '*being a parent it is normal that many tasks remain unfinished*' has been learned, further learning – like differentiating skills – seems to be unnecessary. Normalization dispenses her from further learning. The problematic matter is declared to be normal. Normalizing is itself the solution to the dilemma.

In the data many examples like this can be found. As regards content, sequences about dispensing mainly affect two areas: the own self-image as a parent as well as feelings. In my data parents never normalize a positive connoted feeling (e.g. joy, gratefulness). Parents always normalize and thus dispense themselves from learning in those sequences, in which they have negatively connoted feelings like being stressed, insecure or afraid.

Normalizations regarding the parental self-image are the most frequent in the underlying data. Parents always describe a relatively clear defined field like certain tasks being normal for parents and by that withdraw this from any further reflection. Learning thus doesn't seem necessary any more in this field. This way parents reduce the complexity of their daily situations as a parent. They relieve themselves.

Hence, not-learning as a consequence of normalization shows two sides. On the one hand normalizing reduces the complexity of parenthood and helps parents to cope with all the new requirements and tasks. On the other hand normalizing can also lead to normalization being an obstacle for further learning. Normalizing can thus lead to both: it can dispense from learning and create relief or it can prevent necessary learning and create a dilemma circle.

Especially these last examples invite to take a closer look at what the functions of normalizing are.

b.   Functions of Normalizing
According to Waldenfels (1998), a German philosopher, normalizing can be understood as the answer to an unfamiliar experience. This seems to be the case for parents. They describe parenthood as a new, unknown or foreign situation.

"okay, so first of all I have to say that **one** imagines it very very different how it is going to be well **one** cannot imagine how it was then, except if **one** already has a child" (Interview 15, 9)
"during pregnancy **one** always wonders like oh can **one** handle this*did I really want this [LAUGHS] it changes EVERYTHING" (Interview 23, 25)

The idea of parenthood as a completely new and unknown experience runs through the data like a red thread. Thus normalizing can basically be interpreted as parents' reaction to the dilemma of perceived foreignness. Normalizing is a learnt *strategy to handle the foreignness of parenthood*. This can be further differentiated.

Studies continually point out parents' educational uncertainty and disorientation (cf. Minsel 2007). Often normalization seems to give parents some sort of *orientation*. When a de-normalization is discovered, normalization serves as a frame for judgment. Normalization can become the rule for complex situations. Often normalizing provides the framework for acting as a parent. Thus normalizations can be parents' attempt to maintain orientation in the plurality of possible meanings and views about parenthood.

When normalizing dispenses parents from learning, it leads to *relief*. Normalization can simplify Parents' often complex everyday life. The complex and possibly overwhelming requirements and expectations to raise children in a healthy and happy manner are reduced by excluding whole areas from reflection. What is normal doesn't have to be considered any further for the moment.

Data show that normalizations can also enable or even require learning. When problematic situations are normalized, this can facilitate parental learning. The problem does not represent individual failure any longer but rather a problem, which all parents have. This *protects the own self-image as a parent* and at the same time *the own problem receives less weight*, due to the generalization. Everybody has this problem and can handle it in some way.

Conspicuously often parents normalize a point of view or a feeling, which might be judged negatively by outsiders. Regarding points of view normalizing can thus be seen as *possibility to justify ignorance or inability*. The interviewed parents by normalizing seem to prevent any kind of critical request in advance. They ensure being normal parents although actions or feelings might be judged negatively. Normalizing thus can be a *resource-oriented strategy* regarding the handling of possible mistakes, lacks of knowledge and inability. Hence, a central function of normalizing seems to be *assuring oneself of the own normalization as a parent and thus to confirm the own self-image*.

Finally, normalizing can also result in a *consolidation of dilemmas*. This shows the problematic function of learning obstacles.

Conclusion

The above results implicate several important aspects concerning parent education and other learning research in the area of lifelong learning. As has been shown, normalizing (1) can be a valuable *resource* for parents. The reference to normality can provide parents with relief in complex and emotionally and physically overwhelming situations. According to my data this function seems to be very important, especially at the beginning of parenthood, when new requirements of the foreign parenthood are particularly high and intensive. The reference to normality can (2) *open up learning opportunities*, enabling parents to continuously develop further during their parenthood. Then however, normalizing (3) bears the risk of becoming a *learning obstacle* and thus to *limit parental learning opportunities*.

The knowledge about normalizing practices and their function also has implications for the development of parent education programs. The findings promote the *importance for parents to reflect on their notions of normality* concerning parenthood and their parenting practices.

Results show that parents normalize in situations where parenthood seems too complex and the need of self-assurance is high. With respect to further research, we ought to especially *consider those normalizing themes and situations more closely*. The study also suggests there are complex learning-challenges for parents from the onset. These *challenges seem to be indicated by normalizing*. A better knowledge about these situations in preparation for the tremendously important tasks of parenting could be a possible starting point for future parent education programs. Reflecting normalizations could open up new perspectives for additional possibilities for parental learning, in order to *extend parents' horizons*.

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Making a Difference: Exploring the Experiences of Transformational Women Leaders in Kenya and Singapore

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Abstract

Leadership has implicitly been couched as a male domain globally, begging the need for more studies to shed light on women leaders, particularly women of non-Western backgrounds. Two doctoral candidates examined and compared a sample of 6 women leaders from their research in Kenya and Singapore. The study found more similarities between these women leaders than dissimilarities, such as assuming a strong stand and conviction, being modest and authentic, ongoing informal learning and experimentation, valuing communication and leading through relationships, as they identified and intervened to tackle unmet social needs and neglected social problems. Dissimilarities between these women are also discussed.

Introduction

Dedicated to critical feminist commitment to create liberating spaces for marginalized voices and diverse realities (Collins, 2000; hooks, 1984), this exploratory paper focuses on women leaders beyond the white, western world, to capture the experiential learning of indigenous and local women who made a difference in their communities. The choice for these two countries is derived from the author's backgrounds. Kenya and Singapore share common historical context of British colonization and independence after World War II. While Singapore has become part of the first world, Kenya strives to break out of third-world conditions with recent progress on the economic, education and social indicators. Nevertheless, women from both countries have been affected by the dynamic global changes that impact the social, economic and cultural spheres within their countries.

Problem and Purpose

Leadership has generally been seen as a male domain and not considered a prime topic for research on women (Eagly and Carli, 2007). Research conducted on gender and leadership revealed the 'glass ceiling' or the cultural, social, economic and political barriers that women had to contend with in advancing to powerful positions. In spite of these barriers, empowered women influence and mobilize followers to make an impact for social change (Alston, 2005; Ngunjiri, 2010; Oyewumi, 2003). This exploratory paper examines how Kenyan and Singapore women, who work predominantly in the non-profit sector, exercise leadership through the following research questions:

1. What competencies do these women describe as critical to their leadership roles and how they learned them?
2. How do they take action and respond to their leadership challenges?

Conceptual Framework

Numerous theorists allude to the need for transformational leadership to drive learning, change and innovation to address complex challenges (Martin, 2010). In a meta-analysis of 45 research on transformational, transactional, and laissez-faire leadership styles, females were found to be more transformational in style than their male counterparts (Eagly, Johannesen-Schmidt & van Engen, 2003). However, it is unclear if the research included subjects from non-western cultures or the non-profit sector.

Transformational leaders exert an influence on their followers to collaborate in order to accomplish something unique and challenging (Bass & Avolio, 1994; Bass & Riggio, 2006). While transformative learning is instrumental for adaptation and problem-solving (Mezirow, 2000), transformational leaders facilitate the adaptive capacities and learning of individuals and groups to respond effectively to social challenges (Keohane, 2010). This leadership approach frames the leader as a dynamic change agent.

Further, embedded within gendered social, cultural and workplace structures, minority women must work from within the system as "tempered radicals" to challenge the status quo in order to alter the power dynamics

(Meyerson, 2001). These change agents have to be critically aware of the danger of exercising leadership by balancing the maintenance of their credibility within the system while "rocking the boat." The application of tempered radicals theory to study the informal learning of transformational women leaders will surface the contributions of these women as creators of knowledge (Marsick, 2001).

Methodology

The research questions are addressed using constructivist qualitative methodology that regards knowledge as social construction and aptly captures diverse local leadership experiences. For that reason, in-depth semi-structured interviews to gather rich descriptive data were conducted with three Kenyan and three Singapore women to understand their leadership enactments (Yin, 2009). The interviews were audio-taped, transcribed and coded to generate themes to answer the research questions.

Discussion of Findings

The co-authors coded the interviews of their respective sample of women leaders prior to contrasting two sets of themes to ensure objective comparison. Following is a brief background description of the two groups of women and how they took action and responded to their leadership challenges.

The Singapore Research Subjects

The Singapore research subjects are executive directors and predominantly founders of their non-profit organizations and social enterprise, engaged in social issues such as mental illness awareness, serving at-risk youths and children with learning disabilities. When they first intervened in their respective social spheres, the awareness and engagement of these issues were at its infancy in Singapore.

Starting out 'alone,' with meager funding, the women described the challenges "to get the work going" through building a volunteer base, developing trained staff, establishing organization credibility, networking with relevant institutions to gain access to the people they set out to help, as well as engaging external stakeholders for support. Initially they reached out by volunteering or "doing free work." After 6 to 12 years of field experience, the women have set up financially-stable organizations and are recognized for their expertise indicated in the invitations they received to give talks or trainings in their area of social issues.

Kenyan Women Leaders

The Kenyan participants for this study were purposively selected through personal recommendations snowballing and archival research on pioneer women leaders in Kenya. The women, all Kenyans by birth, are engaged in education, public health and entrepreneurship. They were chosen for their work in the community and the respect they command locally and globally. Collectively they have done a lot to improve human conditions going where others chose not to go while raising families and working to support their missions.

The women discussed concrete actions involved in growing their programs within their community. They described their path mainly in spiritual terms, as an ability to listen to their intuition; respect for others; the ability to remember every person has a story even though they may lack a concrete plan. Ubuntu, or deep spirituality factored significantly in their successful leadership missions. However, they acknowledged that change occurred slowly through a series of experiences that raised their awareness and conviction.

Competencies and Behaviors: Similarities

Upon review of the two sets of data, striking similarities in leadership competencies between the Kenyan and Singapore women emerged:

Passion and Commitment: All women reported having strong commitment and passion in their diverse efforts to better human condition. One Singaporean viewed the urgency in addressing a critical but neglected societal need, while another considered her work "almost like a call" from God that made her leave her medical practice. A Kenyan woman described ways women she works with overcame hardship and endurance through the best of human traits. Had she not decided to put considerable energies toward creating an organization to help these women, she said "I would have been denying myself the most noble human qualities within myself and others…I would have missed the opportunity to serve not only others but God."

Strong Stand and Conviction: The women's conviction in their work made them resilient in the face of difficulties and resistance. A Kenyan women expressed that "one of the secrets" of her success, "is not to let obstacles," insurmountable as they may be to stop her. For another, the challenge was like "fighting goliath or hurling myself off Mt. Kenya. But I chose to take the leap…it really goes against human nature to sort of throw yourself off the mountain and free fall to possibly your death, into this vast unknown." A Singapore leader likened her work to river water, if "it meets a rock it will still flow, form another path," while one other kept all the rejection letters from potential donors to deepen her conviction in her work. They merely highlight the gravity of the problem she has decided to tackle when corporations resist association with mental illness issue.

Perhaps by virtue of their strong convictions, these women demonstrated patience and determination in working the issues, "My intention is not to change the mindset of Singaporeans overnight.it will take some years to do so" and "when the door closes, the window might open."

Action-orientation: Another theme shared by both groups of women is their dedication to make things happen: The Kenyan women had concrete actions in nurturing their programs, family and community, one woman said, "I just do it and if it doesn't work, try a different way." A Singaporean shared the same sentiment, "I actually believe in just doing.and see where it goes, there's not much point talking especially if it brings you no where."

In the face of resistance, one quipped: "I just have to think a little more creatively what the next step is." Limited resources compelled a Singapore woman to be creative and "to explore all the different ways." Rather than giving formal talks, the first mental health carnival was organized to raise awareness in an environment of fun and exploration as a strategy to counter attitudes of fear and anxiety of mental illness. During the event she networked with a local politician to appropriate physical space to set up a Wellness Studio for free counseling, employment services, and training for recovering patients. The President of Singapore was invited to the opening event of her small non-profit organization, much to the disbelief and discouragement of friends and sub-sector colleagues. Her strategy to garner the President's support to give visibility to an unpopular issue worked, affirming her motto that "if you never try, you will never know".

Continuous Informal Learning: Through continuous informal learning, the women found hidden gaps in community needs. For example, from her conversations with several special needs schools and NGOs, a Singapore executive discovered that there is no provision of sexuality education for special needs children. She set up a collaborative effort with her sub-sector peers to design a curriculum for teacher training. Another executive was sponsored by the local university to attend Mental Health first-aid training to teach others early signs and symptoms of mental disorder and how to handle crisis. She used the knowledge to expand her work to provide training for government and non-profit organizations as well as free consultation for those who cannot afford.

A Kenyan leader recounted attending a family planning meeting in NYC, the discussion was on how to "help" Kenya curb the population growth. One solution was to send banned U.S. contraceptives to Kenya. The Kenyan leader said, "I remember questioning how come it is that what was banned in the U.S. but good for Kenyan women. Many of those in attendance did not think I could have known this fact for that I say to you keep yourself informed in the causes you might be interested in." The contraceptives were never sent to Kenya because of her provocative inquiry. Learning for this woman is incidental and informal and served to strengthen her intervention. Continuous, informal learning for these women leaders stems from their deep commitment to their work and their connection to those they advocate for.

Communication and Connection: Leading through Relationships. The women have a strong connection to their community and people. They consider active listening to their subordinates important, as expressed by a Kenyan woman, "I would say the primary [characteristic] is being able to listen… When you just listen to people you learn to appreciate different points of view and I think that is really good."

Most women credited their staff for organization achievement, as illustrated in a Kenyan woman's words that "I did it with other people not alone" and "If my staff come to me with an issue I just "throw" it back…and ask how should we fix it." Open communication is considered by one Singapore executive as an important leadership behavior, "I communicate very openly with (my staff) what are the challenges, the successes, the issues, why do I make these decisions and it takes a lot of time and energy…if I made a mistake I tell them it is my fault." Another Singapore leader continued to reach out to diverse institutions and stakeholders to expand her work and always kept

her "door" or communication channel open even when the other party resisted, saying that "I always see the opportunities to collaborate, in every way".

Modesty and Authenticity: The women displayed modesty as leaders and did not credit themselves with personal leadership prowess and success. A Kenyan leader shared that "no one trained me to be a leader.. something needed to be done and..we did it together." Another pondered, "it was kind of funny, I don't always look at myself as a leader."

When asked what makes an effective leader, one Kenyan woman responded, "I guess I think of a visionary; someone who is capable of motivating others; someone who can put their own needs aside for the greater good; someone who can teach and inspire others to lead someone who bring people to action." But that is not me she retorted. In short, all the Kenyan women in this study claimed that they are not leaders, they merely had to get things done. In a familiar vein, the Singapore executives were modest about their leadership roles. "I don't think much about my position, really," a young executive reflected on her nationally-recognized achievements, "I've been in the media, in the radar, I don't feel like it's a wow thing…it is my religious belief to be humble..I keep going because (we're) not there yet." Humility is also expressed as a valued trait by a Kenyan.

"Humility, I think is the biggest thing for me that comes to mind……. knowing that no matter how big your vision is, understanding that you may not have it all and being open to criticism, being open to input, being open to other ideas is what is really important." Likewise a Singapore executive said, "I don't mind showing my weaknesses and vulnerabilities because I want my staff to know that I'm real." She further confided that she struggled with the notion that leaders should be strong and powerful because her style "is more relational, …and I thought there was something wrong with me." Nevertheless, this executive was able to keep a high-performing "loyal group" of staff with low turnover rate not typical of the sector by living true to her convictions and "walking the talk."

Differences between the Singaporeans and Kenyans

Although there were more similarities among the women in terms of leadership competencies and behaviors, a notable difference is the environment they operate in, such as the availability of funding for the Singapore women. When the government started to provide funds for work with at-risk students, the Singapore executive who had already established credibility in her work was able to expand her work considerably. Likewise, the non-profit organization promoting mental health was set up with a small grant from the government. Most of the Kenyan leaders, on the other hand, have to work to provide funds for their causes.

Spirituality, or a connection of self with the larger community, factored in as a significant part of the Kenyan women way of being and was articulated in greater depth by the Kenyans than the Singaporeans. Spirituality was experienced as a source for direction and purpose in life, a source for leadership practices and strength in the midst of challenges. Spiritual growth, in terms of a closer relationship with a higher power and greater self-realization and improvement, led to innovative solutions of community problems.

Kenyans credited their deep spirituality for enabling them to be successful in improving lives and changing others. The spiritual aspects demonstrated in the Kenyan data is supported by what the Africans refers to as Ubuntu - spirituality based on humanness aimed at building and sustaining community, in which the individual's identity is wrapped up in his/her collectivity – "I am because we are."

Kenya and Singapore Women: Through Western Leadership Lens

Two conceptual frameworks, tempered radical paradigm and transformational leadership were employed to examine women leadership in Kenya and Singapore. As transformational leaders, the women inspired others around a vision, communicated collective missions, garner respect, trust, admiration of followers, and evoked novel ways to address societal and community problems (Bass & Riggio, 2006). Intellectual stimulation, another characteristic component of transformational leadership, is evident in these women. Each of them has developed unique approaches to deal with community issues, and most have founded a non-profit entity to effect social change.

As tempered radicals, the women were driven to engage in neglected societal issues by their strong conviction and commitment to better their communities. They demonstrated a range of strategies from quiet resistance to go where others dare not go, using their knowledge for intervention, acting as intra-cultural change agents, leveraging small wins and collectivizing for common good.

A model that was not included in our conceptual framework but emerged as prevalent is the servant leadership paradigm. Greenleaf (1977) posited that a servant leader begins "with the natural feeling that one wants to serve first. Then conscious choice brings one to aspire to lead. That person is sharply different from one who is leader first, perhaps because of the need to assuage an unusual power drive or to acquire material possessions…The leader-first and the servant-first are two extreme types" (p. 34). All the women displayed characteristics that are considered essential factors of servant leadership, specifically in their commitment to serve others as a driver for leadership actions.

Presentation Session

Our presentation will follow the discussion model. A power-point presentation on the background of the research subjects as well as the countries represented will precede a large group discussion on the findings in the form of a Q & A session.

Conclusion

The comparison of the women leaders from Kenya and Singapore yielded an unexpected finding of more similarities than dissimilarities despite the differences in size, race, culture, community, politics, economics and government. There is a noticeable lack of a sense of personal power in the women's narratives with a strong focus on the work they were passionate about. Western perspective of transformational leadership appears leader-centered when contrasted with these action-oriented women's focus on resolving neglected societal problems through informal learning and experimentation. The idea of spirituality, manifested in different ways which may or may not be secular, is more pronounced with the Kenyan women. The source for some is secular but may also be transcendental in serving a higher purpose. The Kenyan women are deeply rooted in their community which affords them insight into embedded social issues. Although this exploratory study is revealing of non-western women's orientation to leading through relationships, the small sample size from both countries is a limitation that render the conclusion not generalizable. However, given the diversity in the backgrounds of these two groups of women, the startling similarities in their competencies and behaviors begs for further research in gender, culture and leadership.

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Collaborative Developmental Action Inquiry:
A Method for Envisioning the Future of Adult Learning Graduate Programs

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Abstract

The demands placed on adult learners in early 21st century life are complex, paradoxical, and ambiguous, bringing into question the ways that graduate adult education programs function. In this article we present the outcomes from a collaborative developmental action inquiry conducted with key stakeholders of a program in adult education at a research one university. The results indicate that a collaborative developmental action inquiry study itself can create the conditions for transformational learning to occur.

Keywords

Collaborative Developmental Action Inquiry, Transformative Learning, Adult Education

Introduction

Early 21st century reality features a constant diet of complexity, paradox, and ambiguity. While the disciplines of education are undergoing major philosophical shifts, the field of adult education has been slower to adjust to this hyper-compressed reality that adults now face. The result is that modern rational approaches to learning persist in a time of post-modern liquidity (Bauman, 2007). Such liquid times place unprecedented demands on adults to learn how to cultivate the capacity for skillful responsiveness to this new curriculum that leaves many adults in over their heads (Kegan, 1994). Through the growth of critical theory and an increased recognition that education functions as a liberatory practice, the field is slowly shifting towards more transformative approaches to teaching and learning (Bierema, 2010; Merriam & Brockett, 2007).

In this paper we will present the results of an inquiry into possible different futures for adult education graduate programing. This inquiry was conducted using a Collaborative Developmental Action Inquiry (CDAI) approach which allowed space for the study itself to become a transformative learning experience both for the researchers and the participants. Our paper will feature the method and discuss the conditions that generated space for transformative learning to emerge during this study. We begin with a brief overview of the literature, and then describe our methodology, showing how CDAI allows for transformative experience. We conclude with some reflections on the applicability of CDAI as a research methodology that can undergird and support space for transformative learning to occur.

Literature Review

Transformative learning brings together two distinct and yet interconnected conceptual frameworks: educational theories of adult learning (Brookfield, 1986; Knowles, 1976; Kolb, 1984) and the psychological theory of constructive-developmentalism (Kegan, 1982, 1994, 2000). According to Mezirow (2000), "transformative learning refers to the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits or mind-sets) to make them more inclusive, discriminating, open, emotionally capable of

change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action" (pp. 7-8). This is precisely the kind of learning needed in the process of leading adults to grow in their cognitive capacities and development of more complex ways of knowing in order to meet the ambiguous and paradoxical demands of early 21st century life.

Our study was guided by the notion that transformative learning is "a process by which individuals engage in critical self-reflection that results in a deep shift in perspective toward a more open, permeable, and better justified way of seeing themselves and the world around them" (Cranton & Wright, 2008, p. 33). Mezirow (2009) explained that transformative learning transforms problematic frames of reference into ones which are "more inclusive, discriminating, open, reflective and emotionally able to change" (p. 58). Frames of reference are composed of two dimensions: habits of mind and points of view. Habits of mind imply the broad predispositions people use to interpret experience. Points of view are "clusters of meaning schemes, or habitual, implicit rules" (Cranton, 2006, p. 37) which function as articulations of habits of minds (Mezirow, 1997; 2000); they are subject to continuing change as one reflects on experiences (Mezirow, 2000). A cumulative series of transformed meaning schemes leads to a perspective transformation, which is the change in a frame of reference (Taylor, 2008).

Mezirow (1997) highlighted that ongoing *critical reflection on assumptions* leads to sustained transformation. Mezirow also noted that transformation occurs through rational critical self-reflection and communicative discourse—engagement in conversation with others (Cranton, 2006; Mezirow, 1997; 2000), and leads to reflectively and critically taking action on the transformed frame of reference (Marsick & Mezirow, 2003). In particular, Mezirow (2003) emphasized that "to take the perspective of other involves an *intrapersonal process* … (and) also involves an *interpersonal dimension*, using feedback to adapt messages to the other's perspective" (pp.59-60, italics added). These threads of the theory informed our choice of a methodology that is focused in timely and transformative action and relies on transformative learning (Mezirow, 1991, 2000). We further chose a reframing process that engages deep reflexive inquiry on and in action (Schön, 1983) to bridge the gaps between intention and impacts.

In order to create the conditions for transformative learning we relied on Torbert's (1991, 1999, 2003, 2004) method of collaborative developmental action inquiry (CDAI) to generate a learning space for transformative inquiry. Collaborative developmental action inquiry is "a method to explore a kind of behavior that is simultaneously inquiring and productive" (Torbert, 2003). In other words, CDAI combines conscientious reflexivity in the midst of action, along with the potential for adaptation in the moment. The specific types of learning strategies that help to engage adults in this process of reflexive inquiry (Alvesson & Sköldberg, 2000) in the midst of action are 1) single-loop learning with a focus on behavioral adjustments, 2) double-loop learning with a focus on the exploration and potential revision of underlying assumptions for meaning making, and 3) triple-loop learning or "super-vision", or vigilance about how one's intentions, actions and impacts are aligned (Torbert, 2003, 2004; McCallum, 2008; Nicolaides, 2008; Nicolaides & McCallum, 2011).

CDAI (Torbert, 1991, 1999, 2003, 2004, 2009) builds a theory of single-, double-, and triple-loop learning, taking into account the difficulty of transforming our ways of knowing. In light of theories of psychological development such as constructive developmental theory (Kegan, 1982, 1994, 2000), ego maturity (Loevinger, 1976), and moral development (Gilligan, 1993; Kohlberg, 1984), Torbert suggests that adults can develop their capacity for double- and triple-loop learning by engaging in practices that simultaneously promote their growth in cognitive capacity and their levels of learning, reflecting, and adapting in action.

Methodology

Collaborative Developmental Action Inquiry

This research project was grounded in CDAI (Torbert, 1991, 1999, 2003, 2004, 2009), a transformational method of inquiry in and on action. CDAI "aims at both taking action and creating knowledge or theory about that action" (Coghlan & Brannick, 2006, p. xii). It works on a cyclical, iterative process and in itself is "a lifelong process of transformational learning" (Torbert et al., 2004, p. 1).

CDAI identifies three main units of experience: the first person (subjective—what an individual does alone); the second person interpersonal (inter-subjective—jointly with others); and the third person (objective and systemic—creating a community of inquiry) (Coghlan & Brannick, 2006; Torbert, 1999). Based on principles of

action research (Chandler & Torbert, 2003; Lewin, 1946/1997; Reason & Bradbury, 2001, 2008) and action science (Argyris & Schön 1974), CDAI proposes a means of personal, interpersonal, and organizational development that integrates inquiry and action. By using feedback loops of learning and knowing, CDAI directs attention toward gaps that exist between individual, team, and organizational intentions, strategies, actions, and outcomes. Each successive loop requires a greater level of developmental capacity to initiate, to learn through, and to complete.

As Figure 1 shows, single-loop learning identifies how gaps between action and outcome might be closed through changes in the intensity, rate, or manner of behavior used to achieve a goal. Double-loop learning inquires into the assumptions that guide the development of strategies. The process requires a greater awareness and a more challenging degree of learning to surface, comprehend, and revise those assumptions. Finally, triple-loop learning explores whether or not our intentions and purposes themselves are appropriate, requiring an advanced level of awareness and availability for adaptation.

Figure 1: Action Inquiry Model of Learning and Adaptation
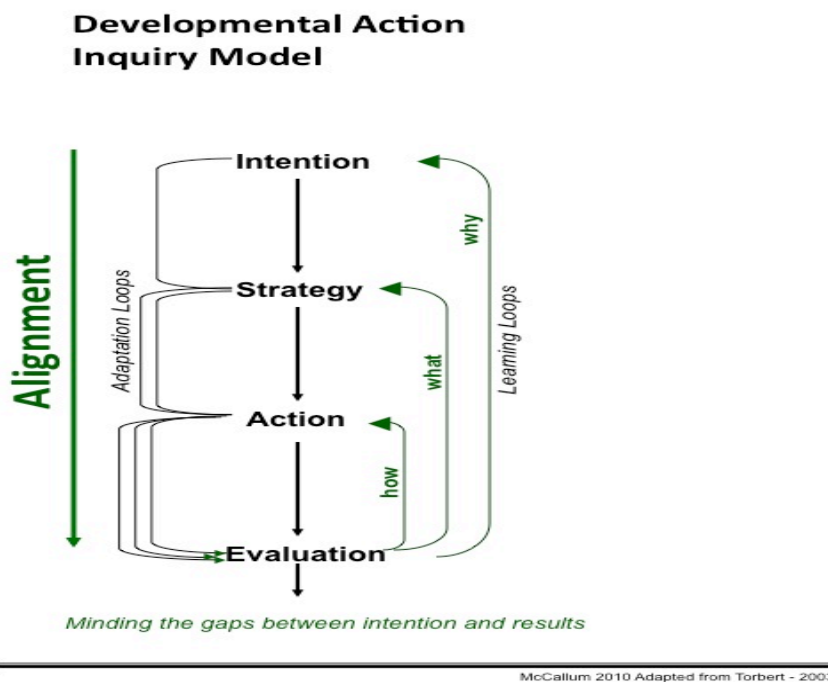
Action research becomes explicitly developmental when it incorporates the expectation of and capacity for growth (Reason & Bradbury, 2009; Sherman & Torbert, 2000; Torbert, 1991, 2003, 2009). At the individual level, the researcher is consciously attentive to the perspective they take and the meaning they make of unfolding events; they reflect critically on their own subjective meaning-making and test its validity. At the second-person or intersubjective level, researcher and participants interact and communicate regarding goals, perspectives, and intentions, in a consciously attentive way that gives space for trying new perspectives and learning from one another. At the third-person, objective level, the system or organization itself may validate the process through the resulting outcomes, or lead us back into another cycle of thinking, acting, and reflecting. Thus as we engage in the cycles of inquiry, we also continually engage in critical reflection about the way we are thinking; this is the aspect of action inquiry sometimes called reflection *on* action and it is simultaneous and ongoing with the process of reflection in or during action (Schön, 1975).

One strength of the collaborative developmental action inquiry approach to research is that researchers can engage in co-inquiry with one another and participants at every phase of the study and recalibrate as needed along the way. This approach allows the researcher to "mind the gaps" in the inquiry and in themselves, as well as in the participants, as the research progresses (Torbert, et al., 2004).

Another strength of CDAI is the capacity it offers for transformative learning to occur. With the increasingly complex demands of modern life, when our existing mental models fail us because they cannot attend to the multiplicity of calls on our attention and energy, we are ripe for a transformative shift in our thinking, both personally and organizationally (Kegan, 1994; Shaw, 2002). Because of its emphasis on critical reflection, and its willingness to challenge assumptions and entrenched thinking patterns, CDAI can create a "holding environment" (Kegan, 1994) where new ideas and perspectives can be explored. By engaging in the cycles of CDAI together, we create space for transformative learning to occur both individually and collectively.

Fundamentally, a transformative learning experience could occur in any cycle of a CDAI study. As participants or researchers reflect on their own personal meaning-making, they could come to personal awareness of mismatch between their thinking and behavior; or it could occur in interaction with others, or even in the process of applying or extending thinking and behavior to a larger group or organization. When these shifts happen, people are shifting from single-loop learning to double- and potentially even triple-loop learning (Torbert, et al., 2004).

Of course transformation is not guaranteed. Without critical reflection upon our own thoughts and a willingness to consider others' perspectives, we will remain stuck in old meaning patterns. In an example from the literature, when writing about the difficulties of uniting black and white feminists, hooks (1994) laments precisely the lack of developmental capacity among some white feminists which prevents them from considering the black women's perspective, and learning from and therefore being transformed by it. She argues that although the desire for transformation was sincere, without growth in understanding, it was not successful.

One of the issues hooks and other critical scholars address is that of power. As a discipline in the tradition of Freire, CDAI is directly concerned with power. In traditional research the researcher has power to make choices regarding the study, the participants, and the representation of the findings (Hesse-Biber, 2007). In CDAI, researchers and participants are integrally involved together to create "mutually transforming power" which can lead to authentic, sustainable change, both personally and organizationally (Torbert, et al., 2004, p. 8).

We believe that CDAI holds great potential to enable a transformative learning experience for researchers and participants. For the researcher, CDAI encourages us to be authentic, to develop integrity in ourselves, and to be consciously aware of the gaps in our ways of knowing (Torbert, et al., 2004). At the intersubjective level, CDAI encourages mutuality rather than hierarchy, encouraging us to learn from and be transformed by our interactions with one another (Torbert, et al., 2004). And at the objective level, it offers the ability to tackle complex problems and allow solutions to emerge, rather than using linear methods to arrive at relatively predetermined answers (Shaw, 2002). Thus CDAI offers great potential for transformation.

Study

Our research question was "How does adult education as a profession, field, and practice help adults, organizations, and society meet the demands of 21st century life?" To answer this question, our class in Program Planning and Development, under the guidance of our professor and with IRB approval, conducted a collaborative developmental action inquiry study among our fellow students, faculty, staff and graduates—the major stakeholders in our graduate program. We divided into four student teams for our first round of investigation. The first team interviewed students, alumni, and faculty of our online Master's degree program; they also conducted a focus group interview. The second group interviewed several College of Education deans, the third group interviewed faculty, and the fourth group conducted a focus group with master's degree students.

This process was somewhat delicate, as we were actively engaging our colleagues, professors, and supervisors in a process of questioning our own program; action inquiry is subversive because it encourages that act of questioning (Coghlan & Brannick, 2006). Yet these people are the key stakeholders in our graduate program and the ones with most knowledge of the topic, therefore ideal CDAI participants for this study.

Once we had completed our initial round of interviews, we gathered together as a class to share our findings. Each group presented our research and together we began a preliminary compilation of themes. This step represents the inter-subjective stage of CDAI, where together we consider the questions and answers.

The second round of investigation took place at our home institution's annual research symposium for adult education graduate students. By bringing the initial findings to a larger group, we engaged in the process of third-person inquiry, asking everyone present to reflect on and engage with our findings. At the same time, we were also conducting another round of first, second, and third person inquiry. During our hour-long session, each student researcher hosted a round table discussion with five or six symposium participants. We followed the three-part process of: 1) individually reflecting on the research question: 2) then mutually reflecting as small groups; and 3) finally collaborating together with all participants to look for themes and similarities in the data. Again, after the symposium, we collectively analyzed the findings and merged them with our first round data.

For the third round of investigation four of us presented our collected findings at the American Association of Adult and Continuing Education (AAACE) conference in November 2011. In that session as well, we invited attendees to participate in the same three rounds of inquiry as they interacted with and added to the current body of data. At each step of the way, both generating and analyzing data was carried out in a reflective, participatory process that allowed space for critical reflection, dialogue, and growth among researchers and participants alike. By developing our own capacities to inquire at the personal, group, and organizational level, we expanded our own and others' capacity for transformation, especially in the ways in which we became mindful of moments of emergence throughout our inquiry.

Analysis of the Process

In this section we will discuss some of the actual transformative events that occurred or failed to occur as we conducted our research. Cranton (1994) states that "Transformative learning is defined as the development of revised assumptions, premises, ways of interpreting experience, or perspectives on the world by means of critical self-reflection" (p. xii). One group with whom we interacted clearly demonstrated this shift; a second group, where the possibility of a shift emerged, failed to make that move.

A striking shift happened in the focus group with master's degree students. Until that discussion, although they were studying adult education, they had not actually perceived themselves to be adult learners. Rather they thought of themselves as preparing to work with those older than themselves. As the discussion unfolded, however, they began to ask for definitions of terms such as "adult" and "adult education." This led them to consider how society understands those terms and how their own thinking has changed as a result of their studies. Eventually, they began to realize that they themselves are actually adult learners and that much of what they were learning about adult education actually applied to themselves as well. In that one conversation their entire meaning structure shifted to enable them to consider themselves adult learners (Mezirow, 1991, 2000).

By contrast, a moment that seemed ripe for a transformational learning experience never quite materialized for one group of study participants. One group had interviewed the online students, and in combining the findings realized how hard those students worked to simplify issues of complexity in their daily lives. In other words, rather than recognizing that their mental models were perhaps insufficient to meet the current demands placed on them, they fought to reduce the ensuing complexity and make the world fit their conventional and well-honed mental models. For example, they tended to differentiate strongly between people skills and technical skills, even though the demands of an online learning environment surely require a blend of both. Further, the participants sought to define the demands of life in a bifurcated manner of work versus leisure, and "go fast versus go deep" in their learning. Demands and constraints on time in particular were an ongoing obstacle for them; yet rather than adjusting their mental expectations, they sought to accomplish increasing amounts of tasks by multitasking, working from home, and taking classes online.

These participants were not experiencing transformation as a result of their dilemma, but we as researchers had the opportunity to reflect on ourselves as the mirror of graduate demands was held up for us. As we compiled and discussed the participants' responses, we also engaged in critical reflection on our own need not to simply repeat the same old patterns that no longer work. It was temptingly easy to revert to instrumental, single-loop approaches ourselves. "We could reconfigure online classes this way" or "we could recommend the university do this or that"

ran through our discussions. Yet at another level we recognized that the 21st century world may well require a whole new approach to education, one that has not occurred to any of us yet.

Conclusion

By allowing for transformative experience-in-the-midst of the actions, using a CDAI approach provided space for the study itself to become a transformative learning experience. Early 21st century life places unprecedented demands on adults to learn how to cultivate the capacity for skillful responsiveness. Transformative learning is necessary for effective shifts in frames of reference to occur. CDAI provides a space within which the growth of critical reflection is possible, and in which shifts in perspective might emerge. Using CDAI allowed for possibilities for different futures for adult education graduate programs to be generated in our study. We suggest that use of the method could provide the same learning environment for a range of problems facing adults. CDAI could be used not only in academic settings, but in corporate and community settings as well. Each time we lead adults into developing the capacities for transformative learning, we are one step closer to discovering how to move forward together (Shaw, 2002) in these challenging times.

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Building Transformative Containers

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Pacific Integral

Abstract

Transformative developmental theory has arisen out of 40 years of longitudinal grounded theory and probability research, and continues to emerge with our developing understanding of *awareness*. Our *senses* give us access to perspectives about the external world, and our internal senses (visualization, thinking, emotions) give us access to internal worlds.

Awareness supports our core perspectives, which unfold in patterns and waves of consciousness. Systems and cultures recondition these levels of consciousness, revealing emergent, repeated patterns of humanity and its levels of collectives, which, then can be a support for our individual lives and for the design of collectives.

Keywords

Development, transformation, cultures, consciousness, developmental patterns, senses, awareness

Developmental Levels and Collectives

Newborns come wrapped in the container of exploding capacities that are awakened by their senses. Sight, hearing, touch, taste, and smell offer us ways of receiving information, but it is what we do with those pathways that brings us into the world of awareness, perspective taking and eventually into collective life.

We don't often think of perspective taking when we gaze into the eyes of a new born-yet from the very beginning, babies naturally bring awareness to life itself. As is well known, Piaget (1969) developed a theory of stages from childhood to adulthood. Indeed, all of these stages can be also found in adults as well (HY & Loevinger, 1989). Many other researchers have studied these emergent developmental phenomena, including Beck and Cowen (1996), Kohlberg, (1973), Fowler, (1981), and Cook-Greuter, (1999). Wilber (2000) has identified over 100 areas of developmental research that more or less agree on a fundamental trajectory of human emergence. While his maturing happens over one's entire lifespan, the time frame for each person seems to be somewhat unique trajectory, from birth through the sixth person perspective. (Wilber, 1995).

O'Fallon (2011) has developed a theory that envelops and extends HY & Loevinger's (1989) Cook-Greuter's (1999) theories to measure 12 adult developmental stages. Since this scale has the widest span related to adult development, it serves as a useful guide. Below is a pictorial model of how these stages work together.

Levels of Development

First through Sixth Person Perspective
Two perspectives per tier
Four levels per tier

(non-dual stages)

Tran...

Syste...

...m

2 ...C...f...

Rule Oriented

Ego-
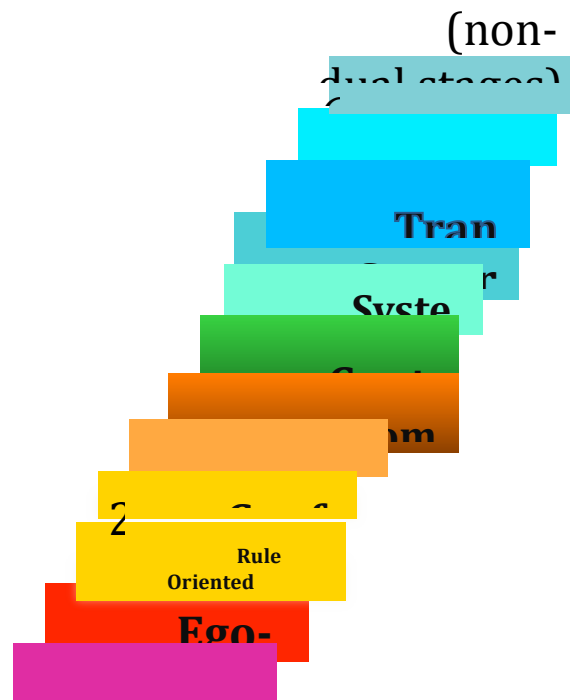
Figure 1: Developmental Stages

In this model there are four tiers of development; concrete stages, subtle stages, causal stages and non-dual stages. Each tier holds two perspectives and each perspective has two stages. For example the concrete tier has the first and second person perspectives, which include early first person (Impulsive), late first person (Ego oriented), early second (Rule oriented) and late second (Conformist). The next, subtle tier depicts the third and fourth person perspectives and this pattern iterates through the remaining tiers. *Time and Space* weaves itself throughout all of the perspectives, starting with in-the moment-at one's skin, to vast and eternal time and space of the latest stages.

Concrete Stages and Collectives

Early First Person Perspective: the Impulsive

The primary learning of the Impulsive stage is to discover the contours of the physical body—where does it start and where does everything else begin? This is the external part of this first person perspective. There is also an internal exploration; the concrete emotions that spring from these senses. We can concretely see, hear and feel when these emotions erupt: that is, sad (tears and crying), mad (temper tantrum) glad (laughing and smiling), fear (startle response), pain (combination of tears and tantrum), surprise/states (wide eyed) and so on. Their body/mind learns from copying (echolalia) and gradually grows internal and external skills and capacities.

Early on, they begin to recognize the permanence of concrete objects-that is, in the game of peek-a-boo, they begin to learn before the blanket is removed that a person is behind the blanket. These are early flashes/states that are precursors of visualization, which is required for taking later perspectives.

The Late First Person Perspective: Ego-Oriented

As an individual becomes adept in locating the confines of their body, they begin to own it; this is "my" hand, "my" face, " As they understand the concept of "mine" they begin to bring ownership to other concrete things that aren't part of their body; "my" toy, "my" work. Then they develop desires to "have" concrete items and begin to make choices. This is a yes/no, either/or a stage, which makes concrete choices.

.Language begins to explode as they begin to put words to objects, and also the beginning use of symbols; a picture, a word, a gesture that represents the concrete object they are referring to.

Time wise, this learning has focus in the moment; in order to experience the past, they must have cultivated their subtle senses (visual memory, auditory memory, kinesthetic memory) so until they do, there is no awareness of past, or future. Thus, people at this stage don't learn from their mistakes easily, nor can they project consequences out into the future, allowing them to avoid consequences.

First person Impulsive and Ego-oriented Collectives

When in the company with others parallel work/play is common at this stage—everything is theirs, from their point of view, and since others see exactly what they see, there is no need to talk things over or come to agreements. So the conversations in these collectives are ones of "talking at"—reporting what is in their own experience to others, rather than talking "with" where they are learning from others and asking questions for the purposes of getting information, rather than simply getting a response (or attention).

Early Second Person: Rule Oriented

At the first person stages children may stand in full sight of the person who is to find them in a hide and seek game, not yet knowing that other people can "see" them. They do not know when someone else is seeing something other then they are seeing.

To gain these perspectives the people must begin to develop their internal senses more acutely. The internal senses are direct corollaries to the outer senses. We have internal seeing (visualizing), internal hearing (hearing words and sounds in our minds), internal feelings, (emotions for example). When a person learns to use their interior senses they can imagine where someone has gone when they walk into the next room (and eventually, imagine an imaginary playmate!). It takes the development of these internal senses to progress to the taking of a second person perspective, where the person will understand that someone can see something they can't see. They also see the reverse; that they can at times see what other people can't. This ushers in "both/and thinking" or reversibility.

However, at times they can't visualize what someone is seeing so they begin to wonder what the other is seeing and will ask. This is the point where talking "with" as opposed to "talking at" begins to happen. The child now begins *conversations* to find out more about what other people know that they don't know, to learn something from someone else about what they don't see concretely, not just to get a response from them.

Memory of the past and seeing into the future also requires engaging these internal senses. Without them they only experience the present external moment, for the sense of time is a sensorial projection into the future or memory in the past.

Rule Oriented Collectives

Seeing that other people see things differently than they do, supports the move from the parallel play of singular side-by-side roles with others, to collective interactions, where they begin to make small agreements ("You do this and I'll do that"). In these interactions they learn that if they break these agreements, the work or the play falls apart so, rules take on greater and greater significance.

Agreements supports sharing, which support simple comparisons. When sharing, one quickly learns the *meaning* of one-to-one correspondence. "One for me, and one for you", and gradually brings *meaning* to accurate counting, adding and subtracting, dividing ("we each get half"), and multiplication. These capacities develop through a trial and error, inductive, experiential processes and bring about an ability to do simple concrete ordering, and the concept of fairness. Fairness supports a desire to not be different than the others, so now they want to look like and behave like the other people in their lives. Time wise, though they may forget often, there is a beginning memory of the past, for they can now remember more easily what happened earlier, and to remember the words of authority figures internally; this gives them the capacity to begin to learn from their mistakes and not repeat events that they didn't like the consequences to. They also begin to learn that the rules keep them safe—so they receive them from others in authority, (introjecting them); though remembering may still be difficult for them.

Late Second Person Perspective: Conformist

As the person develops, they become much more adroit in their capacity to visualize, to have auditory memory (remembering), to experience more subtle emotions related to rules, (e.g. guilt) and to prioritize all of these experiences, and thus to wait to get what they want. The capacity to prioritize experience and delay gratification

brings about new cognitive capacities;the capacity to naturally engage with concrete operations, doing concrete planning and prioritizing. Thus they can hypothesize concrete experiments and carry them out, such as how to build something concrete, and plan the steps to get there.

Conformist Collectives

Conformists own their own rules, and enforce them not only on themselves but project them onto other people, often judging harshly if those rules aren't followed. They introject rules into themselves, in an interpenetrative manner-with little difference between these two opposing sensibilities. While they can see into the past, they follow the rules of their collective without question, and in order to be accepted by others they do what they can to be acceptable; they want to look the same, have the same concrete objects, and go the same places as their friends. They don't want to be different, so criticism is difficult for them to take, because this insinuates that they have done something different than the peer group they are identified with. Outside groups are often frowned upon because they are different from the identified peers. "Going along with the crowd" is a common experience at this level, and thinking for themselves is not common. The common experience is often of following a leader: a dictator, on a country level, or the head of household on the family level.

Subtle Stages and Collectives

Early Third Person: Self-Aware

Something profound begins to happen when subtle ideas begin to rain into the individual's consciousness—the person realizes that rules were pre-established and recognize that these new subtle ideas that are being received are not, but may still have merit. Moving from a late second person perspective to an early third person perspective, the individual begins to do an exploration of their new self, and just like the early first person stage explored the boundaries of their concrete bodies, now they are exploring the boundaries of their subtle self, which is a completely new identity.

Again we see a maturing of the internal senses, which begin to hold subtle objects in addition to concrete ones. Now an individual can feel internal emotions that are not necessarily related to rules, such as empathy, or independence, in addition to sadness, or respect. They mature, from visualizing concrete objects and their operations, into visualizing subtle objects. They are able to imagine what someone else is imagining about someone else, (" I know what Tom is thinking about Mary's (concrete) situation")--or (I know that Tom is feeling upset because Mary is angry). This kind of seeing allows for the third person to imagine the probable in the short future, of what both Tom and Mary might do. These kinds of visualizations bring in the "subtle" idea of a future, as future time expands and the idea of being able to wonder about the future arises. Linear reasoning arises—supporting an understanding of symbols of symbols (e.g. engineering and architectural drawings).

Kinesthetically, like the early first person experience, they use trial and error, but rather than copying concrete responses of others, they now copy the subtle responses of those people they feel are an authority in an area of their interest, dismissing anyone else's ideas if they do not have that credibility.

Self Aware Collectives

Since they are discovering who they are as a subtle self, their focus is on themselves, and not so much on others, so they tend to not work that well in teams. They tend to take direction only from those they view as experts in their field, and see primarily from their own subtle view, not seeing that others can see from that position as well. Still they tend to focus on the same collectives that the Conformist levels do; however they will voice their focus on their individual sense of subtle self, and therefore champion individual independence/rights of ethnic groups, women and equality for those they can see external differences in.

Late third Person Perspectives: Outcome Aware

As the first person ego-oriented does in the concrete stages, the Outcome Aware stage can prioritize and choose (either/or) that which they see as "mine" but now with subtle objects, such as owning ideas; thus copyrights, patents and trademarks arise as do laws to support individual rights and ownership. Seeing what others are imagining of a situation allows them to devise a plan of how they might intervene so they begin to strategize and analyze, imagining how others will respond to their attempts. Using their interior subtle senses and imaginations they imagine into the future things that they haven't already done, so goal setting arises along with a plan to get there with benchmarks and feedback loops along the way.

Outcome Aware Collectives

Collectives at this level tend to support individual initiative while being friendly and engaged with each other…none the less it is a sophisticated subtle parallel work/play approach. They tend to support entities, such as government, societal, community, and family collectives with a focus on preventing an interference of individual rights, drives, initiatives and goals and they tend to form a "bigger is better" approach to their own initiatives; thus the rise of mega-corporations

Early Fourth person: Context Aware

"I can see that Jim is worried about Mary being frustrated when Tom lies to her—how Jim responds depends on how Mary reacts". This is a fourth person perspective; the fourth person will understand, that the third person makes interpretations about what the second and first person is experiencing, depending on his or her context, They also see the reverse; that others may judge you and the people you are engaged with, based on the context they are standing in, and also everyone can at times experience contextually what other people can't because they are standing in a different context. This ushers in "both/and thinking". Both of these experiences are "inside" of a context. Because of this intricate awareness of shifting behavior dependent on contexts, the Context Aware person is in-the-moment, very adaptable, agile, and recognizes assumptions and interpretations through their seeing of the social construction of reality and how people are formed by the contexts/environments/collectives they are living in,

Context Aware Collectives

The Context Aware Collective is subtle—that is, it can be described more by its subtle qualities than anything concrete, like cities and states and countries. For example, someone may be living in identical concrete conditions but one may be frigid and non-loving while the other might be supportive and affectionate. Or, the cultures and thus the norms might be different although two families are similarly loving and supportive. Or the cultures may be similar and the family loving and supportive but one lives within one worldview and the other lives within a different belief system. The Context Aware collective would hold all of these contexts as relevant with little prioritization of one over the other, but an acceptance that each person has been created by their collective and this can be a beautiful thing. Regarding the Context Aware collective that oneself lives in, there is an awareness of how others beliefs, interpretations and assumptions form the container for the collective and how that shapes each person in it. Thus one finds out who they are by hearing the views of everyone else in the collective, with an internal examination of how the views of the others in the collective resonate with and/or form them. Therefore it is important to hear every voice often, and to have everyone have a voice in how the collective forms.

Late Fourth person: Systems Oriented

At this level people can bring awareness to the internal systems of patterns and their own subtle judgments on others and they can turn those subtle judgments back on themselves, seeing that the very interpretations and assumptions they make of others they themselves own. They also see others projecting their assumptions and interpretations on them. This seeing of projections after the fact is the reciprocal interpenetration of the subtle. Thus they at times see their own introjections of others assumptions even as they see their own projections on others. Like the Conformist, who wants to please their peers, this capacity brings a kind of sanitized sensibility to their countenance and behavior.

They also step onto the outside of the contextual complexity to observe systems from the outside; this allows them to see multiple systemic contexts both nested and parallel systems on the exterior and also, interiorly, psychologically. They can see how systems recreate themselves through habits of communication and communication structures, and they can also experience the developmental differences in systems, can order their systems in appropriate ways for the benefit of their inhabitants, and see how different systems are interconnected.

Systems Oriented Collectives

These communities would focus on the interconnection of all systems with a deep respect for every developmental level and what they each can contribute, and each level of collective and what each can contribute to the other systems they are interpenetrated with. Since they can focus and interconnect inter-generationally, they can project the operations of complex systems over a long period of time-beyond their own lifetime seeing that results often take more than a few years.

The Causal Stages

There are four causal stages-the Construct Aware stage, the Transpersonal Stage, the Universal stage and the Illumined stage. These stages are very rare, constituting together less that 2% of the people measured in our research. They are the leading edge of consciousness. They are rare enough that, while we have individual experiences with people at these stages and are doing research correlations on them they are not common enough to predict what kind of collective would arise out of them.

Summary

There are twelve stages of development (O'Fallon, 2011). The four concrete stages constitute the first and second person perspectives; the four subtle stages constitute the third and fourth person perspectives, and the four causal stages constitute the fifth and the sixth person perspectives. Each of these individual world-views forms a particular kind of collective, which is related closely to the corresponding perspective. It appears that the universe and its people are ever evolving.

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Wisdom Journey: The Role of Experience and Culture in Transformative Learning Praxis

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Abstract

Transformative learning is increasingly practiced within multiple domains and levels. *Domains of praxis* include psychotherapy, spiritual practice, business, education, civil society, governance and the law, and the arts. *Levels of praxis* include individuals, teams, communities, organizations, and societies. Distinct *approaches* to Transformative Learning Praxis have emerged within local communities of practice. This paper provides an overview of Meridian University's approach to Transformative Learning Praxis.

Key words

Domains, Levels, Approaches, Praxis, Learning Activities, Competencies, Creative Action, Liminality, Cultural Innovation, Leadership Capacities, Creative Transgression, Cultural Leadership, Cultural Innovation

Introduction

Transformative Learning is both an individual and collective process that has played a pivotal role in the emergence of human culture. There are numerous and often competing definitions and frameworks for Transformative Learning.

This paper was prepared on the occasion of the 10th International Conference on Transformative Learning entitled, *A Future for Earth*. In this paper, *Transformative Learning* refers to learning that engenders the emergence of distinct human capacities in a unique and connected way. It goes beyond acquiring information and technical skills, to developing capacities, habits, integrated skills, and values. Competencies such as these enable individuals, communities, and organizations to be capable of wise and creative action. Transformative learning entails shifts that have been characterized as shifts in perspective, perceptual lenses, core beliefs, schemas, mental models and mindsets. Such perceptual shifts enable individuals and systems to inhabit new, more complex and emergent landscapes.

The term *praxis* refers to the integration of theory and practice, reflection and action. Scores of distinct approaches to Transformative Learning Praxis are now in use around the globe. Many of these distinct approaches are often not framed within a discourse that utilizes the term *transformative learning*. If we imagine Transformative Learning Praxis as a vehicle, then these distinct approaches may be imagined as distinct vehicles towards a common direction or destination. Transformative learning is increasingly practiced within multiple domains and levels. *Domains of praxis* include psychotherapy, spiritual practice, business, education, civil society, governance and the law, and the arts. *Levels of praxis* include individuals, teams, communities, organizations, and societies.

Origins of Transformative Learning

"Tell me, Muse, of the man of many ways, who was driven far journeys," So begins the first sentence of Homer's Odyssey. We can imagine Odysseus' journey and other mythic journeys, like Parsifal's journey as ancient and medieval narratives of transformative learning.

Transformative learning appears to be as old as culture itself; in fact transformative learning arguably is the engine of cultural evolution. Excavating the mysterious history and even pre-history of transformative learning provides a window into both individual human development and our collective, cultural evolution. The mythologies of ancient as well as contemporary indigenous cultures provide numerous metaphors for the journey of transformative learning. The contemporary discourse on transformative learning in the field of Adult Education can

overlook these profound and ancient sources of transformative learning. This long journey of transformative learning, shrouded in the mists of time, maybe imagined as a journey towards wisdom, following the aspirations embodied in the name of our species, *home sapiens*.

Culture has transformed in significant ways with each historical epoch. This historical and cross-cultural view of transformative learning suggests that the process of transformative learning has been ever-present and ubiquitous in the human cultural journey. When we consider the initiatory practices of diverse cultures, we recognize how significant socially integrated transformative learning is in the life of human communities. Contemporary, post-modern communities, without necessarily using the term *transformative learning*, take secular approaches to transformative learning within multiple institutional domains and at various levels of human systems.

Domains, Levels, and Approaches to Transformative Learning Praxis

The term *transformative learning* has most often been utilized in higher education, specifically the literature on Adult Education emerging out of schools of Education. This literature has been theoretically rich, however it has paid relatively less attention to *practice*. While faculty in higher education have focused on transformative learning theory, practitioners of transformative learning in various institutional domains have been developing their practices most commonly without framing their work specifically as "transformative learning." It is now important to integrate transformative learning *theory* and transformative learning *practice*, in support of developing transformative learning *praxis* applicable to multiple domains and levels of practice.

Figure 1 below identifies distinct domains of transformative learning praxis. Such domains include psychotherapy, religious organizations, civil society, business, education (K-12), higher education, health care, the arts, and governance and law.

Domains of Transformative Learning Praxis

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In each domain, the praxis of transformative learning can influence what competencies are focused on, and what competencies are off the radar - what competencies are valorized, and what competencies are disregarded. For example, in higher education, conceptualization competencies tend to be valorized, while intuition competencies tend to be devalued; in the domain of psychotherapy insight used to be valorized, while now it is considered to be far less important to the aims of psychotherapy. In most of the institutional domains represented in the diagram above, transformative learning is not the norm. Knowledge is a source of power and privilege and modern organizations and social institutions are organized to concentrate power and privilege. Such conditions are not optimal for transformative learning. A hopeful trend is also apparent as complex and rapid change contributes to engendering both the need and conditions for transformative learning.

Levels of Transformative Learning Praxis

In addition to distinct domains of Transformative Learning Praxis, it is important to consider what level of human system is being engaged. By *level* in this context we can refer to dyads, teams, organizations, communities, societies, nations and even human civilizations as a whole.

The tendency to think that individuals learn but that collectives do not learn still runs deep, given the contemporary culture of individualism. One important example of collective learning is the practice and institutionalization of democracy, which may be understood as a competency for both individuals as well as collectives, at any of the levels noted. Frequently we might use terms like *mutuality* for relationships and *collaboration* for teams and organizations. However, competencies associated with mutuality and collaboration as related to democratic institutions interpenetrate and manifest at all levels.

When we shift our attention to *level*, we have shifted our attention to *collective* transformative learning. While collective transformative learning has played a key role in the evolution of culture and the emergence of civilization, the deliberate practice of this kind of learning is still quite limited in the critical domains of governance, business, and education. Collective transformative learning has a central role to play in creating a just and sustainable future, making it key in the shift from *exploitative* globalization to *generative* globalization. High stakes, long term, multi-stakeholder collaboration is enabled and catalyzed by collective transformative learning.

Approaches to Transformative Learning Praxis

Distinct *approaches* to transformative learning praxis have emerged within local communities of practice. Such approaches typically have a *domain* and *level* applicability profile distinct to that approach. More often than not its proponents describe the approach without the specific reference to the theory and practice of transformative learning. Implicitly and sometimes explicitly, these approaches intend to facilitate prospective transformation and cultural shifts. The intensive engagement of transformative learning within a geographical location or network gives rise to specific concepts, principles and practices with vernacular names and descriptions. As a result of the emergence of the Internet and the worldwide web, Meta approaches that draw in distinct ways on multiple approaches to transformative learning are also in evidence. This plurality of approaches to transformative learning offers a rich brew for advancing transformative learning praxis.

Opening the Gates to Experience: Transformative Learning at Meridian University

Over the last twenty years, a distinct approach to transformative learning has coalesced and been refined at Meridian University. This approach is based on the following four propositions: 1) All human learning entails experiencing; 2) Various personal, social, and cultural dynamics *gate* experience, thereby undermining learning; 3) Appropriately designed learning activities liberate and restore experience, thereby providing fresh ingredients for learning and 4) The experience liberated through learning activities is carried forward through creative action.

Dynamisms of Experience: Imagination, Emotion, and Otherness

Experience is perilous. The inherent *peril* associated with experience is implied in the root stem of the word, *per,* which is the Old French word for lead and pass over, and which subsequently enlarged into *peril*, meaning danger or risk. There is no significant human learning, which does not in one way or another, diversify, deepen, embody and personalize experience and in so doing, perilously disrupt the routines of familiar identity.

Imagination integrates and amplifies the somatic, affective, and cognitive dimensions of experience. Imagination may be further differentiated into various modes of imagining that are sense, capacity, and context specific. Attending to images enables both recognition of *differentiation* and the *integrative* imperative of experiencing.

The deepening and diversification of experience is an encounter with 'otherness.' *Otherness* refers to those aspects of one's experience of self and other that can evoke barriers to recognition, empathy, engagement, and understanding. Otherness may then be understood as *difference* experienced problematically. Differences perceived as *other* maybe denied, disavowed, suppressed, repressed, tolerated or trivialized, instead of being recognized and engaged to enhance learning. Empathic imagination refers to the mode of imagination most relevant to relatedness between humans as well as human connection to the *more than human*.

It is natural to turn away from what might be perceived as risky or dangerous, thus individuals in transformative learning settings must choose to forgo the comfort zone of familiarity. Overwhelming experience and the associated threat/fear of 'losing one's mind' goes with the landscape of transformative learning. There is an underlying threat intrinsic to intense experience, which is perceived as a perilous threat to one's normative identity. However, as Plato stated over two thousand years ago in the dialogue, *Phaedrus*, "There are two types of madness, one arising from human disease, the other when heaven sets us free from established convention." In a real sense, profound shifts in perspectives, mindsets, and mental models are often experienced as losing one's familiarly known mind. This is rarely accomplished without emotion transmuting into capacities; for example the emotion of fear transmuting into the capacity of courage or the emotion of shame transmuting into the capacity of conscience.

Four, distinct kinds of dynamisms of experience may be identified and supported through appropriate learning activities that serve to contain the actual risk and the perceived threat of learning experiences that have the potential of transforming identity:

- **Diversifying** experience: Practices of working with multiple nodes of identity as well as states and structures of consciousness.
- **Deepening** experience: Practices of engaging the symbolic depths of experience through story and myth.
- **Embodying** experience: Practices that reconnect the somatic dimension of experience with the cognitive and emotional dimensions.
- **Personalizing** experience: Practices that cohere in the present moment, diverse and new experience of personal identity. In the course of individual development, an *experiencing I* emerges into consciousness. This *experiencing I* is embodied and personal to the degree that dissociative adaptations to trauma and stress are not impinging consciousness.

Transformative learning is contingent on engaging the learner's actual experience in ways that deepen, diversify, embody, and personalize the learner's experience. Transformative learning transforms the learner. In the transformative learning process, the learner's experience, consciousness, behavior and life all transform. However, these transformations in behavior, consciousness, and life all require learners themselves to shape the clay of their own experience.

Identity, Liminality, and the Gating of Experience: Responding to Barriers to Transformative Learning

We have been acculturated to develop habits that resist and avoid the dangers and perils that we sense await us if we were to allow for full depth and measure of our experience to emerge. As such, a natural tendency, even for those who are drawn to learning environments that aspire transformative learning, is to avoid being with one's experience. A key observation here is that if there is no resistance to the learning experience from the individual or collective participating in the experience, then it is likely that a transformative threshold has not yet been reached. In this respect, resistance to experience is a signal that at transformative learning threshold has been engaged. A comprehensive understanding of transformative learning therefore calls for an understanding of the dynamics of resistance, and barriers to, transformative learning.

One significant way of working with these barriers involves personifying and externalizing these barriers. This externalized dynamic, referred to as *gatekeeping* is conceived as the individual and collective dynamics that resist and restrict experience, demanding perfection and thus paralyzing the individual from taking various risks, seeking out new experience, and shifting out of static and familiar identity. Gatekeeping is understood as an adaptive

dynamic which may arise as a protective measure and can help a living system survive under specific circumstances, but becomes maladaptive when the circumstances change. An essential feature is that because its dynamics partly arise as protective measures from ways we have been hurt or threatened by others, it can help to defend from experiences of dependence on others and as well protecting one from failure, by *denying individuals and systems new experience.*

Considered more broadly, individual cultures have their own complex, historically derived belief systems, patterns, and norms of behavior, all of which combine to restrict the experience of their citizens, from birth. As with individual gatekeeping, over time these dynamics become internalized. We think of these internalized, culturally sourced dynamics that serve to restrict experience as *Cultural Gatekeepers*. Cultural gatekeepers are the restrictive and resisting forces in individuals, families, organizations, communities, and societies that ensure conformity with a culture's current rules, norms, values, and taboos via *cultural trance* and coercion. Cultural gatekeepers are the personification of collective dynamics in a given culture that resist cultural transformation.

The receptiveness, openness, and curiosity of beginner's mind is essential because every transformative leap forward in competency is preceded by a liminal period of disorientation and de-integration. An effective holding environment, sustained by a supportive learning community culture and a disciplined facilitator and/or team, is essential for safe passage across the liminal phase of this kind of learning. It is clear that learners progress at the speed of their own practice, not at the speed of the learning activities or facilitator's wishes. The potency of the experiencing 'I' is contingent on both embodying and personalizing experience. Transformative learning is much more like a sea journey than a land journey, in that there are no landmarks on a sea journey.

Transformative learning works through encountering failure, given that certain beliefs, belief systems, mental maps and even our identities, must 'fail' in order for more complexity to emerge. However, this kind of failure can be risky, as analogous to the caterpillar who fails to emerge from the chrysalis as a butterfly, individuals can at times become stuck in the failed places, without emerging into more complex levels of perception. We can see that transformative learning necessitates *bringing discipline to the experience of failure.* Such discipline entails the understanding that without failure, there is no transformation. As such, we need to relearn our relationship to failure, understanding that without failure, there can be no real transformation. Transformative learning flourishes when learners act with *developmental humility* and facilitators act with *developmental compassion*.

Maieutic Alchemy: The Transforming Power of Learning Activities

The key to the integration of informational and transformative learning is designing powerful learning activities, which have the effect of disrupting the learner's familiar mindsets and habits. However, these learning activities would not be effective in the absence of a nuanced, alchemical container for creative inquiry. The learning activity optimally is designed with learning sequences and learning cycles in mind, so that the learner's experience may be mid-wifed in ways that elaborate the learner's uniqueness.

The design of robust, creative, and transforming learning activities, requires such elements as:

- Contexts for expressing experience where the learner surrenders to unfolding experience.
- Creating context for the restoration of experience and the practice of possibility.
- Transdisciplinarity (Transdisciplinarity ensures that the mindsets/mental models of a particular discipline can be an object of inquiry, and not always the medium of inquiry).
- Designing learning spaces infused with a dimension of play.
- An inspiring embodiment of leadership capacities by facilitators of transformative learning;
- Drawing on the learner's somatic experience.
- The learning community's functioning as a holding environment.
- A learning community culture that is aware of how oppressive, social habits creep in through "walls."
- A learning praxis that recognizes that learning activities require sequencing and an understanding of learning cycles.
- An understanding that after the learning activity, a context for creative action is necessary.

- That learning activities are optimal when formative assessment is embedded within the activity.
- Attending to issues of diversity, social justice and oppression.

The craft entailed is in providing the learning activities that evoke and contain the learner's experience while increasingly engaging learners in shaping the learning activities. Engagement in co-creating emergent learning activities is deeply empowering for the learner, and profoundly shifts the educational process out of the syndrome that Freire referred to as the banking system of education.

In this learner-centered approach to learning, learners' experience spontaneously unfolds in ways that reflect the impact of social injustice and oppression. Attention to the learner's unique experience ensures that oppression and other social justice issues that have impacted the learner emerge, and are addressed. At its best, the experience of participating in learning activities liberates the learner's experience from the definitions, prescriptions, and devaluing intrinsic to oppressive injustice. Instead, the learner's experience, as it deepens and diversifies, can transmute into leadership capacities that empower the learner on their chosen path of vocation and profession. The sequence of learning activities enable the learner to elaborate their experience and capacities in ways that are unique to them and not a formulaic superimposition of the curricular intent. While transformative learning is a wise path to wisdom, the facilitator must ensure that the learner travels this path in their own unique way, and not as a set formula.

Learning activities are designed to engage the learner's experience through various expressive modalities, like writing, expressive/poetic spontaneous speech, movement, drawing, and rhythm. The intent is to empower through engaging the whole person. As Daniel Pink conveys in his influential book, *A Whole New Mind*, engaging the right hemisphere of the cortex is key to the competencies that are driving contemporary society and economy. The effectiveness of learning activities is significantly enhanced when linked to specific practices, subsequent to the learning activity. Learners progress at their speed of practice. It has therefore been important to cultivate a culture of practice, which helps to sustain momentum in the face of barriers to learning. Learning activities followed through with effective practice reorganize neuronal connections.

Establishing a culture of practice is key to sustaining a learning community where one is willing to wear their white belt. That is to say, where everyone is willing to approach challenges and thresholds with the open inquiry of beginner's mind. This quality of mind is essential for learners to feel both motivated and humble enough to submit to the ongoing repetition of practice. Learning activities offer the structure, container, and context where resistance to learning can be transmuted into curiosity and engagement with otherness.

The Enactment of Competency: Integrating Informational and Transformative Learning

Profound transformations in our world are currently underway on many dimensions— personal, environmental, cultural, societal, and economic. Future professionals need to understand how to engage in a world full with challenges and opportunities that exist within conditions of radical uncertainty and complexity. To engage these challenges, we must collaboratively reimagine how we can engage individuals, institutions, and societies in learning new capacities and habits of being. Whether or not learning will be transformative depends on the kind of competencies that are intended as the objective of the learning.

In this respect, we can distinguish between two distinct categories of competencies: Those developed through *Informational* learning, and those developed through *Transformative* learning. The figure below, *An Ecology of Competencies*, identifies the distinct kinds of competencies that the Meridian curriculum is designed to develop. It is vital to recognize that under the transformative learning column are the kinds of competencies that have not received sufficient attention in secular higher education. Faith based institutions have deep commitments that make them more effective in developing the kinds of competencies noted in the transformative learning column. While Meridian is not identified with a particular religious faith, the education we offer remedies what is missing in modern, secular education.

An Ecology of Competencies

Informational Learning	Transformative Learning
• Facts	• Leadership Capacities: Courage, Compassion, Clarity, Conscience, Reflexivity
• Concepts	• Perceptual Shifts (insights/values)
• Principles	• Qualities of Being and Habits of Functioning: Faith, Dignity, Humility, Discernment, Gratefulness
• Technical Skills	• Integrated Skills
• Professional Stories	• Archetypal Stories

When a blend of both kinds of learning are integrated an ecology of competences is cultivated. Key to this integration is the development of capacities. *Capacity* understood as a distinct dimension of human development and human evolution that delineates a specific potential for responding to a domain of life experience (e.g., Compassion responds to Suffering; Courage responds to Danger; *Destinicity* responds to the Future; Dignity responds to Failure; Fierceness responds to Injustice; Faith responds to Uncertainty; Reflexivity responds to Personal Identity; Discernment responds to Complexity.)

Within higher education, both learners and faculty are under intense pressure to acquire and transmit ever-increasing information. These circumstances result in a focus on competencies associated with informational learning. However, performance deficiencies seen in professionals with graduate degrees suggests that something vital is missing in higher education. As Parker Palmer and Arthur Zajonc convey in *The Heart of Higher Education* (2010),

> "Higher education looses upon the world too many people who are masters of external, objective reality; with the knowledge and skill to manipulate it, but who understand little or nothing about inner drives of their own behavior… We need to stop releasing our learners into the wild without systematically challenging them to take an inner as well as outer journey. Integrative education can help us do just that." (Palmer, P & Zajonc, A., pg. 49)

At Meridian, we understand the missing but vital element to be distinct competencies that are not informational in nature. This other type of competency is associated with personal strengths or qualities that will enable future professionals to acquire and manage vast domains of information in effective ways, and to participate in their world through wise and creative initiative. It is this goal of creative initiative, tempered and shaped by sound judgment, which is of utmost importance.

The future calls for integrated competencies that enable professionals to acquire and manage vast domains of information, effectively enough to participate in wise and creative initiative. Transformative learning both diversifies and integrates the ecology of competencies inhabited by individuals and collectives. A *generative*

learning environment enables the learner to acquire and develop their own distinct ecology of competencies that will travel with the learner, because competencies have become the learner.

Transformative learning creates more texture for informational learning to adhere, increasing the likelihood that the information is more likely to 'travel' with the individual. Transformative learning is the learning that travels with the individual or group because it changes the learner at the same time. Even information learned via transformative learning methods has become more a part of the individual because of how this kind of learning affects the experiencing dimension.

We consider the emergence of new learning outcomes as one way in which collective wisdom emerges through transformative learning activities, when practiced in coherent and sustained learning communities. When learning communities stay together for several years, they provide a context for a diverse, phase-specific journey, with side excursions.

The Importance of Assessing Transformative Learning

At Meridian an effort is made to have learning activities not only promote learner development but as well to simultaneously perform an assessment function. It is a shift of assessment *of* learning, to assessment *as* learning. We imagine such *Integral Transformative Assessment* as the next horizon of assessment practices in higher education. At Meridian an assessment practice (often a learning activity) that has the potential of eliciting or shifting the learner's awareness of his or her mental models is considered to be a transformative assessment. The effort is to prepare learners for the deeper inquiry that is necessary as complexity, uncertainty and ambiguity increase. As our focus is to assist learners to become aware of their perceptual lenses, this process entails significant vulnerability and difficulty.

In establishing Meridian's assessment practices, we pause to ask the question: What competencies are the most critically important to educate for? In responding to this question, we consider the following priorities: 1) The objectives which most matter to our individual and collective flourishing. 2) The objectives that are emerging out of the institution's engagement with a rapidly unfolding context, i.e., professional, social, cultural, and ecological.

Such deep inquiry into purposes has inspired us to focus on virtues or capacities as learning outcomes. Through the ages and in many wisdom traditions, wisdom's intrinsic value has been affirmed. At Meridian, we imagine wisdom as a quality of being and a mode of perception that is constituted by several consciousness capacities (which in some contexts we also characterize as leadership capacities). Virtues may be construed as capacities and qualities that have enduring cultural significance.

Learning from one's experience as a source of knowledge helps the learner to understand that their previous lived experience can be drawn on to understand conceptual material. In fact, what the learner already 'knew' may be part of a coherent but culturally and academically marginalized body of knowledge, for which the learner had no name. Strategies congruent with these ideas are at the heart of transformative learning, i.e., learning about the world and engaging with one's chosen profession through the portal of one's own lived experience.

Since transformative learning necessitates approaching the learner as a whole person, its assessment calls for an integral approach to assessment. An integral approach to transformative assessment entails paying significant attention to the learner's consciousness, behavior, experience and the social and cultural contexts of the learner's life. As such, the transformative assessments in use at Meridian attend to learners' emotional, cognitive, aesthetic, and political development. To quote Palmer and Zajonc from *The Heart of Higher Education*, (2010), "Transformative learning rests on an enriched view of the human being, one that affirms our multi-dimensional nature and fundamental malleability."

When we combine the depth of transformative learning processes with the necessity of informational learning, the rich weave that results is referred to at Meridian as the Pathway B Difference. The figure below contrasts two learning curves: one for informational learning (Pathway A) with that of Pathway B, which integrates informational learning with transformative learning. While Pathway B is challenging for both learners and faculty - given that on Pathway B there are dips and even plunges in competency during the liminal phase of the transformative process - when compared over a longer segment of time, Pathway B empowers more competency in less time.

The Pathway B Difference

- Pathway A: Informational Learning
- Pathway B: Informational Learning + Transformative Learning

The Transformative Learning Advantage
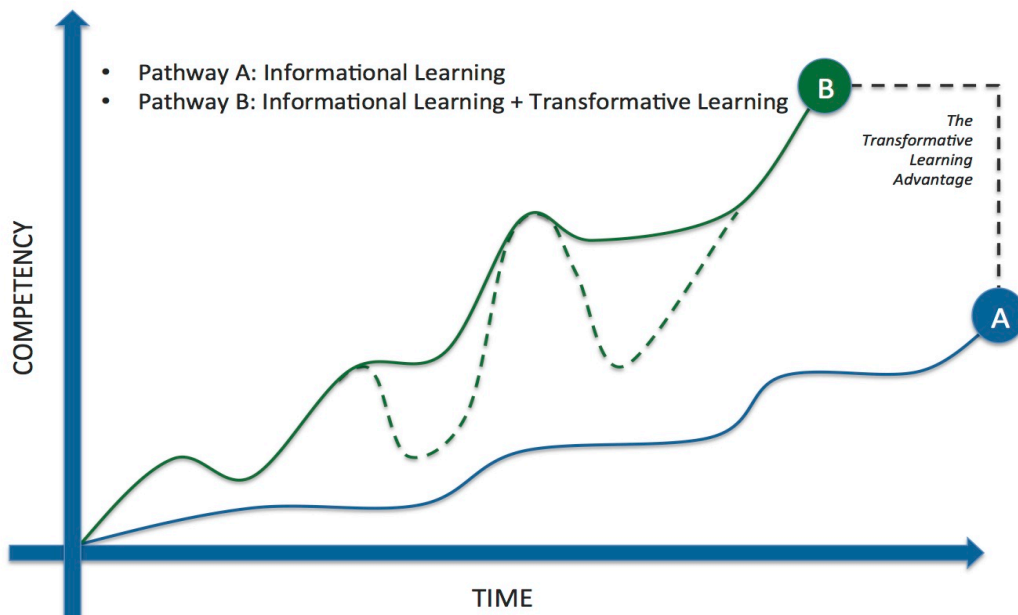
COMPETENCY

TIME

This figure models how learners develop more competencies, in less time, when informational and transformative learning are woven together. This transformative learning generates new 'surface area' for new information to adhere to. Contemporary neuroscience recognizes this phenomenon through recent breakthrough advances in neuroplasticity research, which now validates the idea that transformative learning changes the brain's structure, affording the learner the ability to integrate more information in more, applicable ways. In this way, the learner acquires knowledge that 'travels with them.'

The Sacred Ouroborus: Creative Action and Cultural Transformation

An approach to education that has profoundly impacted the education of the underserved across the globe is the work of the great Brazilian educator, Paulo Freire. Four major dimensions of Freire's work can be identified for emphasis: First, that effective learning best takes place within a dialogical classroom involving learners and teachers engaged in mutual inquiry. Freire's likening conventional education to that of a banking system involving the educator making deposits into the otherwise passive learner, guides our insistence that learners actively participate in their own work of inquiry and discovery. Second, Freire's concern with praxis - education that in addition to increasing learners' knowledge-base guides the learner towards the value of making a difference in the world - is a key tenet in our work with learners. Third is Freire's attention to giving voice to those who historically have not had a voice. An important element of this is Freire's notion of *conscientization* - the expansion of consciousness that is understood to have the power to transform reality. Fourth, Freire's emphasis on situating education within the lived experience of participants is especially applicable to fostering the depthful education of adult learners.

When the purpose of learning is to act creatively in the service of building the world, the integration of informational and transformative learning has a pivotal role. Creative action, when it is pragmatically transgressive, transforms culture, enabling new experience that shapes the next cycle of learning. In this way, cultural transformation supports the complex generational learning cycles that constitute the emergence of *collective wisdom*.

Culture may be construed as a collective mindset or perspective. Cultural Leadership is constituted by creative transgressions that initiate legitimacy inquiry into collective mindsets. By creative transgression we mean a way to break the cultural trance, which denies difference, and to catalyze the recognition and engagement of those differences between people that have been denied, suppressed, or trivialized.

Creative transgressions are characterized by three distinct features: First, they involve *principled actions*. Second, they involve *imaginative actions*. Third, they entail *conscious sacrifice*. A creative transgression is *principled* when it is in alignment with the truth. It is this alignment that gives principled action its potency

A creative transgression is *imaginative* when the transgression evokes a new, specific, and unexpected experience which 'shakes up' its recipients such that the subsequent labor of meaning-making becomes a necessity. In addition to practical implications, the transgression then has symbolic impact. As symbols are images condensed with meaning, new or revitalized symbols disrupt the prevailing cultural fundamentalism existing at the center of established cultures.

A creative transgression entails *conscious sacrifice* if the transgression requires the willingness to experience loss of privilege, difficulty, and/or failure. Creative cultural transformation is facilitated by the capacity to surrender through creative action to the meanings, possibilities, and necessities inherent in the present moment, thereby engaging the force of truth. The process of Transformative Learning inevitably disrupts culturally infused mental models, hence the significance and necessity of Cultural Leadership.

While wisdom is not a fixed destination, wisdom emerges in the journey of transformative learning, within an archetypal pattern of eternal return. Wisdom maybe understood as the ability to discern quality and to take creative action on behalf of quality. The emergence of collective wisdom, catalyzed by the praxis of transformative learning, is of utmost importance for *A Future for Earth*.

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Crossing the Great Leadership Competency Divide with Horse as Guide

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Abstract

Powerful collaborative relationships between horses and humans have existed for thousands of years. Much of man's success on the planet can be directly attributed to this inter-species relationship – a relationship based on an unspoken kinesthetic intelligence. Much attention is spent looking at the role of emotional intelligence (EQ) in developing effective leaders. Yet, kinesthetic intelligence (PQ) is the overlooked and under leveraged learning construct when developing effective leadership capacities. This interactive and experiential workshop explores this gap in contemporary leadership theory and development and shows how the horse just might be our guide once again to new leadership horizons.

Key Words

Horses, intelligence, leadership, experiential, inter-species communication, kinesthetic, somatic intelligence, equine assisted learning, emotional intelligence, transformational learning, intersubjectivity

Introduction

Crossing the Great Leadership Competency Divide with Horse as Guide is an interactive workshop that explores the importance of leveraging kinesthetic intelligence as a learning construct when developing leadership competencies and how horses are the master teachers when it comes to teaching humans about this important intelligence. The presentation begins with a historical pictorial demonstration of the collaborative relationship that has evolved between man and horse over the millennia - from basic survival (as food and hides), to transportation, to fighting wars, to sport, to therapist and teacher to humans. This workshop explores and defines kinesthetic and somatic intelligence (PQ) and how it differs from and enhances the other innate intelligences - intellectual (IQ), emotional (EQ), and spiritual intelligence (SQ). It seems rather silly to have to remind ourselves that without a body we would not be sitting here reading these words, experiencing our emotions or using our minds for critical thinking. Yet, in reality our relationship with our body's intelligence is taken for granted, often ignored and almost never consciously leveraged to learn more about ourselves, about others and the way we can become better leaders. There seems to be a similar blind spot in contemporary leadership theory, a noticeable gap in the literature and research that looks at consciously incorporating and leveraging PQ for competency development. Reasons behind this divide between the utilization of PQ and the utilization and emphasis on other intelligences will be discussed. This workshop is designed to familiarize the participant with several contemporary theories that confirm and support the transformational experiences that occur when humans intentionally collaborate with possibly the most somatically intelligent being that has been domesticated by man - the horse.

Unfortunately participants in this workshop will not have a chance to directly experience the somatic power of horses but will get a chance to experience a similar awakening of somatic intelligence in an exercise called the Somatic Sphere of Influence. This is a leading and following exercise where two people walk silently beside each other attempting to meld two moving identities into one synchronized identity which is very similar to when horses move in synchronized ways in a herd and/or when horses and humans establish a collaborative leadership relationship.

Horses and Man: A Brief History

Ancient paleolithic cave paintings dated as early as 30,000 BC depict the hunting of horses for meat, with evidence of man beginning to domesticate and ride them around 4000 BC. "'Horses caused the first globalization," says Melinda Zeder, an archaeologist at the Smithsonian Institution in Washington, D.C. "They allowed cultures to grow from isolated pockets to interconnected spheres of influence.'" (Weed, 2002). With their newfound horse power indigenous peoples of the world saw them as symbols of power both political and spiritual. Horses play a big role in Greek Mythology as the divine steeds of the gods, with Zeus' chariot being drawn across the sky by the four Wind Gods in the form of horses.

Between 4000 and 3000 BC horses accompanied humans into battle. Horses continued to be used in warfare until they were phased out with the advent of tank warfare in World War 1 (Wikipedia, 2012). The high art of dressage has its roots in training the war horse for maneuvers on the battlefield. Training a flight animal to endure the firing of rifles, cannons and explosions requires patience on the part of the person training them but also a deep trust and bond that unites the two in a sum greater than their parts.

In North America between 1680 and the early 1700s "horses galloped their way into tribal culture, revolutionizing the way American Indians lived, notably on the Great Plains. They made hunting easier, battle more efficient, travel faster and traditions richer. Before long, a deep connection between human and animal had been forged that would never be broken, despite many attempts by settlers to sever it" (Kovach, 2011). Starting in 1804 Lewis and Clark, and the settlers who followed in their tracks, crossed the Great Continental Divide with the aid of horses. The west was discovered, settled, farmed and fought for by both Indians and European settlers on the backs of strong, brave, swift, and intelligent horses. If it weren't for the horse we would not be here in San Francisco today to explore the new ways in which the horse human relationship is evolving.

The influence of the horse on all cultures of the world is widespread and according to J. Andrew McLaughlin "ranks alongside the invention of the wheel in terms of significance" (2001). To this day we still rate our engines in horse power and it is thought that many railroad gauges were based on the width of horses pulling carriages (trams) and carts of materials on rails. "As English railway historian Charles E. Lee wrote, it probably represents the optimal size of a road vehicle relative to the indivisible size of a horse. Anything less would have underutilized the horse, and anything greater would have put excessive strain on the animal" (Hilton, 2006)

With the advent of the automobile the horse human relationship transitioned towards one of pleasure and profit with cattle roundups, rodeos, pleasure riding, equestrian sport, racing and breeding being the more common ways in which humans collaborate with horses. It has only been in the last 40 years that the horse has made its way back into the lives of people outside of the horse industry, this time as healer, teacher and facilitator of learning.

Over the past two decades there has been explosive growth worldwide in the emerging Equine Assisted Activities industry. In the United States alone there are more than 700 centers that provide some type of equine assisted learning program, and four internationally recognized associations, Equine Facilitated Mental Health Association (EFMHA), Equine Assisted Growth and Learning Association (EAGALA), Equine Guided Education Association (EGEA) and Equine Experiential Education Association (E3A) that teach, support and certify their members in collaborating with horses for healing, and human growth and learning purposes (Hallberg, 2008). Around the world a growing interest in how the horse helps people to learn and heal has lead to a repurposing of unwanted horses from the racing and the sport horse sectors.

Kinesthetic Learning

Valuable clues to inform how we lead are as close as our own bodies. This is a radical statement but an important one because ignoring physical intelligence - information from the body - is both a profound oversight and a missed opportunity for developing human potential and leadership competency. "Each of us possesses a computer far more advanced than the most elaborate artificial intelligence machine available, one that's available at any time. The human mind itself... [and] the body can discern, to the finest degree, the difference between that which is supportive of life and that which is not" (Hawkins, 1995). It is the physical realm of experience (PQ) that supports the other three realms of human experience: the intellect (IQ); the emotional (EQ) and the spiritual (SQ). For horses PQ dominates and is what allows them to survive. There is no separation between a horse's thinking and what it is doing with its body.

Richard Strozzi-Heckler, Ph.D. co-founder of the Strozzi Institute in Sonoma County, California, is an authority on leadership mastery as well as a sixth-degree black belt in aikido and has developed programs in team building and leadership training that emphasize the importance of leadership as a somatic experience. He firmly believes that the "body [is] indistinguishable from the self" and that "it is essential to include the body if one wants to build the skills of exemplary leadership" (2003).

So why is it that when it comes to the study, teaching, and development of leadership skills and competencies that the extraordinary abilities of the body to manage and interpret feedback from the environment are not taken into account and leveraged for growth and learning? Why is the body's felt sense and wisdom so often overlooked by most integral leadership theories and methodologies that, by definition, must include the wellbeing, balance and sanctity of the body? Perhaps, as humans have evolved, the role of the body and its abilities to perceive and react to its environment to provide safety, food and shelter have been usurped by intellectual, emotional and spiritual pursuits. The body is taken for granted and simply becomes the "vehicle" for these other pursuits. What if

the physical realm of experience were to take a much more informative role in how we self-educate and communicate, much like a horse? What if it could be applied toward effective leadership development?

Horses: The Ultimate Kinesthetic Being

Horses are animals of prey and not predators like humans. This entirely different instinctual orientation and perspective determines behavior. With large eyes on the sides of their heads, horses employs a 360 degree awareness of spatial relationships, allowing them to perceive and react immediately to stimuli in their environment. By being hyper-vigilant and acting immediately to stimuli, the horse keeps itself safe in a predatory world. Because of this prey orientation, horses provide humans honest, in the moment feedback about how we are showing up. They do not lie and they do not hold grudges. Neither do they hold opinions about 'who you are', only 'how you are' showing up.

Horses communicate almost exclusively through body language, responding to their instincts for self-preservation, therefore requiring people to develop an understanding of and a proficiency in using the same language as those they desire to lead - in this case it means influencing the horse via body language and focused intention. Learning how to do this is not unlike corporations who desire to gain and maintain a competitive market advantage in a global market by employing strategic liaisons who learn the language and cultural customs of the country they wish to do business with.

Another important feature that makes horses such good teachers of PQ is that they are social herd animals with their place in the hierarchy of the herd determined by their ability to communicate in the present moment, through clear body language, their dominance and their ability to act in the best interests of the entire herd. Because of this herd dynamic they are leader seeking beings, and therefore, natural followers. They want to identify a leader so that they can relax their hyper-vigilance and trust that their safety will be attended to. In the realm of leadership, natural horseman and equine communication educator Chris Irwin states, "you may be strong enough to establish leadership, but you also have to be consistent enough to keep it. Horses... don't think in terms of 70 percent or 80 percent. Either you are the boss or you're not… If we want horses to focus their attention on us, we must learn to focus ours on them. That's easy enough to do in spurts. The real trick is to learn to maintain it for as long as we need to. There's no automatic pilot on horses. They are constantly sending you messages and they constantly need some response" (Irwin, 2001). The moment your attention lapses is when the possibility of either you or the horse getting hurt increases by your inability to provide safe leadership. Quite literally the lives of both human and equine depend on competent leadership that takes its cues from a place of embodied awareness.

Intersubjectivity: The Leveraging Point

We cannot talk about the role of kinesthetic intelligence in transformational change and learning without looking at the important role and intersubjective nature of feedback. We get to know ourselves by first bumping into ourselves via interaction with the environment and with other individuals. Nothing grows or evolves without incorporating and responding to the sometimes overt, but more often than not, very subtle feedback from the environment. Therefore, transformational or integral change depends on a leader's ability to utilize - give and receive - and ultimately take action on that feedback.

The last three decades have introduced the intersubjective perspective into leadership theory and development strategies. Torbert's Action Inquiry, Kegan and Lahey's Transformational Languages, Otto Scharmer's Theory U and Strozzi-Heckler's School of Embodied Leadership (as mentioned above) are just a few examples of intersubjective methods of human development and transformation. Integral philosopher, Ken Wilbur also feels that "a truly integral transformative practice, would give considerable weight to the importance of relationships, community, culture, and intersubjective factors in general..." (Wilbur, 2000).

Furthermore, if self-knowledge is primarily gained through the shared awareness present in relationship with others, then there would be far-reaching implications for a second-person methodology in consciousness studies (de Quincey, 1998), and leadership studies (Pohl, 2006). Without "conscientia" or "knowing with" there would be no communication and evolution would become a 'chance' event (de Quincey, 1998).

There are three common threads among these theories and methods. The first is the premise that through relationship with others and the environment we come to know ourselves. Second, embodiment of leadership is a natural byproduct of each process, and one that is so close to us that we take it for granted. Third, any attention given to PQ is generally a side bar in training and development programming. For example, Otto Scharmer and

Associates at The Presencing Institute weave creative movement/dance modules throughout their Presencing Foundation Program as a way of getting people 'aware of' and 'in their bodies'. However, with the exception of Strozzi-Heckler's work in somatic leadership development, the theories and philosophies presented here do not specifically leverage PQ as a resource for learning leadership competencies and creating transformation in individuals and organizations.

Theory, Kinesthetic Intelligence and the Gap Between the Two

Learning Through Action

William Torbert, professor of management and former director of the Ph.D. Program in Organizational Transformation at the Carroll School of Management at Boston College, has written extensively on the process of questioning in relationship with action, a process he calls action inquiry. This process, according to Torbert, is the basis for experiential learning. He states that "experiential learning involves becoming aware of the qualities, patterns and consequences of one's own experience as one experiences it" (1972). The way in which Torbert's work lends credibility to the notion of leveraging PQ for developing leadership competency is in cultivating awareness of four levels of feedback available to us. Single-loop feedback is critical for reaching goals efficiently and effectively. The information we get from single-loop learning lets us know if our most recent action taken advanced us towards the intended goal. Double-loop feedback is "the awareness that transcends one's self image" (Torbert, 2004) and allows a person to see his or her own mental construct or 'action logic' and to view his or her actions from a different vantage point. This second order feedback, according to Deutch, is called 'learning' and its function is to alert the system to changes it needs to make within its own structure to achieve its goal including, perhaps, even changing or redefining what the goal is (Deutch as cited by Torbert, 1972). Triple-loop feedback "makes us present to ourselves in the present moment" (Torbert 2004). "Third order feedback is called 'consciousness'" (Deutch as cited by Torbert, 1972).. "Its function is to scan all system-environment interactions immediately in order to maintain a sense of the overall, lifetime, autonomous purpose and integrity of the system" (Torbert, 1972) and is known as "super vision" (see Figure 1). This third level is much like how a horse operates both individually and within the herd. The fourth territory is being aware of our attention itself. Though rare, this fourth level ability is truly unique to the human being.

Figure 1: Practicing "Super Vision" (Pohl, 2007. Photo used with permission)

Since horses are somatic beings, our desire to develop a leadership role demands a sympathetic awareness, clarity of intention for what we want them to do while simultaneously physically embodying the language of equus. It also requires the ability to sustain this level of attention outward and inward over long periods of time. In other words, one must literally show up as a congruent leader to gain the attention and respect of the horse. Once this is done in a consistent manner the horse willingly follows without bribery (carrots) or coercion (sticks). In natural horsemanship this is known as 'join up' (see Figure 2). When successfully done, "join up" feels and looks like magic. In fact, it is simply the outcome of sustained and consistent awareness, triple loop feedback, and right action used simultaneously.

Figure 2: "Join up" (Pohl, 2007, photo used with permission)

Why then is "super vision" so rarely utilized? One reason is that very few individuals can sustain this quality of presence over long periods of time because it uses perceptual muscles rarely used in normal waking life. It is a transcognitive phenomenon that requires our body and brain to multitask (Torbert, 1972). Working with horses in both structured and non-structured ways provides people an opportunity to experience these different feedback loops and to build the awareness and muscles needed to embody this important form of transformational learning.

Perhaps we do not develop these meta skill sets described by Torbert because incorporating a mental construct/theory of awareness into our behavior without a somatic experience of what it means to do so is difficult. Finding facilitated experiences that allow us to learn, practice and apply kinesthetic intelligence simultaneously with relational problem solving (intersubjectivity) are few and far between. While Torbert's action inquiry does *implicitly* bring the notion of PQ into learning leadership skills and competencies - via a person's overall awareness of that experience and through the use of language to act on the information that feedback give us, it does not *explicitly* (consciously) leverage the body's response to feedback from the environment to better gain an understanding of what is actually happening when being 'in the present moment.'

Learning Through Introspection and Self
Inquiry

Another method that is similar to and builds upon the powerful Action Inquiry model is described in the book *How the Way We Talk Can Change The Way We Work: Seven Languages for Transformation* (2001) by Harvard University's Professor of Adult Learning Robert Kegan and research director of Harvard University Graduate School of Education, Lisa Lahey. By closely observing the language patterns found in groups and organizations Kegan and Lahey were able to dissect, analyze and identify seven different patterns that are the raw ingredients of transformational change. "Each language is a tool, transforming a customary mental or social arrangement into a form that increases the possibility of transformational learning" (Kegan & Lahey, 2001). These transforming languages, to varying degrees, also correspond to Torbert's use of language for transformational purposes in his Action Inquiry model and therefore have the capacity to embody leadership. Kegan and Lahey's model could be described as transformational leadership psychology, focused in the realm of emotional and mental constructs, and yet, once again, does not fully leverage the body's unique ways of gathering the information needed in the present moment to make the distinctions about what works and what doesn't work from which we then act or react, feel or think.

Conclusion: Remember the Body

Until now, theories and methods for creating transformations in people and in organizational systems have focused on the intellectual and the emotional realms while the intelligence and information our body provides has been overlooked and therefore an under leveraged resource. By re-membering PQ we have a direct, practical, and systematic way of sensing the integration and alignment of mind, body, emotion, and spirit, which not only makes us more effective leaders but offers a competitive advantage in the global market place.

By teaching leaders the significance of feedback and embodying leadership through effective modalities like Equine Guided Leadership Education we can address workplace performance problems as they arise. Making dynamic/somatic feedback a developmental mission could be a new paradigm for high performance organizations.

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Figures

Figure 1. Pohl, L. (2007). Practicing Super Vision. Retrieved October 9. 2012 from Lissa Pohl's Photo archive and used with permission of the participant.

Figure 2. Pohl, L. (2007). Practicing Super Vision. Retrieved October 9. 2012 from Lissa Pohl's Photo archive and used with permission of the participant.

Ecology, Critical Reflection And The Praxis Of Change

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Abstract

The scope of the environmental crisis currently facing the planet presents humanity with enormous challenges, not least of which is challenging long-held assumptions about our relationship with the non-human world. Transformative approaches to professional education, with a focus on critical reflection, provide examples of ways in which an ecological consciousness can be facilitated. Drawing on examples from educational practice in Architecture and Social Work, the potential for critical reflection to bring about attitudinal change is explored through engagement with a number of specific reflective tools which can be employed in teaching practice and which are transferable into many other disciplines.

Introduction

The nature and extent of the environmental crisis facing humanity today points clearly to the need for radical transformation across all dimensions of human existence. Social, political, economic and cultural change will all be required if we are to move towards a more just and sustainable future. Underpinning all such changes are the transformations required at the individual level. It is through the collective efforts and demands of individuals that the impetus for broader societal change will develop.

This workshop emerges from the praxis of three educators who, in their respective disciplines of architecture and social work, and on opposite sides of the globe, engage in work characterised as 'teaching for transformation' (Pooley, 2011; Jones, 2011). In particular, the facilitators are involved in using critical reflection as a means of supporting students to identify, re-evaluate and transform their assumptions and preconceptions about their relationships to nature, and in doing so become more environmentally responsible.

The Environmental Crisis – Alienation and Change

While the magnitude of the environmental crisis has now been well documented (IPCC, 2007), and general agreement has emerged that urgent action is required, actual progress towards any deep and meaningful transformation of humanity's destructive attitudes and behaviours remains painfully slow. While the reasons for the glacial pace of change are complex and involve the broadest of economic and geo-political machinations, some responsibility must rest with the lack of clear demands for change arising from ordinary people in societies around the globe. Those voices that are calling for change are significant (Mohammed, 2010), but remain a minority and are too easily disregarded and marginalised by power-holders with vested interests in maintaining the status quo. Why is it that for so many of us the environmental crisis remains a distant and seemingly non-urgent problem, occupying so little of our conscious attention?

Part of the answer to this important question may lie in the ecological alienation that has come to define the experience of many people around the world and particularly those in the Global North. The concept of ecological alienation, or what Louv (2008) refers to as nature-deficit disorder, calls attention to the many ways in which human experience has become disconnected from nature, with which it is actually inextricably linked and indeed, upon which it depends. For many people living in the West, we are divorced from the sources of the very things we depend upon for our existence – clean air, water, food – as well as from the consequences of our lifestyles and consumption decisions – waste, pollution, destruction, injustice (Berry, 1999; Stone & Barlow, 2005). In the light of this alienation, one aspect of the transformation required if we are to move towards a more just and sustainable society must be to re-establish and re-value an ecological consciousness.

Critical Reflection

Critical reflection has been identified as an essential component of the process of transformative learning (Cranton, 2006; Mezirow, 2000). Essentially, critical reflection, as described by Mezirow, refers to the critical examination of existing assumptions and presuppositions. It can be thought of as a process of assessing "*how* or *why* we have perceived, thought, felt or acted" (Mezirow, 1990, p. 6). Mezirow has suggested two key types of reflection, firstly, critical reflection of assumptions, or objective reframing, which involves critically reflecting on the assumptions of others, and secondly, critical self-reflection of assumptions, or subjective

reframing, which involves critical self-reflection on one's own assumptions and in particular the ways in which one's world view may be limited and distorted (Mezirow, 2000; Taylor, 1998).

While Mezirow argues that transformative learning (that is, of both meaning schemes and perspectives) can occur as a result of either of these types of reflection, it is the critical self-reflection of assumptions which is more likely to be involved in a perspective transformation:

> *...although the transformation of meaning schemes (specific beliefs, attitudes and emotional reactions) through reflection is an everyday occurrence, it does not necessarily involve self-reflection. We often merely correct our interpretations. On the other hand, the transformation of a meaning perspective, which occurs less frequently, is more likely to involve our sense of self and always involves critical reflection upon the distorted premises sustaining our structure of expectation* (Mezirow, 1991, p. 167).

Used constructively and with intent, critical reflection can assist us in identifying and evaluating long-held assumptions and limiting beliefs about the world around us. Yet engaging in such critical reflection is not always easy, particularly for those of us for whom reflective practices have not featured as part of our personal or professional experience. In the authors' respective fields of architecture and social work, critical reflection has been understood and practiced in a variety of ways, particularly within the area of professional education.

Critical Reflection in Architecture
We understand a map best when we are able to draw it out for ourselves. The best way to understand is to do. (Kant (1966) [first published 1803])

The very nature of architectural education is founded on the principles of problem based and active learning. Critical reflection sits implicitly within the iterative design process where students are encouraged to reflect on the process as well as the design proposal. By encouraging critical reflection in design it is hoped, but not guaranteed, that a reflective practitioner, capable of complex problem solving, will emerge through the continuous process of reflection in and on action (Schön 1991). Architecture schools engage their students through field trips, site studies, making and doing. These experiences become important by encouraging students to develop responses to unique situations, learning through reflection and action how to tackle new, unique and demanding problems (Nicol and Pilling 2000). Fortunately there is no one right answer when designing; your proposal can more or less respond to the clients brief, tutors' workshop or competition rules. The key repose lies with the individuals; the direction of their moral or ethical compass, a response that belies a concern for the wider environment.

Responses to the environmental imperative from the architectural profession have been with us for several decades, yet it is only relatively recently we have see increasing legislation and tightening regulation of the construction industry, in an attempt to diminish the impact of the built environment on ecological degradation. Despite commitments from the profession a year after the Rio Earth Summit in 1992 there is still much to do to enable architects to understand and achieve this (Williamson and Radford 2000). Whilst legislation and regulation is broadly welcomed by those who have been pushing for change, compulsion will always be just that, compulsion. Forcing the tools of environmental responsibility cannot be the only driver for change. Whilst pan European programmes designed to promote improved environmental action through curriculum change and developing tools for delivery are useful (Educate 2010), how effective are these in bringing about ecological awareness? Overuse of compulsion can lead to environmental action becoming a mere response rather than a proactive ethical imperative. Exploring underlying values and ethics is crucial if there is to be understanding of how to move ecological consciousness forward within the profession (Spector 2001).

What interests us as educators is what sits behind the motivations of students to follow a certain path; how, where and when do students develop their ecological consciousness? Trying to unpick what some of those motivations and ethical dimensions might be has led to several reflective workshops with architecture students; attempting to unearth the relationships between student motivations, environmental responsibility and ecological consciousness, touching on what Fox (2006) refers to as ecological integrity based ethics. The aim of the workshops was to identify the extent of the relationship between students' experiences and their choice of study. The two-hour-long workshops were structured using three distinct yet interconnected reflective activities exploring moral and ethical values as they related to wider environmental issues.

Several students reported experiencing what Mezirow (1991) describes as a disorientating dilemma, this driving them on to their chosen academic path. One student wanting to repent for a professional life in a polluting industry, another reacting to witnessing a disaster involving many deaths. Surprisingly the majority of

students had never made any connection between their life experiences, often based on feelings as well as events (Dirkx 2000) and their choice of career, taking part in a workshop and being able to make those connections came as a revelation.

Reflective practice is as significant for students as for educators and those in the profession (Boud, Keogh et al. 1985; Schön 1991; Moon 1999) and in many ways is nothing new. These exercises can be viewed as a starting point in developing a reflective practitioner, encouraging architecture students to think beyond environment as mere built form, beyond issues of climate change and green house gas emissions and reducing the impact of buildings through good design. A reflective practitioner does not necessarily imply an ethical practitioner, and certainly does not imply a practitioner with fully formed ecological consciousness. Nor are we talking about addressing the mere impact of the building itself, the ethical dilemma of the built form or how it reacts with the environment; what we need is a good designer and an ethical designer (Spector 2001). Reflective practice, a curriculum based around sound knowledge of environmental issues, legislation and professional body governance cannot guarantee this alone. Serving the client is not the same as serving the community or the wider environment as a whole even when this is embedded in professional codes of practice (Till 2009). Understanding students in a way that enables us and them to make sense of their current path is very valuable; understanding where they are going and recognizing their role in the global solution to the global problem.

> *Humanity cannot triumph in the adventure of reducing the human footprint to a sustainable level if that adventure is not undertaken in a spirit of global partnership. Collapse cannot be avoided if people do not learn to view themselves and others as part of one integrated global society. Both will require compassion, not only with the here and now, but with the distant and future as well. Humanity must learn to love the idea of leaving future generations a living planet. (Meadows 2004:282)*

Perhaps there is an interesting parallel to be drawn here between social work and architectural education; where both are concerned with human interactions with the environment; social work being concerned with responses to and architecture primarily being concerned with the production of.

Critical Reflection in Social Work

Critical reflection has usually been seen as a core component and concern of social work education and practice (see, for example, Clare, 2007; Gould and Taylor, 1996; Napier and Fook, 2000; Redmond, 2005; Sheppard, 1998; Yelloly and Henkel, 1995; Yip 2006;). D'Cruz, Gillingham and Mendez (2007) have reviewed the literature surrounding reflexivity and critical reflection in an attempt to establish greater clarity about the meaning of these terms and their use in social work education. They note that the concepts of reflexivity and reflection have emerged as critical and constructive responses to a growing recognition within social work education of practice as a rich source of knowledge and theory, and of the importance of analyses of professional power as potentially both emancipatory and oppressive. They also note the conceptual blurring in the literature between reflexivity and critical reflection. According to D'Cruz et al (2007), reflexivity tends to be used in three ways: to indicate the process of making a response to a particular context, and subsequent choices for future action; a self-critical questioning of the sources of power and knowledge; and with reference to the role of emotions in social work practice. Practices in social work education probably most closely approach the concerns of transformative learning when critical reflection "focuses on change in individuals… linked to an agenda for social change through collective action" (D'Cruz et al, 2007, p. 87).

It is in this sense that critical reflection emerges as a useful tool in attempting to promote an ecological consciousness. The arguments of ecological alienation point to the stubborn persistence of limited and distorting views of humans' relationships with the non-human world. Increasingly, it is recognised that social work as a profession, while claiming to be primarily concerned with 'person-in-environment' has actually adopted a narrowly social understanding of environment, one which tends to exclude the non-human world. Facilitating transformative processes through critical reflection is an important part of the pathway towards a changed consciousness, personally and professionally, and this is a pathway that aligns neatly with the use of critical reflection more broadly within social work. As Fook and Askeland (2007) argue, when applied in a social work educational setting, critical reflection

> *… involves the identification of deep-seated assumptions, but with the primary purpose of bringing about some improvements in professional practice (Fook & Askeland, 2006; Fook, in press). What makes such reflection critical is the focus on power (Brookfield, 1995, p.8) which allows the reflective process to be transformative, especially when linked with the basic ideas of critical theory (Fook, 2002, pp.40–41). In this latter sense, critical reflection must incorporate an understanding of personal experiences within social, cultural and structural contexts* (p. 521-522).

A wide range of specific strategies has been employed in attempts to facilitate and foster critical reflection in social work education. Osmond and Darlington (2005), for example, describe a range of techniques for promoting critical reflection, including: the use of reflective questions and prompts; the use of pictorial representations; techniques of thinking-aloud, observation and critical recall; and, knowledge mapping. Of particular interest, perhaps, is the development of reflective writing techniques. Walmsley and Birkbeck (2006) and Rai (2006), for example, discuss the use of autobiographical writing as an exercise in promoting critical reflection about students' values and life experiences. These authors argue that such an approach can be highly effective and deeply powerful, but is predicated on the existence of trust between students and educators.

In a stand-alone unit exploring the links between social and environmental issues, social work students are challenged to use reflective, autobiographical writing, amongst a number of other strategies, to explore their own relationships with the non-human world. For many students this task represents the first time that they have been actively engaged in considering this relationship and the outcome is often a profound questioning of long-held and previously unexamined assumptions about their place in the natural world. The recognition of a limited personal worldview mirrors the realization of the narrow and limited perspective traditionally promoted by the profession itself, and in both cases opens a door to considering how alternative worldviews, based on an expanded ecological consciousness, might lead to both personal and professional transformations.

The experiences of students engaged in these processes suggests that the development of reflective techniques holds great potential within social work education and more widely, to contribute to transformative processes and to expanding students' ecological consciousness.

The Workshop

In this workshop, the facilitators present a number of specific tools designed to promote critical reflection, which they have used successfully in their own teaching over many years. These include, amongst others, moral storytelling, values identification, time-lines, ecological autobiographies, genograms and eco-maps. In particular, these tools have been used to address the issue of ecological alienation and to call students' attention to their relationships with the natural world. The tools, the rationale behind their use, and their transformative potential are described, illustrated by examples drawn from the facilitators' own experience. The workshop has been designed as an experiential session, with participants given the opportunity to engage in critical reflection using a number of these different techniques.

On conclusion of the workshop, participants will have an increased awareness of the need to address issues of ecological alienation; knowledge of a number of specific tools for promoting critical reflection; an experience of using such tools themselves to prompt reflection; and some ideas about how such techniques might be adapted and employed in their own practice contexts.

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Integrating Study Abroad Experiences

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Abstract
This paper explores, through the lens of transformative learning, the extent to which study abroad experiences re-shaped Kosovo students' identity and how re-shaped identities were integrated into graduates' personal and professional practice in Kosovo. Through active interviewing the study attempts to capture participants' experiences of integration and contributes to an understanding of the interrelationship of individual change and societal change. Furthermore, it offers insights into the role of transformative learning as facilitating individual capacity within changing societies. I argue that the process of transformation is guided by personal and environmental factors and that students' capacity as change agents is influenced by the extent of transformation and by workplace factors in Kosovo.

Key Words
Study –abroad, transformative learning, identity, agency, workplace

Introduction
Kosovo's post-war educational sector has been shattered by communist rule, ten-years of ethno-national oppression and war. As a response, one of the main international post-conflict reconstruction efforts in Kosovo since 1999 is the promotion of societal change through education. Internal educational reforms carried by Kosovo and international authorities in addition to foreign donors have financed Kosovo young graduates and professionals education in Western universities. The beneficiaries are viewed by scholarship providers as change agents who are expected to contribute to effecting change within the workplace and society, thus creating economic and social benefits for Kosovo(The World Bank, 2007). More than 300 Kosovan beneficiaries have completed their Master's and doctoral studies in Western universities; all have been successful in finding public and private sector employment (Qirezi, 2011).

The central purpose of this research, which is part of my PhD, is to explore the extent to which study abroad experiences re-shaped Kosovo students' identity and how re-shaped identities were integrated into graduates' personal and professional practice in Kosovo. Questioning the extent to which education abroad experience as an initiator interacts with transformative learning possibilities helps to explain the interrelationship of individual and societal change and offers insights into the role of transformative learning as facilitating individual capacity within changing societies. In this way, this study contributes to the understanding of the dynamics of context and relationships affecting both individual change and agency, and change in larger systems (Wilson and Kiely, 2002, Taylor, 2009).

Theoretical Framework
This research understands transformative learning as a gradual process of challenge, reflection, and change that integrates personal, social, and cultural realities. The process takes place over time and not necessarily in sequential phases as described by Mezirow (1991). Individuals are understood as agentic actors who communicate, interact, and act in ways that involve intuition, reflection, decision-making, and purposeful action. It is argued here that the outcome of transformative learning is the re-shaping of identity. Identity is defined as a "process of identification" or knowing who we and others are through comparison of similarities and differences in the "human world" consisting of individual, interactional, and institutional order, interacting simultaneously in time and space (Jenkins, 2008, p. 5).

The research design has been influenced by the experience of the researcher, a Kosovo graduate with study abroad experience. While Mezirow's theory of transformative learning conceptualized interview questions, the study does not attempt to verify Mezirow's 10 phases or other approaches; rather it aims to explain the research problem

through participants' meaning-making of lived experiences. Along the level of human systems, the research is situated within the individual and the ways in which the individual engages in transformational learning to bring about new ways of knowing, doing, and being. The research explores four important issues in understanding the dynamic nature of transformative learning: 1) its gradual process; 2) the contribution of study abroad experience in transforming self-identity; 3) transformational learning as agentic and 4) the context of the ordinary setting.

Methodology

For this phase of my research, thirty students were selected from approximately 170 Kosovan scholarship beneficiaries who completed postgraduate studies in UK universities between 2000 and 2011. A combination of snowball techniques and consultation of the scholarship database was utilized to identify participants. In 2011, a participation request was sent to 170 potential (Riinvest, 2011). Out of 43 respondents, 30 responded positively to the researcher's request to participate. The sample, drawn from willing participants is thus, self-selective. Other selection criteria included: 1) time spent abroad (more than one year) and 2) the period of return (more than six months and less than 10 years). This latter criterion was chosen to enable learners to reflect more critically after experiences of reintegration, thus recognizing that transformation processes take time and are not straightforward (Moore, 2005, King and Kitchener, 2010).

Active interviewing (Holstein and Gubrium, 1995) was adopted as the most appropriate methodology; it facilitated participants in capturing their integration of experiences through retrospective accounts of studying abroad and by drawing comparisons with Kosovan educational, social, cultural, and political contexts. During this initial phase of research, sixteen individual narratives were analyzed and data were compared across participants. Data analysis is organized into three settings: Kosovo experience, UK experience and Re-integration experience.

Table 1 Participants

Nr	Age	Gender	Level	Field	Workplace
1	34	M	MA	Statistics	Public Institution
2	24	F	MA	Management and Environment	Private Business
3	28	F	MA	Management and Environment	Kosovo Government/NGO
4	32	M	MA	Management	Kosovo Government
5	35	F	MA	Gender Developement and Globalization	Think Tank/ Kosovo Government
6	38	F	MA	Media Communication	Private Owned Enterprise
7	36	M	MSc/ PhD	Economics	Financial Sector/ Private
8	32	M	MSc/ PhD	Economics	Financial Sector/ Private /Research Institute/Private College
9	28	M	MSc	Economics	Private College
10	33	M	MSc	Economics	Financial Sector/ Public
11	24	F	MSc	Economics	Financial Sector/ Public
12	29	M	MA	European Studies	Kosovo Government
13	23	F	MSc	Economics	Kosovo Government
14	29	M	MSc/ PhD	Economics	Research Institute
15	40	F	PhD	Education	Public University/ NGO
16	30	F	MA	European Studies	Political Party

Results and Discussion

Kosovo Experience

The structure, organization, curriculum and practice of educational policies in Kosovo are shaped by social and political context of oppression, ideology, war and international intervention. Thus, education in Kosovo has a history of centralized and politically controlled governmental interventions shaping curriculum values, rationale, and educational experience, promoting and constructing certain kinds of knowledge and certain types of learners. Crises and transitions of the society are embedded in participants' individual experience as entangled interaction (Jenkins, 2008).

Data analysis of the Kosovo experience conveys three dimensions in participants' experience. One is related to the type of school and what learning it promotes. The second is related to the duality of realities in transition society. The third reveals the role of teachers in the learning process. The education of participants from primary to the university level ranges in the period between the 1980s up to 2010 depending on their age. Their

experience includes education under socialism in the 1980s, parallel system of 1990s, interruptions by 1999 war as well as post-war attendance. In most cases, learning is characterized by large classes, traditional teaching that stimulates accumulation of knowledge and oral mechanical reproduction of what was taught in class or from very limited resources, especially during 1990s. The school system is based on authoritative teaching and interpretation of learning. Participants recount how they lacked writing activities and critical thinking; learning was about absorbing information and not thinking and questioning. Despite individual psychological, cognitive, and language ability differences among students, the overly politicized and authoritative education experience is perceived as compromising learning spaces, autonomy, and agency among learners.

Respondents recount that learning environments promote the banking concept of education. Experiences are described as "not benefiting from lectures,", "not heard," "limited," and "not challenging" while professors are described as "distant," "not caring," and authoritative". Public education curricula do not match societal changes triggered by post-war transition and do not engender challenging learning environments. For example, before the war economics curricula focused in the socialist political economy. After the war, many curricula remained unchanged leaving participants' experience straddling socialist human resources perspectives and modern economic concepts. Only in some cases of modern departments or private schools did different experiences directly influence participants' future experience in the U.K. For example, at the newly established departments, the reformation included new staff members, foreign experiences, foreign professors, and Kosovo professors who studied and lived abroad. They implemented new curricula, new teaching and evaluation methods as well as building student-teacher relationships.

Research data so far indicate that the majority of participants operate within a shared frame of reference that acts as a limitation and distortion of the way they learn. For example, several students believe that effective memorisation is needed to succeed at school and that the correct information only comes from authority (teacher or book). On the one hand, some respondents recount how they strive for recognition, but rather than challenging through argument and rhetoric, they strive to fit in. The questioning of this frame to a certain extent is present only with three participants. They recognize different sources of information and different truths, but they obey authority when it comes to evaluation by conforming. They strive to express their questioning through   creativity and meaning-making in the arts, or power structures and other circumstances that fulfil intellectual curiosity and creativity.

Most participants personify the 'good' student, eager to learn and compete but not necessarily confident. The participants are "a product of a gap" or flow in the education system in Kosovo(Lin and Cranton, 2005). Their behavior is prescribed by the prevailing oppressive conditions and banking education style in the Kosovo social and cultural reality. Most participants are motivated to study abroad by the promise of a better education and better career prospects. Interestingly, three participants mention challenge, reaffirmation and independence as their reasons for wishing to study abroad. Thus, the study abroad intention is an urge to explore and escape from isolation and limitation. Consequently, all participants in the study are active actors engaged in changing their own reality. They do so by forming student organizations, joining learning groups and NGOs, returning to education, changing jobs, and changing career orientation.

UK Experience
Study abroad experience provides transformative learning opportunities for learners because of the new social and cultural environment in which they begin to operate. Previous research on transformative learning supports the view that studying in unfamiliar environments is more likely to support transformative learning (Gu, 2009, Brock, 2011, King, 2009, Taylor, 2008). Learners are exposed to challenging study requirements and learning opportunities different from usual and taken-for-granted circumstances in Kosovo. Universities in the UK are described by participants as modern, well-equipped and well resourced. The difference that participants first encounter is the culture of information and management of expectations as well as access to student support services. Students are surprised by an ethos of long-term planning and scheduling and access to clear guidelines for attendance, re-sitting courses and evaluation. Coming from a culture of never-ending re-sit opportunities adherence to institutional rules of attendance and deadlines necessitates cultural adjustment.

Cultural and organizational adaption is not limited to environmental factors. Illeris(2011) suggests that learning involves interaction between the learner and environment and the process of individual acquisition. New

study requirements such as independent learning, academic writing, reading multiple resources and critical thinking are contrasted with the ways students used knowledge before. Davis (2011) suggests that when moving to a different context, new knowledge acquired will transform the resident knowledge. However, he points out that it is problematic if what we know and what we can do cannot be transferred to other situations, especially if the resident knowledge is not appropriate to accommodate new learning. The new experience of most participants consists of learning in small classes, working in groups, attending tutorials, writing assignments, extensive reading and writing a thesis. Some participants recount writing about issues and self-evaluation as learning activities. Differences in learning settings and environments, allow questioning, discussion, and interactive learning.

According to Mezirow (1991), learning is a process in which we construe meaning through using prior interpretation and revision of that interpretation when encountering a new context. A disorienting dilemma resulting from the UK experience is initiated by negative and positive events. For example, for some the new encounter is accompanied with feelings of inferiority and humbling. Their self image of best student is destroyed, and their basic assumptions about their skills, such as English, learning abilities, analysis, and writing, are put into question. For those who have attended private schooling or newly established departments with more modern teaching, learning and evaluation methods, the academic challenge is not dramatic; rather it serves as expansion and reaffirmation.

When assessing assumptions, learners question their attitudes, feelings, beliefs and how they know, judge, and use knowledge. This questioning involves three main processes: learner-environment interaction, individual learning, and construing beliefs while in dialogue.

Table 2 Questioning processes

Interaction with environment	Individual learning	Construing beliefs in dialogue with others
What is expected from me and when?	How do I function here?	Where do I position myself in economic schools, what are my economic professional beliefs and why?
What are the requirements?	How can I get support?	
What is the difference in evaluation and how do I respond to it?	What can I do to activate myself?	
	How do I communicate with teachers?	What are my teaching beliefs and why?
What is the writing system in the UK and why?	What and how am I reading now?	How do I engage in dialogue with the literature? Why is it important?
Are others experiencing the same thing/is this shared?	How do you generate an idea?	
What does it mean to be free to question and in what conditions?	How do you generate information?	How do I create my own voice? Why is it important?
What is the difference in teachers and teaching approach?	How do you transform information in your own idea?	What are my ontological assumptions and why?
What is the influence of my private schooling on the educational experience in the UK? What is the role of the individual in the collective?	How do you use scientific, academic, and educational tools in your research?	Why is my writing not critical enough/what is critical thinking? Why is it important?
How relevant is my education in Kosovo in comparison to the UK experience?	How do I use my narrative talent in the research process?	How do you build authority as a teacher?
What are the areas we are lagging behind from European students and why?	How can feedback help in improving learning?	How can one apply environmental policies and strategies from the UK in Kosovo?
How are communities organized in the UK?		

In interacting with the new environment, students reflect about study requirements, communication style, communication nature, learning gaps, learning differences, and learner role by comparing experiences in context. During the process of individual learning, students question the way they function, read, think, and write, and new

ways to use, create, and communicate ideas. They also explore the possibilities of implementing learning and behavior in different contexts and evaluating the tools they use in their efforts to perform. In the process of constructing beliefs, the exploration of new alternatives, new ways of knowing and being as well as awareness of the nature, sources, and consequences of old beliefs are put in the wider perspective of others.

Participants experience a shift in how they know and use knowledge; however this is not the same in intensity and level for all learners. Some learners achieve means for self-expression gradually; for others the change is immediate. Reading and writing facilitate expression of opinions and creation of meaning, thus bringing new interpretations of knowledge and actions. Participants engage in problem-solving activities, such as negotiating behavioral norms, improving English skills, and researching information. They learn new skills, such as searching and using the library, referencing, paraphrasing, and essay writing. They also talk about their concerns, share experiences, ask for help, and create relationships with peers and teachers. The most significant action on new perspectives is learning how to read, write, create self-style, and bring one's own voice. Participants cannot completely detach themselves from the Kosovo context and expectations. They describe the questioning, construction, and changing of professional beliefs as a dynamic process. They re-shape beliefs on what learning is about: not taking things for granted, finding ways to address problems and taking a position, searching and communicating their own voice, working in interaction, and assuming responsibility as a learner and a professional.

Reintegration

Reintegration of participants is accompanied with positive and negative feelings and as a process of adjustment guided by the new meaning perspectives .They perceive improved employment opportunities as foreign educational qualifications are valued more than Kosovo qualifications (UNDP, 2006). Recent research on highly skilled returnees in Kosovo has indicated high percentage employment rates, with government agencies and public institutions being the highest, followed by international institutions, universities and financial sector (Qirezi, 2011).The high percentage rate in the public sector is due to contract obligations especially with the EU scholarship scheme. There are also combinations of a fulltime job with teaching jobs either at public or private higher education sector.

Respondents express how when returning to previous jobs, they felt proud and confident and they perceived feeling more valuable and competent. They feel enriched and motivated to contribute towards improvements in their workplace. In contrast, those returning to new jobs in the public sector with contract obligation feel trapped in "invented posts" to fit in the returnee profile. In most cases, their job does not match their skills and are not demanding, interesting and challenging. Their experience is situated within the weak performance style of the public administration (European Commission, 2010). Better financial opportunities and more interesting jobs make them leave the sector. However others express satisfaction with their current work in the public sector; this is evidenced by jobs with more responsibility and within academic institutions. In general all participants irrespective of where they work experience a duality either within institutions, or within the society. Taking a different perspective puts them into a situation when they critically reflect on their role in the family, at work or even in the society.

While they continue to question their professional beliefs and their relationship with the workplace and within society, respondents express how they validate their beliefs with friends and family. All interactions are underpinned by efforts to integrate new beliefs with traditional values. Respondents consider power, support and recognition issues when they undertake actions. Participants describe these conditions and the negotiation process with metaphors such as: 'Limbo', 'Battle', 'Highway', 'Chaos' and 'Mosaic'. Limbo refers to a 'helpless situation where you are trapped and cannot get out'. Participants in this group see themselves as either 'critical, 'confident,' or 'caring' voices from Limbo. The "Battle" metaphor is about operating in warlike situations where all skills such as attack, retreat and surrender are necessary to survive. So participants in this category use the 'accommodation skill' to negotiate survival. The "Highway" metaphor is put in the context of Kosovo. A Kosovo Highway is not like western highways, because there are obstacles and other people crossing the street. Participants in this group are determined to reach their destination regardless of all barriers and obstacles confronted, because obstacles are temporary and can be avoided by cautious driving. The other metaphor is "Chaos," where participants represent the most pessimistic group wondering how they are going to take responsibilities when their rights and work are not recognised. They reflect on rights and obligations at the level of individual and state. They believe that without improving the legal and organizational environment there is no hope for changes in the Kosovan society. The

metaphor of "Mosaic" refers to little acts of individuals as little pieces in the mosaic. Small change is possible from one person, but greater change is possible from the efforts of many. .

The data reveal a re-shape of identity. The image of best student is replaced with confident student, independent, creative, authentic and reaffirmed as culturally equal and capable. They also reveal new ways of relating to teachers; the idea of authoritative teachers who are distant and do not want students to think, is replaced with that of an engaging, supportive, and friendly teachers who at the same time are demanding and encourage students to think for themselves. Relationships with peers, teachers, and significant others are strengthened. In addition, there is also a move from being passive to being active in asking for help when needed and working with friends and creating networks. Participants implement new perspective in places and spaces where they have autonomy and influence. They apply new teaching and evaluation methods, introduce new courses, curricula and study approaches. They support students in writing and self expression activities. They construct new relationships based on the new perspectives. They share experiences with like minded people and build alliances. Some participants become politically active or engage in public discourse in the form of writing.

The most important finding in the reintegration of participants' experiences and implementation of change in organisation is the influence of relationships in the workplace environment and recognition. Recognition plays an important role in self-relatedness (Fleming, 2011). For example, where participants work with like minded people, recognition within the group and within the organisation contributes to a sense of self realization , motivation and agency. In cases where they work with like minded people but are not recognised at the level of organisation, their focus and influence remains in the group, and the level of implementation of their experience is dependent on group organisation and agency. In cases when they are recognised as experts but do not fit in a group within the organisation, they face more obstacles in implementation of their experience.

Conclusion

For participants in this research, study abroad is more than acquiring skills and adjusting to cultural specific requirements; it is a journey of understanding of self and of negotiation of identity in duality of realities. It is through interaction that participants reshape their identities. This is expressed in the form of dialogue or discussion with literature authors, peers, teachers and other actors, differentiating self from others and evaluating, learning and practicing new ways of communication. This study concludes that the process of transformation is guided by personal and environmental factors and that it is not the same for all learners. In spite of actions to nurture critical perspectives and to re-shape their role as learners and workers, the level and nature of action taken by learners in UK and upon return to Kosovo depends on the extent to which participants have transformed and on workplace factors that influence their agency.

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Transformative Learning to Develop Strategic Insight in Management / Organization and Leadership Education

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Abstract

Globalization amplified by technology has increased the complexity of our socio-economic-political landscape. The need of the hour is for leaders to develop mindsets that enhance their ability to address challenges characterized by ambiguity and uncertainty. The challenge for graduate programs is to create pedagogies designed to develop these capabilities through transformative learning experiences. This research seeks to understand the experience of graduate students in courses using action learning (AL) in seeking to address this developmental challenge. Students develop awareness of how their mindset facilitates or inhibits their ability to work through ambiguous challenges that are currently confronting them.

Keywords

Action learning; constructive developmental theory; developmental action inquiry; strategic thinking; developmental capacity; leadership development; management education

Introduction

Our socio-economic-political context is strikingly different from what it was 40 years ago. Technology and globalization have driven an increase in the level of complexity (Courtney, Kirkland, & Viguerie, 1997; Sargut & McGrath, 2011; Taylor, 2001). In order to manage and succeed in this environment, today's leaders and managers need to build their leadership capability and develop a mindset that can embrace the ambiguity and uncertainty that defines this environment. In an age of increasingly changing landscapes in which organizations are highly networked, building leadership and strategic learning capability is no longer the sole prerogative of the Human Resource Development or Talent Management function. Rather, academic institutions need to prepare students, through action and reflection, to operate as successful leaders in this complex world.

We argue that in order for graduate programs to remain relevant and partner in the development of leaders who are prepared to meet the challenges of a global economy marked by complexity and ambiguity, pedagogy should be designed to develop students' capacities by creating potentially transformative learning experiences. Mezirow (2000) conceived of transformative learning as the process by which we "transform our taken-for-granted frames of references . . . to make them more inclusive, discriminating, open, emotionally capable of change, and reflective" (p. 8) through constructive discourse with others. The traditional teacher-centered classroom in which students are passive receivers of information from an expert does not give students the opportunity to challenge assumptions, offer their own interpretations or engage in discourse. This research is an effort to understand the experience of graduate students in courses that use action learning (AL) as part of a potentially transformative teaching methodology that intends to increase capacity for critical reflection while drawing on the value of experiential learning practices to help students operate more successfully under conditions of complexity and ambiguity.

Purpose

The purpose of this qualitative case study is to better understand the use of action learning pedagogy in conjunction with specific learning tools and mindset capacity building for developing leadership in graduate students. This study applies the theoretical framework presented by Yorks and Nicolaides (2012) to data gathered from students who took the course *Strategy Development as a Learning Process* from 2009 to 2011. This course asks students to apply action learning methodology to a personal, on-going strategic challenge. The intended impact is an increased awareness of the *internal system* of how participants sit in relationship to their challenge and the *external system* of relationships and dynamics that impacts these challenges (Nicolaides and Yorks, 2008).

Pedagogical Design of Course

Action Inquiry and Action Learning

Marquardt, Leonard and Freedman (2009) note that action learning is increasingly utilized as a learning methodology in professional graduate schools. This reflects an awareness of the increased pressure for students to gain not only content knowledge, but also an ability to learn from experience. Action learning (AL) can be described as a structured learning initiative that privileges learning through experience using cycles of action and reflection with the purpose of making progress on a real challenge and developing insight (e.g. Marquardt, et. al., 2009; Revans, 1978. Yorks and Marsick (2000) note that AL can produce transformative learning through a focus on both task and learning dimensions.

Dialogue, Analogies and Scenarios

The strategic learning practices of dialogue (Hardy, Palmer, & Phillips, 2000), analogue reasoning (Gevetti, Levinthal, & Rifkin, 2005) and scenario learning (Fahey & Randall, 1998; Wack, 1985) have been described at length in the strategy literature and will be considered here as methods that may a) support reflective practice, b) surface and challenge assumptions and c) reframe challenges.

Informed dialogue requires an intent to understand others and relevant data, risky dialogue involves testing deeply embedded assumptions and critical dialogue requires alternative perspectives that may compel us to reflect on our own thinking or decisions (Sloan, 2006). Dialogue can be considered the undergirding skill for all of these strategic learning practices, as it is requisite for critical reflection and the ability to challenge one's assumptions and resulting frames of reference. Mezirow (2000) refers to the use of reflective discourse, or "a specialized use of dialogue" (p. 10) as a means of encouraging transformative learning. Marquardt, et al. (2009) acknowledge the importance that students develop this capacity while in graduate professional schools and implement it successfully in their professional contexts.

Reasoning from analogies is the thinking process through which persons, when faced with an unfamiliar challenge, think back to some similar situation they have experienced or heard about, draw lessons from it and apply these lessons to the current situation (Gavetti, Levinthal, & Rivkin, 2005). Many times people subconsciously engage in reasoning from analogies when improvising from their experiences. Seeking to make these analogies explicit through dialogue is a way of both valuing experience and remaining aware of the potential barriers to new insight.

According to Illbury and Sunter (2001), scenarios are "stories that unfold in a sequentially organized manor . . . [and] can be viewed as multiple pathways into the future" (p. 41). Wack (1980) offers two criteria for helpful scenarios, 1) "they are based on a sound analysis of reality" and 2) "change . . . assumptions about how the world works" (p. 74).

The use of dialogue, analogue reasoning and scenario learning becomes even more critical under conditions of complexity and ambiguity when future outcomes cannot be predicted. One's actions will likely provoke unanticipated changes in the system that require continuous learning through; we argue that one's ability to manage complexity and ambiguity will affect the success of his or her interventions and ability to learn while engaged in the action. Awareness of action logics may be an influential developmental tool in increasing tolerance for these conditions while allowing participants to more effectively use these strategic learning tools to achieve desired outcomes.

Class Description

In this semester long course with a focus on strategic learning, students are exposed to core frameworks in the strategic learning literature and particular focus is given to developing an awareness of their action logics (Torbert, 2004). Action logics refer to one's dominant way of thinking and shape one's actions. Torbert (2004) identifies seven action logics: opportunists, diplomat, expert, achiever, individualist, strategist, alchemist and ironist that form a developmental progression in terms how one is in epistemological relationship with the world around them and how they deal with uncertainty.

By the fifth class, students bring a 10 page description of a personal strategic challenge marked by complexity and ambiguity for which reasonable people may disagree upon the appropriate course of action. Many of these cases deal with career challenges given current economic circumstances. At this point, students are placed in action learning groups; the remainder of the course is divided between work in these groups and the introduction of strategic learning frameworks.

Methodology

The data were collected over three years from participants who attended the course *Strategy Development as a Learning Process* held in fall of 2009, 2010 and 2011. Each of these classes were compromised of approximately 25 students. In writing this paper, we used data from three sources: final application papers, structured interviews and focus groups. The final application paper is an assignment that requires participants to discuss whether and how their approach to their personal strategic challenge changed throughout the semester. More specifically the paper discusses the underlying assumptions students were holding and how these were tested; whether and how the challenge was reframed, and the process of reframing; the learning concepts and frameworks that assisted in reframing; and finally, the action plan moving forward.

The process of collecting data from these papers was structured in the following manner. First the professor read the papers and later they were reread by two graduate assistants. Next, the papers were coded and the various themes that emerged were recorded and discussed. The focus group was conducted mainly to validate the themes that emerged through the interviews and the papers. Once the themes were collated, the frequency of these themes was collated. Based on the frequency of the themes we have presented our findings to address the issue at hand.

Findings

1. All of the students (100%) reported that small group processes aided their strategic learning.
The small group processes were reported by all of the students to have aided their strategic learning. Several students described a change from the initial, tentative and relatively superficial group interactions to a collaborative, inquiry-based approach as the semester went on. The following excerpts from two students illustrate this shift:

In our small groups we initially tended to demonstrate problem solving versus strategic thinking . . . [later] we each lent a varying perspective to each other's challenge due to our diversity of cultures, backgrounds and experiences which was for me the most important part of the process.

In the beginning . . . I was a bit disappointed by the other members in my group . . . after this experience, I became aware of the importance of diversity when learning to think strategically which requires embracing other's unique experiences . . . we were extremely dedicated to the process and sincerely interested in one another. As a result the level of trust, honesty and dialog were high and all of us were able to make moves in addressing our challenges.

Student A described the value of the group process in terms of hearing diverse viewpoints that challenged some of her assumptions around career achievement, while Student B described the value of diverse perspectives and experiences.

Several students also noted the value of developing trust among group participants and how this allowed for valuable dialogue to emerge, which may have allowed group members to move forward with their strategic challenge. Student C described the group process this way:

Every time I had meetings with my peer group in class, we came up with different ideas and fresh views and I have felt, "Oh my God, how did I not know that already? How did I not think of this already?" . . . [This] allowed me to think differently than before and I could make progress in terms of dealing with my situation with new thoughts and hope of new possibilities. In that sense, having different views and ideas from my peer group was the most valuable lesson. I got to get out of [my] little thinking box through this course.

Students described the ways in which the group process helped them to surface assumptions and open up their thinking about the challenge. Participants described the group process as supporting their strategic learning by offering diverse perspectives, creating space to challenge assumptions through inquiry and creating a climate of trust and support.

2. All of the students (100%) reported that challenging their assumptions contributed to a deeper understanding of their challenge.

The process of challenging assumptions resulted in a deeper understanding of the challenge for one hundred percent of the students. Several described the process of surfacing and challenging assumptions as an opportunity to see their challenge from different perspectives, which resulted in the ability to think more strategically.

Although some students may have had some awareness of previously held assumptions, this process illuminated the impact of these assumptions for some participants:

> I think the most significant difference I have had through this class is . . . my RECOGNITION OF ASSUMPTIONS. I now see how I tend to develop assumptions that devalue my abilities or competencies . . . [and] situations where I can succeed . . . I have received feedback from my family and friends in the past . . . However, this group experience was like holding a mirror to my face and seeing how assumptions affect my decision making.

Similarly, Student D described surfacing her assumptions as integral to developing her strategic learning:

> [This] class . . . helped me to recognize what assumptions are operating within me and how they can hinder the process of moving forward and thinking strategically about it . . . I have come to realize that while the same challenge may present itself to many people, the implication can be very different for each individual.

The process of communicating about the challenge offered students the opportunity to surface some assumptions and the ongoing group dialogue created space to begin to challenge those assumptions.

3. A large majority of students (90.5%) reported that they reframed the way they thought about their personal challenge.

Reframing their personal challenge was noted as a course outcome by a majority of students. Several students noted that this reframing often broadened the scope of the original challenge or shifted the challenge from the professional to personal realm. Student E described this shift this way, "Ultimately I was able to reframe my problem more in the personal realm as opposed to that in the professional realm and recognize that a big part of my challenge was due to certain interpersonal assumptions that I hold." Similarly, Student F described reframing her challenge in the personal realm:

> I have reframed my challenge as well as the context and scope. It has become more of a personal challenge and is now broader in scope. I used a very specific lens, which is my cultural lens when I was writing and interpreting my challenge. I have reframed it using . . . a multiplicity of cultural frames to make me a more fluid person to achieve what I am truly committed to. This fluidity will help me address my specific challenge and also aid me in addressing any situation I am faced with which demands adaptability.

Like Student E, Student F described expanding the application of her learning to contexts similar to that of the original challenge. Reframing gave students a broader view of their options, which resulted in an increased sense of efficacy in the process of decision-making.

4. A large majority of students (79.4%) reported an increased awareness of their discomfort with ambiguity and a desire to become more comfortable under conditions marked by uncertainty and complexity.

Students became more aware of their discomfort with ambiguity and developed a desire to become more comfortable in ambiguous situations. Several students described a) being better able to tolerate not knowing how a situation may turn out, b) using dialogue to explore this ambiguity and c) feeling confident in their ability to operate under conditions they recognize as ambiguous. Student G describes the emergence of this shift:

> I realized [that] . . . it is okay not to know the answers; it is okay to admit that I do not have all the answers; and it is okay to openly discover the answer with others through dialog. In a way, it empowered me to seek out new questions.

Student G elaborated on how she used dialogue to develop her comfort with uncertainty:

> I still have the tendency to ask the "how" question instead of the "why" question but have started to observe myself (reflection-in action) during meetings as I ask questions . . . It felt somehow awkward, but at the same time, the possibilities to explore became broader.

Student I described her process similarly, "Having a greater awareness of ambiguity and how it contributes to emerging strategy and innovative thinking has helped me to become more comfortable with the idea."

While participants may not have reached a level in which they are entirely comfortable with uncertainty, their awareness of how they relate to ambiguity has opened up different options for acting in the face of uncertainty. Students described how the experience of remaining engaged in group dialogue increased their tolerance for ambiguity. In the words of one student:

> I learned the value of staying in the dialog, sharing assumptions, asking generative questions. I experienced the power of deep listening, exploring metaphors, and staying open for reflections. I understand now that learning through means to stay with the complexity of the inquiry, noticing the assumptions, approaching the learning experience with a kind of open mindedness and focused intentionality.

As I watch my strategic challenge continue to unfold and evolve, I came to the realization that perhaps there is no end state to this process. I understood the value of strategic thinking required the capacity to refrain from simplifying and the willingness to stay with complexity and ambiguity.

Discussion

Based on our review of the literature and the data from this study, we argue that graduate programs in management and organizational leadership should use pedagogy that creates potentially transformative learning experiences in order to increase students' capacity to meet the challenges of a global economy marked by complexity and ambiguity. It is our view that without these challenging pedagogies, students will not have the opportunity to test their taken for granted assumptions and develop more flexible frames of reference. According to Mezirow (2000) reflective discourse can support individuals in "tolerating the anxiety implicit in paradox, searching for synthesis, and reframing" (p. 13). Students' increased awareness of their intolerance for ambiguity and their stated preference to develop an increased comfort with uncertainty indicates some initial steps toward more open and reflective frames of reference (Kegan, 2000).

These data suggest that while students may not have changed their habit of mind (Mezirow 2000) or developed a more complex action logic (Torbert, 2004), their point of view toward their challenge has become more malleable and they are more aware of how their action logic can facilitate or constrain the development of new insights (Yorks & Nicolaides, 2012). The curriculum of this course encourages students to approach their problem in a completely different manner from their previous approach. Students engage in structured dialogue with their peers; through these conversations assumptions are surfaced and students have the opportunity to see their challenge from the perspective of their peers. This fits Mezirow's (1997) definition of discourse, i.e., "a dialogue devoted to assessing reasons presented in support of competing interpretations, by critically examining evidence, arguments, and alternative points of view" (p. 6). Discourse encourages critical reflection on the assumptions that underlie our habits of mind.

Conclusion

This study suggests several implications for students in professional graduate schools and professors and administrators in those schools. First, students considering professional graduate programs should ensure that programs they seek offer opportunities to engage in learning that will develop their strategic learning capacity, as this is increasingly becoming a necessary skill in organizations. Second, professors in schools of management should seek to engage students in active learning using collaborative methodologies like action learning that allow for work on real world problems without simple solutions that value diversity and encourage reflection and action toward solutions.

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Insights from International Development of Epistemological Tensions for the Transformative Learner Within a Neoliberal Environment

Gael Robertson

Abstract

This paper draws from a particular transformative learning journey where I narrate and analyse my development practitioner experiences in Nepal from 1990 until now. I interconnect micro (self), meso (local-Nepal) and macro (Global-donors) perspectives and identify epistemological tensions that arise in development practice. Firstly, tensions arise from the neoliberal demand for global standardization that does not allow responsiveness to the unpredictable and 'unique' local contexts. Secondly, I evidence dilemmas to arise as the neoliberal principle of *individualisation* demands conformity, which challenges the adult learning notion of *individuation.* My academic research contributes an understanding of transformative learning applied innovatively to the context of international development practice. Further, my research provides insight into the epistemological tensions for the transformative development practitioner to learn within a neoliberal environment.

Introduction - Be the change you want to be in the world - *Gandhi*

The scope of transformative learning theory (Mezirow 1990; 2009) gives an opportunity to utilise my development practitioner experiences to situate 'self' and 'self in context' as a case study within my research. My paper offers insight from a particular transformative learning journey where I narrate and analyse my development practitioner experiences in Nepal from 1990. More specifically, I analyse selected 'problematic frames of reference' in response to my 'disorientating dilemmas' (Mezirow 2000). By including subjectivity, I reframe understanding to reclaim space to humanise development practice. In turn, I raise 'voice' to actively promote a practice of transformative learning within international development and in Nepal.

With the growing influence of neoliberal norms, development practitioner learning is closely aligned with private sector organisational learning theory (Finger and Asún 2001; Roper and Pettit 2003). In turn, this erodes the earlier influence of adult learning in development practice (Freire 1970). Increasing epistemological tensions arise to bring ethical considerations into what can be described as "messes" in practice (Schön 1983, p. 42). A particular ethical question is raised by Duffield (2007, p. 233), which is concerned with whose learning is of first importance in development. He argues that "instead of educating the poor and marginalised, it is more a question of learning from their struggle for existence, identity and dignity and together challenging the world we live in". I concur with Duffield and for this reason in my research, I focus on individual development practitioner learning. Within this context epistemological tension arises as the development practitioner is challenged to comply with the neoliberal demand for "individualisation" (Harvey 2005, p.23) in opposition to the adult learning notion of "individuation, as the development of the person" (Cranton 2000, p. 189). *Individuation* promotes independent thought to allow the learner to contribute authoritatively an opinion of 'self', whereas, *individualisation* commonly requires a learner to be responsible for their learning, yet comply with institutionally permitted boundaries.

Context

My learning milieu in Nepal demonstrates that modernity is weakly positioned to engage with local knowledge. Neoliberal principles demand compliance with global development blueprints rather than allowing responsiveness to the unpredictable and unique local context. Like Escobar (1995) I challenge the professionalisation of development that results in dehumanising and neutralising development. Context, particularly contextual dynamics, is a key element in transformative learning (Taylor 2009). With an understanding of 'self' as the development practitioner in context, the practitioner is positioned to negotiate ethically sensitive routes within the "risk society" (Beck 2004) that is an increasingly common locus for global development practice (OECD 2010).

Epistemological tension for the transformative learner

The underpinning motivation of globalisation arises from neoliberal principles of individualisation, economic growth, privatisation and deregulation (Giddens 2002; Harvey 2005). Globalisation impacts across the globe and its authority is not just the dominance of the west over the rest since it affects the west. The revolutionary nature of globalisation involves not only economics but all aspects of life including politics, technology, education and culture. Enhanced communication, in particular television, mobile phones and social

media has been significant means of spreading globalisation. The macro impact of individualisation erodes opportunities for person centred development practice thereby excluding micro subjective 'self'. The 'fostering' of a "holistic orientation" (Taylor 2009, p. 10) to transformative learning in development practice creates opportunity to understand more about macro-meso-micro interactions that interconnect the whole of what is commonly viewed as the fragmented 'risk society'.

Individualisation within the broader context of adult learning requires attention. Firstly, it is the liberalisation of traditional practices that result in an individual's search for new identities. Secondly, individualisation requires people to assume responsibility for tasks for which they are not well prepared or which are beyond their ability. As a result, "coercion and humiliation" rather than "liberation and empowerment" occurs (Jansen and van der Veen 2000, p.127). Thirdly, as a consequence of individualisation the societal institutions that have historically created a common consciousness of values and provided personal support are disallowed as credible by the neoliberal paradigm. Consequently, making meaning of life experiences increasingly becomes a private matter. Finally, individualisation processes can, with varying pace, lead to new forms of social inequality. Saith (2011) suggests that these inequalities carry an escalating intensity on the socio-political aspects to create the affect of two societies with in one country. Inequality is no longer the fate of certain classes/castes in society. Rather "globalisation has been accompanied by worsening inequalities" (Saith 2011, p. 70) and changing norms.

My learning journey

The learning journey that led eventually to my research was triggered by a series of *disorientating dilemmas*. Bewildered in development practice, feeling alone I was unable to make much sense of directives to change being handed down from donor directives. Simultaneously, I experienced a disconnection of donor led development from local knowledge. I questioned the learning taking place within development practice and become more fascinated about my learning with a *self examination*. At this point, I became more intrigued by *disconnections* between international development, Nepal's social system practices and my contextual interactions. To understand more about my disorientations I took responsibility for 'self' and chose to take new *action* to enter academic study for deeper *self examination* in a Masters degree. This Master's degree in education opened up the vista of adult learning to value experience. During this study, I *developed confidence and experienced pleasure* in learning as with deeper understanding I made *connections* for 'self' and 'self within context'. Nonetheless, at the completion of this study I was left with further questions. Within academic study, I developed self-belief with a desire to analyse in depth in order to learn from my experiences. In turn, *this leads me into the learning journey of my research*. My motivation to undertake further study, derives from an interest in learning from experiences; for the benefit of 'self' and for development practice and Nepal. I use Mezirow's transformative learning phases as the framework to make sense of and analyse selected experiences.

Finding my way

Transformative learning theory legitimises the evidence arising from my analysis of experiences in development practice The data analysed within my research is drawn from 20 years day to day development practitioner experience that was in the words of Boud and Walker "typically haphazard and unplanned, and difficult or impossible … to control" (1990, p. 61). For over nine years I pursued my research with "unbending intent" which "means not shirking its difficulties" (Brew 2001, p.60). The difficulties in my research stem from my lifelong academic practice tensions. Transformative learning provided scope to address these difficulties; it acknowledges intuition and emotion as well as interconnecting micro, meso and macro levels of context.

In response to a reflexive critical analysis of my assumptions and their subsequent transformation, my research contributes to "a more dependable" (Mezirow 2009, p. 30) and seldom heard account of development practice where I "respect my own voice" (Finlay and Gough 2003, p. 23). The reconstructive nature of transformative learning provides the opportunity to apply a reflexive meta-analysis to my individual learning experiences. This allows the development practitioner to negotiate within the 'risk society' involving deeper comprehension of the parts in relation to the wider context. Transformative learning also offers scope to be imaginative and creative; to interact with the "complexity of the learning milieu" (Boud and Walker 1990, p. 65) where learning is "an embodied experience and becoming one that evokes the soul, […] immersing oneself into the experience and becoming one with the learning" (Mezirow and Jarecke 2009, p.283).

Ethical considerations

I undertake a systematic assessment, to consider ethical dilemmas as part of transformative learning's iterative process, about how knowledge is used and why it is used in relation to particular power dynamics. Transformative learning supports the development practitioner as s/he confronts and deals with inconsistencies.

Ethical considerations as part of individuation in learning promotes a responsibility towards 'self' as well as to others to manage neoliberal power. My ethical negotiation with 'self' assists me to identify what I can comply with and also knowing with what and when to resist.

My 'frames of reference' in 'disorientating dilemmas'

Within this section I situate 'self' into the research in tracing my learning journey that starts in Scotland and moves to Nepal. I draw from my "historical consciousness" (McLeod 2001, p. 202) and analyse my 'frames of reference'. The underpinning authority arises from; Scottish Presbyterianism, surviving the education system in Scotland, gender discrimination, exercising freedom with intense intuitive practice both locally and nationally, encountering poverty and social injustice west and east and all in the context of a profoundly emotional relationship with Nepal that commenced in the UK in 1969. Hence, I arrived in Nepal in January 1990 not as an empty vessel but as a woman with experience and 'frames of reference' prompting curiosity to understand my new context Nepal and development practice. Then, I identify experiences where I encounter "disorientating dilemmas" (Mezirow 1990, p.14) resulting from 'problematic frames of reference'. I analyse my 'disorientating dilemmas' arising from academic practice tension, gender, the neoliberal turn and Nepal and these provide the experiences upon which I build my transformative learning throughout my research.

To understand 'self' and 'self in context' I situate the transformation of my experiences into learning in the midst of a lifelong "insatiable curiosity" (Rogers 1969, p. 3). Therefore, my research is a particular learning journey within a lifetime of inquisitiveness and of, my repeated questioning 'why', in order to be able to understand and to learn. The genesis of my reflective practices, I can trace back to my babyhood. I exhibited a curiosity trait. My mother recalls that I would engage in amazing contortions in my pram to find out what was going on 360 degrees around me.

Shaping values

I turn to my values that "contribute to our sense of self" as a force for good to direct personal actions (Mowles 2008, p. 9). My personal values are an influential guide which derives authority from Scottish Presbyterianism. Consequently, my actions, behaviours and attitudes are guided and inspired by these personal values which fall broadly into five areas; social justice, people centredness, work ethic, pioneering spirit and a search for truth (to distinguish right from wrong). However, the culture within my Scottish Presbyterian family environment was devoid of emotional language. Rather, discussions were purposeful and immersed in Christian doctrinal tensions; they were informed by intense academic theological debates, as my elder brothers studied philosophy and theology. Amidst the theological tensions, I became alienated from the academic. Nevertheless, my parents' practical actions were a powerful witness. From a very young age, I witnessed person centredness and social justice values in action. My parents' positioning reinforced stereotype gender roles but, at the time, this did not feature in my awareness. The impact of these early experiences was powerful. People centredness was a practical application before it became a theoretical concept.

Problematic frames of reference

My driving force to be in Nepal was a poignant one. Nonetheless relocating from West to East, my new environment triggered a series of 'disorientating dilemmas'. Simply taken there were many similar features yet with differences. In the market many vegetables (potatoes, carrots, tomatoes and cauliflowers) were familiar but cooked in oil and with spices they became unfamiliar yet delicious. In other situations, it was not so straightforward and, as a result, I faced 'problematic frames of reference' relating to my academic practice tensions, gender dilemmas, the neoliberal turn and Nepal. Within this paper I primarily focus on my practice academic tensions and the neoliberal turn.

On one occasion during a project review, a donor governance advisor cautioned that I was being *too philosophical to be practical*. Maybe I was, but I doubt it, as my comments were testing out my new practice confidence supported in theory. I did not respond directly to the comment. Clearly, our philosophical positions were different and a project review was not a time to challenge this. The positivist philosophical underpinning of development practice places its practitioners as 'social and economic manipulators' to facilitate change and this epistemological position is seldom questioned. Nonetheless, the project's practical approach to work with poor people and excluded communities was philosophically grounded to promote reflective practice to reframe subjectivity and objectivity. Consequently, by knowing what, why and with whom, the project staff was able to evidence their work in a diverse range of poor and excluded communities. Ironically, by advocating a different philosophical position from the donor the project was able to deliver tangible results on the donor rhetoric of *better health for poor people*. Nonetheless, the donor representative deemed exploring the philosophy of practice a counter pursuit to being practical.

The neoliberal turn

Again, I run into a further academic practice disorientation as my learning space is reduced with the advent of World Bank 'blueprint' directives. When employed by the Swiss Government confusion arose as a result of a critical incident experienced as a bolt from the blue with a top down headquarters directive for change. The change demanded was perplexing as the implication was a disconnection from local realities, which until this point had been fundamental in shaping project activities. The directive arrived by fax to a remote location, with no opportunity for an immediate explanation or discussion. Indeed an adequate explanation was never received. The consequences induced uncertainty; highlighted value differences between myself and senior managers and resulted in an emotional turmoil not only for 'self' but the project team as a whole. Suddenly language changed. The project became a 'performance centre' to work in 'partnership' and have a 'result orientation'. Business orientated words appeared which required compliance to new norms. This business orientation, to purchase services distanced the donor from local realities, became the norm. Only later, as a result of academic study, did I come to realise that this new terminology and orientation was a consequence of Switzerland's World Bank membership. The World Bank requires compliance to neoliberal norms.

Out went locally grounded learning. Also this in turn raised questions with regard to the development practitioners' roles, identities and values, as well as questions about the development game itself. Accompanying this change, I witnessed a value shift. Being a participant in the process managing the change with ensuing value conflict was both a confusing time as well as an emotionally agonizing one. Reaching burn out my values were stretched beyond a tolerable point. The environment's multiple dimensions were messy. Caught in the midst of an all male, all Swiss organisational culture, I found myself being excluded because of my gender and language as well as being enmeshed in a value conflict (Schön, 1983). Within an environment where questions received a rhetorical response only reinforced my purpose to understand more about development's changed context and gender dynamics.

Consequently, with the donor promoted neoliberal turn, Nepal's modernisation adapts accordingly. With this shift in international policy and practice developments (Harvey 2005), the new business orientation promoted greater rhetoric than genuine concern about inequalities and social inclusion. The advent of the neoliberal turn created a disorientating dilemma as I grew more concerned about Nepal and the 'risk society' and the complex reality when confronted by violent conflict, in the Maoist insurgency.

Local responsiveness ignored

I was situated in a complex and changing environment. My assumption about the neutrality and impartiality of health services is challenged. On this occasion, the State's position had shifted such that one arm of State (army) inflicted abuse on another arm of State (health workers). Consequently "managing the influence of context" (Boud and Walker 1998, p. 7) took on new meaning. I face the unpredictable as I encountered a new reality in a meeting with a health worker whom the state perceived to be partial and biased towards the insurgents. Distressed and fearful, the health worker shook visibly. His body language and especially his eyes revealed him as a traumatised victim of human rights abuse. New explicit power, exercised by state agents as well as the insurgents, adds to the complex reality. Nonetheless to witness the State's explicit abuse of power meant I experienced contradictory positions. On the one hand, I expected the state's authority to provide protection and I became disappointed in the realisation of the new reality. While on the other hand, my sense of social justice was galvanized to document the health worker's story.

On return to Kathmandu I, as the development practitioner, was aware of a new reality and I became a more overtly political player to promote social change. To understand health worker rights violations I mobilised others. Intuitively I knew that legal input was required, but was unable to articulate why. My initial suggestion to involve lawyers in health was met with scepticism by the manager. What do lawyers have to do with health?!! With lawyers involved this presented a new reality about the situation of health workers. In particular, attention was placed upon the human rights gap for junior health workers who did not have the legal status of a doctor or nurse.

Health workers rights emerged as an intuitive response on the part of being a reflective practitioner, already involved in other aspects of human rights work, to an unpredicted event. This necessitated an unplanned response to a changed micro level reality. In a paradoxical situation, I endeavour to be creative to unblock a trap of systemic modernity to find ways around the donor's inflexible global management mechanisms. Health worker rights became a ping pong ball. Resistant boundaries are established around the donor defined sectors

(health and conflict) outside which health workers rights were abandoned. The donors' human rights commitment stopped at rhetoric and was inflexible and unable to be opportunistic.

As a confident practitioner I, therefore, explore local networks and tried an unconventional route. I opened a door of possibility, to address rights violations, grounded in my understanding of local spiritual practices. But, I encounter a 'disorientating dilemma' as my perception and that of the donor advisor responsible for conflict and human rights differs. I perceived the advisor disconnected from local knowledge about the significance of the spiritual realm (subjective self). I experienced a limitation to comply with institutional neoliberal norms, and somewhat surprisingly ignoring the entrepreneurial risk taking opportunity, the donor advisor is unprepared to consider mobilising spirituality as a lever to address health workers rights.

Conclusion

The commonality in adult learning/transformative learning and international development is transformation. Yet development practitioners, at all levels, are poorly prepared to understand and to manage transformation. By placing emphasis on the transformative learning of development practitioners will promote an understanding of the realities of poverty and social injustice to advocate for global change (Duffield 2007). In turn this opens up opportunity to understand pedagogical dynamics within the neoliberal environment (Edwards and Usher 1998).

My analysis highlights a pedagogical dilemma where greater emphasis is given to individualisation rather than individuation in learning. The neoliberal environment promotes fragmentation and this challenges the whole person interconnected as a social being. Consequently, for the transformative learner in development practice epistemological tensions arise in the struggle to reclaim humanity for 'self' as well as for the humane 'self' to interact for and with humanity.

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Designing Structures for Transformation:
Facilitating Transformative-Learning Through Transpersonal Ways of Knowing

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Abstract
This conference proceeding aims to contribute to the development of transformative learning theory. Specifically we explore the *design of overarching, transformative structures* of programs and courses that include transpersonal, intuitive, creative, and embodied ways of knowing. We seek to identify significant qualities and characteristics, as well as subtle nuances within the structures of learning experiences that contribute to whole-person transformation and lead to social applications for a more sustainable world.

Keywords
Transpersonal, Whole-Person Education, Transformative Structures, Transformational Journey

Introduction
Transformative learning is inherent in transpersonal education (e.g., Braud, 2006; Netzer & Rowe, 2010; Rowe & Braud, in press) and has vast implications for adult learners, who seek personal and spiritual meaning in their life pursuits, and who wish to bring their transformed selves into service within their respective communities. Indeed, the goal for both transpersonal education and transformative learning is to bring personal authenticity, wholeness, a sense of relationship, and greater consciousness to self, community and planet (e.g., Braud 2006; Clark, 1974; O'Sullivan, 2002; McWhinney & Markos, 2003; Rowe & Braud, in press).

Our contribution to the 10th International Conference on Transformative Learning weaves transformative, transpersonal education, the virtual classroom, and creative processes with theories of transformative learning. Specifically we explore the *design of overarching, transformative structures* of programs and courses that include transpersonal, intuitive, creative, and embodied ways of knowing. We seek to identify significant qualities and characteristics, as well as subtle nuances within the structures of learning experiences that contribute to whole-person transformation and lead to social applications for a more sustainable world.

For the purposes of this discussion, we define transformation as "the process of experiencing meaningful and purposeful shifts in the ways learners perceive and process newly acquired knowledge and their own inner-knowing, by developing and integrating new awareness on personal and transpersonal levels, which is mindful, intuitive, embodied, and creatively informed" (Netzer & Rowe, 2010, p. 126). This adds a transpersonal component to O'Sullivan, Morrell, and O'Connor's definition of transformative learning (O'Sullivan, 2002). We draw on our experiences as transpersonal and creative arts educators as we explore how transformative learning can be accomplished in the virtual classroom and in person. Finally, we explore transformative education as journey and vessel, and explore the role of transpersonal ways of knowing such as intuition, imagination, creativity, connection with nature, and embodied knowing (or *expressive ways of knowing*, as referred to by Yorks & Kasl, 2006).

Transpersonal Education and Transpersonal Ways of Knowing
Transpersonal education is a form of transformative education that seeks to facilitate whole-person, community, and global transformation by integrating *processes* and *practices* grounded in transpersonal theory, world's wisdom psychologies, and spirituality (e.g., Baker, 2012; Braud, 2006; Clark, 1974; Duerr, Zajonc, & Dana, 2003; Netzer & Rowe, 2010; Rowe & Braud, in press; Sarath, 2010). Like transformative education, transpersonal education assumes that the learner is also on a personal journey of transformation (e.g., Baker, 2012; Braud 2006; Dirkx, Mezirow, & Cranton, 2006; McWhinney & Markos, 2003) and whose goal is to bring greater consciousness to, and transformation to the planet (Braud, 2006; Clark, 1974; Rowe & Braud, in press).

Transpersonal education is a holistic, expansive, growthful, transformative process that involves a both/and rather than an either/or attitude; it is experiential and reflective, inclusive and integrated. It emphasizes not only conventional forms of intellectual functioning, critical thinking, analysis, and synthesis but also the many forms of intelligence … oral dialog, pluralistic ways of knowing, and the informative and educational value of personal experience, the wisdom of the body, the great spiritual and wisdom traditions, . . . "real philosophy," poetry, myth, story, the arts, contemplative inquiry, and all forms of creative expression. It advocates a form of experiential learning that is fully and deeply lived, immediate, embodied, particular, and concrete as well as community service. (Rowe & Braud, in press)

What distinguishes transpersonal education from other forms of transformative learning modules is the inclusion of essential *transpersonal content* and *qualities,* which involve the *processes and practices* through which these qualities might be discovered or re-discovered, identified, cultivated, integrated, and applied (Rowe & Braud, in press) along with contemplative practices that inform our knowing, open us to altered or liminal space, and shift us from the inside out (Anderson & Braud, 2011; Braud, 2006; Hart, Nelson, & Puhakka (Eds.), 2000; Rowe & Braud, in press).

Ed Sarath (2003/2010) explains that transpersonal education is rooted in processes, which transcend the boundaries that separate the various spiritual pathways, and in so doing access a common ground and invites a cross-traditional exploration, inquiry, and analysis. . . .By creating a bridge between diverse spiritual practices, and between spiritual/transpersonal experience and conventional forms of knowledge, we can begin to understand how these areas both unite and differ. An entirely new educational landscape emerges that promotes unprecedented kinds of transformation and development, and helps dissolve the boundaries between spiritual pathways and other fields of knowledge that are so problematic in our world. (Sarath, 2003/2010, FAQ section, para. 4)

Barriers are dissolved and transcended as learners employ multiple ways of knowing. Transpersonal ways of knowing, that include experiences, processes, and practices, naturally open students to liminal space—that fertile space where seekers are on the threshold of new awareness (Turner, cited in McWhinney & Markos, 2003). Creating overarching structures of learning where there is a clear initiation, deepening of the experience, and celebration of ending supports this journey of transformation.

Structures for Transformation

There are many structures that support transformation. McWhinney and Markos (2003) highlight one such structure, the archetypal heroes' journey and reveal how this motif can produce paradigm shifts that are "radical, irreversible, and often unexpected" (p. 21). It is useful to consider this motif in our discussion on transformational structures and observe the components and qualities it shares with transformational structures in transpersonal education. McWhinney and Markos explain that in programs and classrooms that emulate the archetypal journey, educators create safe environments, free of political and social restraints. The journey has a clear beginning, middle, and end that facilitate transformation. These conditions and processes support and initiate change. The journey structure invites the learner into a vessel, a place that activates liminal awareness where transformation is attainable. At the end of this process learners are able to bring their newly transformed awareness (the boon) into daily life and communities.

The online Master of Transpersonal Psychology program at Sofia University provides an example of a program that emulates this journey motif. Entrance into this journey begins with students setting personal intentions and learning goals, and meeting in person to create the safety of the learning community, which includes two faculty members and a small, supportive group of peers. This supportive container allows for a gradual unfolding of psycho-spiritual processes, and learning that honors previous experiences, authenticity, and unique calling. This program is a two-year journey. The first year provides an academic foundation and is designed to bring students on a personal search through to psycho-spiritual transformation. It includes spiritual/transpersonal practices and processes that incorporate multiple ways of learning in every class, including: the creative, intellectual, embodied, ecological, diversity, spirituality, emotional, and community. Students are invited to engage in deep reflection of self-within-the-world and consider how they embody their education. With the support of their learning community, students enter a deep and grounded transformational process that culminates with a ritual celebration at the end of the first year. Students bring their newly acquired information out into the world in the second year, where they continue to expand their exploration of transpersonal, creative, and spiritual studies. The focus in this second year is on

integration and professional application. The end of their journey is celebrated through scholarly integration papers and a Showcase Portfolio that bridges their education with their work in the world.

Baker's dissertation (2012) explores the lived experience of transformation of students who went through this program, using a mixed-method approach that included surveying and interviewing alumni. Her study revealed that over 90% of participants (N=24) who responded to her survey, both students and alumni, experienced transformation, which she defined as "a profound and persistent shift toward greater wholeness and authenticity. . ." (p. iii). Their experiences of transformation came in one of the following three movements: (a) a greater realization of their essential self; (b) experiencing of greater integration and wholeness of body, mind, and spirit; and/or (c) feeling greater connection to self, others, and the natural world. They often described increased gratitude, appreciation, awareness, and presence. Baker's dissertation revealed details about the nature of the transformation and variables that contributed to this transformation.

Classroom as Transformational Vessel

This section describes three classrooms that have been designed as journeys and demonstrates how educators can embed structures and processes into their teaching so that students "walk their learning" in ways that are authentic to self and also reflect their embodied understanding of the course. We advocate continuity and purpose, so that distinct experiences are nestled within creatively arranged course outlines; when designed in the context of a program, the progressive unfolding forms the longer journey. We show how transpersonal ways of knowing encourage learners to find their authentic pathways within the learning container—thoughtfully, intuitively, imaginatively, through all the senses, and with reverence to that which remains uncharted.

In the examples below we shape our courses as utilitarian vessels, filled with learning experiences, transpersonal processes, and practices. In time, the learners outpour their transformed selves into their diverse service in the world. This process is often felt as profoundly sacred; the vessel is golden and the flow it generates is nourishing and full of potential.

The first example describes a course structure facilitated by the intuitive inquiry process as students integrate intuition, research, and creative exploration. The second example depicts the experience of immersion and indwelling in a creative process, as creative art therapy students seek to bridge the gap between their personal and professional identities as creative individuals. The third example uses the wilderness quest motif as a vehicle to embody intimacy and reciprocity within the natural world. Each incorporates intentionality and initiation into the journey, and includes meaningful reflection, transpersonal ways of knowing, and grounding into a unique contribution of service in the world.

Intuitive Inquiry as Transformational Vessel

"Inquiry into Creative and Innovative Processes" (Netzer & Rowe, 2010) is a graduate-level online course, taught at Sofia University. We sought to create a flexible container where students integrate academic knowledge and transpersonal ways of knowing, including direct experience. To that end, we adapted *intuitive inquiry* (Anderson, 2011), a transpersonal research method, as a supportive structure for students' unique assimilation of course content. Intuitive inquiry includes five successive, often iterative cycles: (a) Cycle 1, clarifying the research topic via imaginal dialogue; (b) Cycle 2, identifying preliminary lenses via engagement with the literature; (c) Cycle 3, collecting original data and preparing descriptive findings; (d) Cycle 4, transforming and refining interpretive lenses; and (e) Cycle 5, integration of findings and literature review, and discussion of theoretical implications, in which students reflect on transformational shift in awareness.

The first cycle immediately invites students into liminal space by engaging the imagination and all the senses. From there, and through the entire course, students open to personal discovery and authentic, professional applications of their learning. The intuitive inquiry structure uniquely suited our desire to bridge theory with practice in ways that honor students' knowing through their body, intellect, intuition, imagination, and unique sense of purpose, which directly contributed to the transformation of self and new awareness. This process helped students to reframe their core beliefs, shift existing viewpoints, and synthesize their new learning toward applications in their workplace.

Creative Process as Transformational Vessel

The 3-day "Multi-media Studio" workshop (Netzer, 2012) has been offered annually over the past 9 years at Hofstra University art therapy graduate program. In designing the course structure, the instructor harnessed her understanding of creative process theories (e.g., Lubart, 2001) to support students' desire to reclaim creative expression as an integral part of their lives. This studio course has aimed to balance the clinical curriculum, and inspire students to remember their own creativity as they entered the workplace. Aware of the importance of a process-oriented attitude to the freedom to create and to the authentic unfolding of a creative process (Maslow, 1962), the instructor believed that students would be more likely to experience transformation if the course structure deemphasized the completion of an art product, and rather highlighted the importance of an open, continuously evolving process with supportive, unconditional regard for the outcome. These considerations informed the formation of the course structure and the establishment of liminal space within which students were able to explore embodied connections with their creative selves.

The preparatory phase of the course, for example, includes exercises to help students shift away from a goal-oriented mindset (which mirrors a similar attitude toward treatment goals in their clinical practices). They are encouraged to immerse themselves in a variety of play-inducing media, such as clay, pliable wire, and collage materials, that can be shaped and reshaped, and layered over time. A childhood capacity to imagine and play with art media serves to heal the students' experience of a gap between the personal and professional aspects of their identities, what Maslow (1962) referred to as the *synthesis of dichotomies* or *resolution of dissonances*—integrating one's inner life with his or her work in the world. This necessitates that students allow their artworks to reveal themselves as sources of unanticipated insight rather than relying on known skills and concepts—a humbling practice that often heightens their awareness of patients' initial encounter with the art therapy process. Students are given permission to be "disorderly, sloppy, anarchic, chaotic, vague, doubtful, uncertain, indefinite, approximate, inexact, or inaccurate" (Maslow, 1962, p. 130). Periods of reflection on the value of this process and the emerging insights frame the seeming formlessness of the process and imbue it with meaning.

Wilderness Quest as Transformational Vessel

"Eco-spirituality: Our Spiritual Connection with Gaia," a 6-week virtual yet highly experiential course, utilizes the wilderness quest motif as a vessel for transformative learning. The course offers an experience of intimacy with the natural world. Students capture their growing intimacy and appreciation for nature in intuitive, expressive, earth-based, contemplative, and reflective ways and share their wisdom and stewardship as a way of embodying their new awareness. The seeker has multiple opportunities to walk onto the land with open curiosity and renew his or her connection with nature. These experiences are grounded in creative explorations and nature writing. Reflections and discussions include sharing of experiences that are lived, unique, and authentic along with discussions on relevant reading.

The wilderness journey begins with students setting intentions for how they would like to experience the natural world and selecting a meaningful spiritual practice that supports intimacy with nature. During the middle part of this course, students are asked to spend extended periods of contemplative time in nature and to refrain from scholarly reading. Instead, they read poets like Mary Oliver and nature writers like Terry Tempest Williams who write reflectively. Time on the land is contemplative. Sharing takes the form of Earth prayers, nature writing, imagery and photo-essay. The course ends by students making an offering to the earth community, passing on their new awareness, and creating their own nature experiences that they share with others. A final portfolio invites them to reflect upon how this course and their time on the land has changed or transformed their experience in the world.

Encounters with nature are not sporadically assigned in this course rather they are carefully placed to emulate the journey quality of the course. They are direct and immediate so that students are immersed in their habitat. Giving back is as natural as breathing for many of the students. They wish to return blessings they received by being in direct contact with nature. As an example, one student created a virtual nature sanctuary (http://sanctuary4humanity.com/), so that city dwellers could be in contact with nature, albeit virtually, as they sat in their offices. In the five years that this course has been offered, students have expressed deep transformation that they directly link to the course (Baker, 2012). Perhaps these personal and professional transformations were the result of their ability to connect and be with nature for extended periods of time—a practice which expands consciousness, enlivens, and opens humans to wonder and awe, and contributes to transpersonal wholeness and our spiritual deepening (Rowe, 2012).

Moving into the Future

In this paper we identified learning structures and elements that facilitate transformation by helping learners to actualize their own voice. The journey motif and image of a flowing and outpouring golden vessel emerged as we reflected on our years of experience as transpersonal educators and creative facilitators. We suggested that transpersonal education bridges barriers between cultures, spiritual traditions, and academic disciplines, and how transpersonal ways of knowing touch diverse learners and invite them to join the learning circle—enter the liminal space of the learning vessel and then outpour their new awareness into their communities. As transpersonal, transformative educators we prepare a spacious learning environment, whether in person or virtual, with trust in the process and willingness to show up authentically, ready to welcome new discovery, humbly learn from our students' wisdom, encourage their personal authority, and appreciate the hidden possibilities of new applications of learning, time and time again.

As we move into theory building for the future, we ask: How are structures of transformation like a hologram where who we are and what we do at each level reflects the journey of transformation? In other words how do we create structures for transformation that emulates our own journeys of transformation at the program, class, and activity levels? How do we fully embody and facilitate lived experiences through a transformative vessel that safeguards the process and propels change from the inside out? How do we build theories that allow us to understand the embodiment of transformative learning in various situations so that we are walking our transformation—not merely speaking about it?

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Transformational Learning for Health and Healing: A Holistic Perspective

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Abstract

We share our experiences of teaching in a graduate transdisciplinary holistic health studies program where we bring together the rational, the creative and the aesthetic to create a healing community that promotes transformational learning. We provide both theoretical grounding from transformational learning theories and theories of holism, feminism and social justice as well as practical examples from our experiences of teaching. In our classrooms we hold space for multiple paradoxes and nuances exploring the theoretical/experiential, action/reflection, conscious/unconscious and rational/creative in the process of learning and knowing.

Keywords

Transformational learning, holistic, health and healing, transdisciplinary, intuitive, critical thinking, reflection, healing community, collaboration, creative arts, imagination

Introduction

Our holistic transformational, transdisciplinary learning model emerges from the ongoing experience of developing and evolving the curriculum for a Master of Arts in Holistic Health studies program at St. Catherine University in Minneapolis, Minnesota. We are responsive to the expanding consciousness and new initiatives around holism, transformation, healing and learning, reinventing and invigorating the pedagogy of our classrooms to support healing community. We integrate holistic theories and practices with transformational learning theory and methods. In our model, holistic theories and practices involve the physical body, emotions and thoughts, spiritual beliefs and rituals, cultural identity and practices, community interconnectedness and environmental influences. Blending the work of adult learning and transformational theorists like Mezirow and Brookfield, who focus on critical thinking and reflection, with the work of Boyd and Dirkx, who look at the emotional and spiritual dimensions of learning, transformational learning theory supports the principles of holism and healing community (Brookfield, 2000; Dirkx, Mezirow, & Cranton, 2006; Dirkx, 2000).

Transformational learning theories and theories of holism – *Laurie Anderson Sathe*

In 2003, Patricia Cranton and Merv Roy discussed the integration of the two sides of the transformational learning debate as "those who view [transformational learning] as a cognitive, rational process and those who prefer an imaginative, extrarational interpretation." They concluded that rather than an "either or" approach, a "both or all" perspective can be true (Cranton & Roy, 2003). In 2005, Cranton facilitated a conversation between Mezirow and Dirkx where she concluded that the two approaches are "complementary rather than contradictory" (Dirkx, Mezirow & Cranton, 2006). We put the Masters' of Arts in Holistic Health Studies into practice in 2004, creating a program that embraces multiple approaches to transformational learning. We are responsive to the expanding consciousness and new initiatives around holism, transformation, healing and learning, reinventing and invigorating the pedagogy of our classrooms to support healing community. In our program, both the rational and the imaginative coexist in an interplay within and across classes. Students write academic research papers, create art, collaborate, engage with the community, move, meditate and sing. As they move through the program, they have the opportunity to experience transformation, graduating from the program with a renewed sense of themselves and the world around them.

An integral part of our transformational teaching model is the integration of the principles and philosophies of holism, healing, feminism and social justice. A focus on the mind, body and spirit ultimately promotes individual, as well as community, healing. Harvey Zarren writes about the Healing Community as a place "where all journey toward wellness, with all parties having joint ownership in the process and the experiences." (Zarren) As teachers, our ideal is to embody our own transformational process as we create a learning environment for students' transformational journey. We recognize that what transforms individuals can transform classrooms, and students in classrooms transform the communities in which they work and live. As individuals transform, the world around them transforms as well. At the heart of the program is the belief that ongoing opportunities for personal

empowerment and spiritual transformation prepare us to face today's challenges and to cooperate with the cultural and societal evolution of our time.

Our model resides in the domain of holistic health studies, which is transdisciplinary: it transcends the disciplines, exploring the principles of holism and the philosophy, science and art of the holistic model of health and healing outside of, within, and beyond current disciplines. We focus on health and healing in its broadest sense as we seek to apply holistic philosophy to the full range of human experience. Faculty and students come together from a variety of disciplines, creating a dynamic opportunity for creativity, learning and transformation.

All living systems co-exist as a web of interrelationships, each part inseparable from the whole. Coursework helps students make the radical shift from thinking in parts to thinking holistically. Transformation is dynamic, interconnected, and occurs in multiple levels of human systems - individual, group, organization, community, society, world, and Earth - at the same time. We start with the individual journey and create space for students to go within in a deep way. At the same time, we encourage students to look externally, critically assessing the world around them and becoming aware of emerging worldviews and opportunities for justice and healing. When change happens in one human system, it affects all other systems in a constant interplay of adapting, changing and becoming. Together, we as faculty and students experience the challenges of coming apart as we let go of the old ways, experiencing new habits of being, and bringing our learning out into the world for transformation and healing.

In our presentation, we will begin with grounding in the above theories of holism and transformational learning presented by Laurie Anderson Sathe, and then immerse ourselves in experiential learning that facilitates transformation: exploring what it means to create a holistic classroom community (presented by Janet Dahlem), a discussion of collaboration in the transformational learning process (presented by Carol Geisler) and creative practices as a way of knowing (presented by Janet Marinelli). As we will in our presentation we have each retained our own voice in this proceeding. We value our different approaches and the synergy we create together.

Genesis
By Marlene de Beer

I invite you into this space:
to become still
to go deeper within
...breathe, watch and wait
...& see what you will see

Visualize a reinvented education...
An education that integrates
the head and heart

An education that returns to and appreciates
the Aesthetics
the Beautiful
the Sacred

An education that allows
for Contemplative Space
And Transformative Practice

Creating a holistic classroom community – *Janet Dahlem*
Notice the space created with beauty at the center, music, creative arts slideshow and calm energy. Creating the physical space is an important component of what I do to create a holistic classroom learning community. A holistic classroom community is created at the intersection of transformational learning theory, theories of holism, and feminist and social justice principles.

I begin by discussing the components I use to create a holistic classroom space.

- Attention to the physical classroom space itself
- Creation of a calm, warm energy/vibration in the space
- Mindful awareness to what energy I bring as an instructor and do a self-centering exercise before I step into the classroom
- Development of classroom norms that reflect inclusivity and connectedness
- Engage students in holistic teaching learning strategies
- Establish teacher learner partnership
- Make transparent the power structure in the classroom and work to diminish this
- Recognize that all are on a transformational journey

Engage in a breath work exercise

I share holistic teaching/learning tools and techniques used throughout the curriculum in classes for different reasons. Instructors engage students in a whole range of techniques; for example, therapeutic humor, breath work, guided imagery, affirmation exercises, Qi gong, movement exercises (such as yoga, stretching), and visualization exercises. Research demonstrates many of these tools are effective to reduce stress/anxiety, increase alertness, enhance creativity, help to gain self-control, improve concentration and alertness, build connectedness, improve retention, heighten awareness, expand consciousness, establish the classroom as a holistic space, and break down myths of what it means to be in a classroom. (Fontana, 2007, Lusk, J.T. 1993, Schwartz, A.E. 1995). I also use it as a strategy to motivate students to get to class on time. I start each class with one these holistic teaching/learning tools and interject them throughout the class as needed. Halfway through the semester, I empower students to volunteer to conduct these opening "Centering" exercises helping them to see themselves as sharing responsibility for the classroom environment. I do not necessarily see myself as a funny person, so I use props and gimmicks in the classroom to teach a difficult subject or to reduce anxiety.

Experience a guided imagery exercise imagining a holistic classroom space.

Reflection

Collaboration in the Transformational Learning Process – *Carol Geisler*

I describe how we use collaboration in research and arts-informed research to facilitate holistic healing (Braud, 1998; Ens, Sinacore, Ancis, & Phillips, 2004; . McNiff, 1998; McNiff, 2004). We use collaboration throughout our program, but I am going to focus specifically on how we use it in the research sequence because that is what I teach. Often, our perceptions about research are not neutral. If you ask yourself, what words pop into your mind when you think of research – what emerges for you? Our students share many of these same perceptions. We developed an integrative model for teaching and conducting research called *Mindbodyspirit Research* that is a living research model. We have created a research container big enough to hold the conventional, empirically oriented academic paradigms of research, as well as the emerging and yet to be discovered ways of conducting research. Our students would tell you that our research sequence does not look or feel like a typical graduate student research class. We include art, music, poetry, movement, and meditation in our teaching. We invite students to collaboratively engage in the research process with their mind, body, and spirit for a year and a half.

Most often, research is done in collaboration, but often people's experience of collaboration is one in which they lost their voice and had to give up themselves. We practice collaboration at both the faculty and student level. We have three faculty members who collaboratively teach the three courses, most often with two faculty members in the room at one time. We attempt to be transparent about our own collaboration and model philosophical differences and disagreements as well as the pleasure and joy of our collaboration in front of the students.

For many of us, our experiences with collaboration have not been positive because they are often experiences of coercion rather than collaboration. Our working (and sometimes changing) definition of collaboration is: a process that includes an intellectual, emotional, physical, and spiritual experience of joining with others without losing one's self, and staying in the process until the "highest good" is reached. The product of this process is often something far greater than any single person could have imagined or accomplished independently. We ask students to pay attention to and learn from their own internal process as they engage in the collaborative process.

We have been radical with our vision of collaboration and I will give you several examples of this from the classroom.

- A collaborative statistics exam.
- A method exam.
- Faculty feedback on students writing.
- Peer-review for writing.

Discuss collaborative research experiences.

Creative Practice as a Way of Knowing – *Janet Marinelli*

The healing journey is a theme in my teaching—healing as remembering our wholeness, reclaiming abandoned parts of the self, and moving into harmony.

The original experience that inspired me to use the creative arts in my teaching was a psychosynthesis training program that made extensive use of guided imagery followed by drawing with crayons and markers. I integrate concepts from psychosynthesis all the time in my teaching and realize it is some of the most powerful learning I've ever done. I find myself saying "I got the learning in my bones and blood." The guided imagery and the creative work were keys to the power of this learning. (Brown, M.E. 2004, Ferrucci, P. 1982).

In my on-going teaching, I often begin class with a visual image (mandala), have students create "beauty at the center" with objects brought to class, and/or use a brief creative arts exercise. A final assignment for each course is a creative arts project where students choose from multiple options all designed to demonstrate an integration of their learning. The emphasis is on process rather than product since most of us aren't professional artists with well-developed technique. Students understand that careless work isn't acceptable. I am touched, moved, and amazed by the results. It seems that when we tend to process we are often pleased with the product. Each year, I invite students to bring a piece of their work and together we create a library display, *Creative Arts and the Healing Journey*.

The creative arts are best defined broadly for classroom use as related to the healing journey and include drawing, painting, sculpture, crafting, quilting, knitting, fabric art, writing, poetry, storytelling, movement, music, drama, and more. The purpose of the creative arts exercises or what they help us do is supported in the literature (Ganim, B. 1999, Lane, M.R. 2006, Rogers, N. 1993, Samuels, M. & Lane, M. R. 1998) and includes:

- Bring what is inside to the outside to increases consciousness and self-awareness
- Tap into different ways of knowing
- Reclaim the artistic self
- Break through energetic blocks to give greater access to creative flow.
- Engage the body in kinesthetic process.
- Experience wholeness.
- Use creative arts as a tool for self-regulation and self-healing.
- Move towards self-realization

Engaging in the creative arts is advanced work since we are each claiming"I am an artist." For this workshop our sophisticated tools are crayons and markers and paper!

Experience a drawing exercise around the question "What have you learned at this conference that has heart and meaning for you? (Arrien 1993)

Participate in creating a group poem.

Conclusions and implications

We sit at the intersections of transformational learning, holism, feminism and social justice in a transdisciplinary model, holding a space for the healing journey for ourselves and our students, our university, our communities and the broader world. We engage in the rational and the creative and the spaces in between. The implications for change and shifts in consciousness are limited only by our imaginations and our authentic

engagement with each other and our work. bell hooks begins her book, *Teaching to Transgress: Education as a Practice of Freedom* with a quote from Paulo Freire: "…to begin always anew, to make, to reconstruct, and to not spoil, to refuse to bureaucratize the mind, to understand and to live life as a process-live to become…" We are grateful for this time to engage in this transformational learning experience with people engaged in the process and the possibilities for the seeds that might be planted through our exchanges.

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Group Processes That Foster Transformative Learning at Multiple Levels of System: Individual, Relational and Societal

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Abstract

This paper presents a framework for understanding the use of group work and dialogue in three kinds of transformative groups, categorized according to the developmental outcomes that they are designed to provoke and the levels of system that they are designed to impact: personal growth and awareness; relational empathy across differences; critical systemic consciousness.

Introduction

A rich literature characterizes *group work* and *dialogue* as contexts and means for personal and social transformation. In the transformative learning literature, the terms group work and dialogue are often used in varied and often imprecise ways.   In this chapter we present a framework for bringing these areas of literature together in order to explore how various kinds of groups provide a context for transformative learning, and the forms of dialogue that take place within them.

The foundational literature on group work for transformation can be found in the sometimes overlapping fields of: *adult education* (Lindeman, 1961; Dewey, 1916; Rose, 1996) where the emphasis has been on learning through discussion and on groups as incubators for democratic living; *psychotherapy, counseling psychology, and social work* (Yalom, 1986; Corey & Corey, 1977; Andrews, 2001) with a focus on the group as a context for personal growth and healing; and *social psychology* (Lewin, 1946; Lippitt, 1949), with an emphasis on intergroup and organizational relations and improving interpersonal communications.

The major threads in the literature on the transformative power of dialogue come from Carl Roger's (1961) work on person-centered therapy and the role of deeply reflective listening and unconditional positive regard; theologian Martin Buber's (1958) work on moving from I-It to I-thou relationships through a process of what he calls genuine dialogue; physicist David Bohm's work (1996), later adapted by Senge (1990), Issacs (1990) and others, on dialogue as a process through which people in groups can explore their assumptions and ways of meaning making; Paulo Freire's (1970) work on dialogue in connection with action as a means of revealing and changing our social realities; and various social constructionist perspectives (McNamee &`1 Gergen, 1999; Anderson, Baxter, & Cissna, 2004; Wasserman and Gallegos, 2009) on transformation though the engagement of differences and the creation of dialogic moments.

While all of these threads from both areas inform the literature on transformative learning in group settings, the connections are rarely explicit. The more aware we are of the implicit theories of change and transformation that underlie an approach to transformative learning, the more thoughtful and intentional we can be in using them.

Most of that transformative learning literature emphasizes the role of *relationships* with others as the Petri dish – the growth-supporting environment – that provides both the *container* and *space* in which such learning can occur, and the *dialogical processes* through which learning unfolds (Cranton, 2006; Taylor, 2009; Yorks & Kasl, 2006). We asked ourselves, *what is it about groups that can create a unique container in which transformation can occur?*

Types of Transformative Groups

Transformative learning is about both the process and content of meaning-making; the changes in our epistemologies and the assumptions, perspectives, and frames of reference that inform and underlie the meaning we make. Transformative learning is also about development: development toward more inclusive ways of understanding experience (Mezirow, 1991), higher orders of consciousness (Kegan, 1982), more critical

understandings of our sociopolitical realities (Freire, 1970), greater individuation and wholeness (Dirkx, 2000), and increased capacity for empathy across cultures (Landis, Bennett & Bennett, 2003).

We therefore find it useful to identify and discuss three main kinds of *transformative group work* (or *transformative learning in group contexts*) in terms of the developmental outcomes that they are designed to provoke:

- personal growth and awareness,
- relational empathy across differences, and
- critical systemic consciousness.

These goals of group work, defined more fully below, are neither pure nor isolated forms. Although these forms of group work can and often do operate separately, they can sometimes be combined in the same group experience. Figure 1 below provides a graphic representation of the uniqueness of each type of group, of how they overlap, and of how people interact within them.

Figure 1
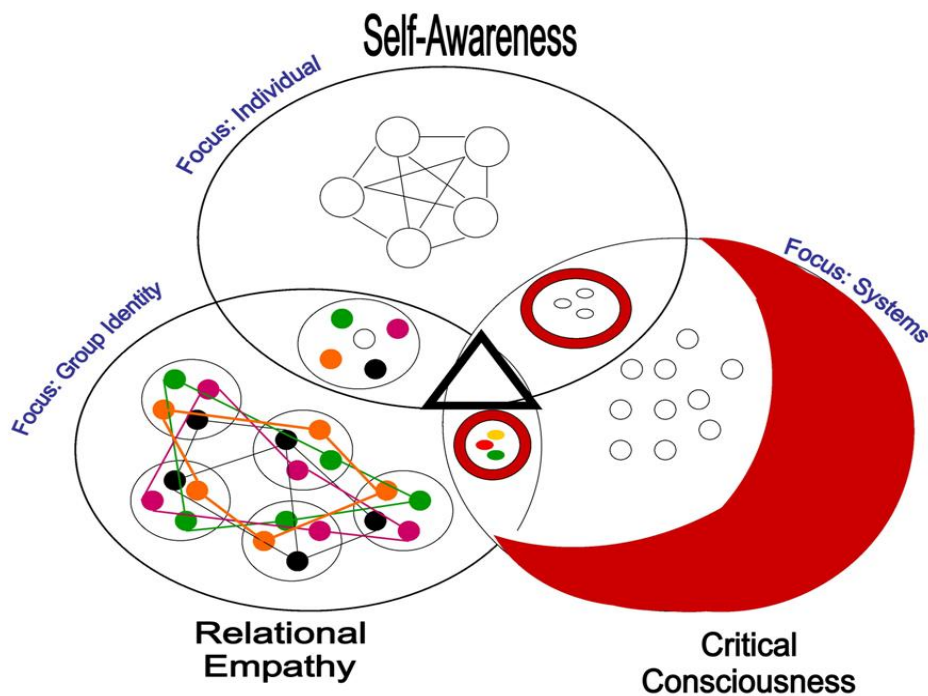
The illustration within each circle indicates the way individuals relate to one another to accomplish their goals. In the self-awareness type of group, people relate with a focus on what is distinct about them as individuals with minimal acknowledgment of group memberships or the larger systems and structures of society. In the relational empathy across difference kind of group, they foreground their membership in distinct social identity groups, relative to each other, with multiple sources of identity often intersecting simultaneously. In the groups with critical systemic consciousness as a goal, they relate as members of social groups and systems that seek social emancipation and social change for social justice.

These three types of transformative learning groups can be characterized in regard to five factors (See Table 1, page):

The basis for group membership and relationship, as explained above in reference to figure 1.

The experience that group members reflect upon and make meaning about: experience that is in the past and/or outside of the group, or experience in the here and now of the group itself.

The locus of change in the habits of mind and habits of being on which the transformative learning is focused – intra-personal, inter-personal, intra-group, inter-group, organizational, and societal.

The form that reflection takes in each group; and

The dialogic processes that are most often associated with each type of group, ranging from: individual sharing, listening, and feedback; to communicating differences; to collaborative inquiry in search of shared meaning and analysis.

Many of these factors are often overlapping and combined. Table 1 presents a framework for thinking about each kind of transformative group in terms of these five different factors. Following the table is a fuller discussion of each of these kinds of transformative group work with implications for guiding interventions in organizations and for educational design.

Table 1. TYPES AND CHARACTERISTICS OF TRANSFORMATIVE GROUPS

	GROUP TYPE (in terms of the goal)		
GROUP CHARACTERISTICS	**Personal growth & self-awareness**	**Relational empathy across difference**	**Critical systemic consciousness**
Basis for group membership and relationships	Common interest in personal and/or intellectual growth	Desire to explore differences and similarities	Interest in identifying, understanding and addressing shared social realities
Primary Experience that is the object of reflection and dialogue:	Individual perceptions and life experiences outside of the group and interpersonal interactions within the group	Lived experiences of social identities outside of the group, and interactions across differences within the group	Lived experiences of oppression, structural inequality, and life in systems outside of the group
Locus of change:	Intrapersonal, interpersonal	Intrapersonal, interpersonal, intragroup, intergroup	Intrapersonal, organizational, societal
Form of Reflection	Critical self-reflection on assumptions, images from our subconscious, and/or the group process	Mutual meaning-making across difference	Ideology critique, collective analysis of oppressive systems, and reflection on action for social change.
Dialogic process(es):	• Critical dialectical discourse • Dialogue with the self • Listening, witnessing • Feedback	• Storytelling that highlights social identity group perspectives • Exploring and imagining of the experiences of others	• Problem-posing, storytelling, and shared inquiry and meaning-making • Renaming shared social realities • Reflection on action

Groups for Personal Growth and Self-Awareness

This type of group is conceptualized as a collection of individuals who are there to support each other's personal learning. In these groups, the goal is self-discovery in the context of relationship with others. The sorts of self-discovery and self-awareness involved could be primarily intellectual, emotional, soulful, or a combination of all three. In such groups, the dialogue focuses on the self: on each person's ideas, assumptions, feelings, personal qualities, dreams, and so forth.

Examples of personal growth and awareness groups include study groups, therapy groups, meditation groups, encounter groups, t-groups, councils, and various kinds of self-help groups. This type of group exemplifies the concept of *group work* as a means to personal growth and change and is used most often within the fields of social work and counseling psychology.

In his construct, circles of trust, Palmer (2007) describes such groups as containers that support personal growth and change. These circles provide an opportunity for "being alone in community," a concept that expresses well this idea of group support for personal change. He talks of such circles as creating "a space between us" (p.56) that invites the soul, while recognizing that other such groups are more conducive to inviting the intellect, the emotion, the will, and the ego, all of which could involve different sorts of transformative learning.

Personal growth and self-awareness groups provide a context in which individuals can critically assess their assumptions and frames of reference, get in touch with and express their emotions, reflect on their own behavior, dialogue with aspects of their own subconscious, and reach new levels of personal integration and development. In such groups, the role of others is to listen and ask open and honest questions, witness and honor others' expressions of feelings, serve as a source of vicarious experience and identification, offer feedback about interpersonal behaviors, and at times challenge the validity of others' ideas and assumptions. In all such cases, others are there to help us to get in touch with, express, and clarify our own thoughts and feelings.

In these groups, the experience upon which the group reflects may be either outside or inside the group, depending on the focus. For instance, in a group focused on improving skills and capacities for resolving conflict, people might reflect on their past or ongoing experience with conflict outside of the group, and/or learn from conflict that emerges in the group itself.

Two particular conceptualizations of this sort of group stand out within the transformative learning literature: Mezirow's (2003) model of perspective transformation through critical dialectical discourse, and Boyd and Meyer's (1988) model of discernment and individuation through dialogue with the subconscious.

Groups for Relational Empathy Across Difference
In this kind of group-level work*,* transformation is often understood to come about *not* primarily through an individual or intrapersonal process of critical reflection or discernment in dialogue with others and the self, but as a direct outcome of the process of our genuine dialogue with an "other" or others. From this perspective, we transform as we socially construct new meanings of self and other through hearing and being changed by each other's stories and perspectives. In this respect, dialogue does not serve as context for the individual construction of meaning, but as a process for the social construction or coordinated management of meaning (Pearce & Pearce, 2003).

Relational empathy is a process of engaging and being fully present to another in the ongoing processes of relating. Elsewhere in the literature this concept has been described as mutual empathy. This is a reciprocal process, as described by Jordan (1991):

While some mutual empathy involves an acknowledgement of sameness in the other, an appreciation of the differentness of the other's experience is also vital. The movement towards the other's differentness is actually central to growth in relationship and also can provide a powerful sense of validation for both people. Growth occurs because as I stretch to match or understand your experience, something new is acknowledged or grows in me. (p. 197)

The development of empathy is both fostered by relationships and fosters relationships.

Often, the engagement of differences elicits a disorienting dilemma or dissonance. This occurs when each person has a different story of the quality of their connection with regard to their group level identities. This dissonance or seeming contradictions among the narratives of group members is the grist for this form of transformative group work (Wasserman, 2004). The group provides the learning space for members to share their stories and the time to reflect upon those aspects of each other's stories that are in tension with one another. The space and time that the group work affords is consequential to enabling members to reconstruct and expand their stories to include the identity narratives of others.

To the extent that the dialogues highlight social identities, the primary loci of change can be at the intrapersonal, interpersonal, intragroup, and intergroup levels. The change process unfolds as group members come to understand more about how they have constructed their own social identities in relation to those with whom they share each identity and those who are different.

Sometimes called the social emancipatory approach to transformative learning, the focus of this type of group is on understanding and changing shared aspects of group members' social realities, locations, and contexts. In Freire's words, education for critical *consciousness* (conscientization) is "the process through which men [*sic*] not as recipients, but as knowing subjects, achieve a deepening awareness of both the socio-cultural reality that shapes their lives and of their capacity to transform that reality" (Freire, 1976, p. 27).

Such groups work to understand the ways in which the "personal is political;" that is, the structural and systemic causes of what we may at first perceive to be our personal problems and limitations. Such a process can go on in, for example, women's consciousness raising groups, a Frierian culture circle, a community group analyzing pollution of the local environment, and an action research team in a corporate setting. It can apply to any process in which people reflect together on shared aspects of their social realities and develop a deeper understanding of the structural and systemic limitations to their full humanization and empowerment.

The transformative learning process leading to critical consciousness usually involves praxis; a continuing process of action, critical reflection, and dialogue. Transformative education from this perspective may include various forms of critical pedagogy (Darder et al, 2003), ideology critique (Brookfield, 1995) and popular education (Horton, 1990). The dialogue process usually involves story-telling about ones' experience, critical analysis of common themes and issues, problem-posing (posing the limitations people experience as problems to be solved and not as unchangeable facts of their existence), renaming reality in ways that envision the possibility of change, and that continuing praxis cycle of action, reflection, and dialogue as people attempt to bring those changes about. Freire and others (Vella, 1994) characterize this educational meaning making process as dialogic (that is, created through dialogue) as opposed to banking (that is, depositing meaning into students' heads).

While such dialogue can lead to an awareness of how individuals have unconsciously internalized the rules and norms of the hegemonic status quo, the focus is not on our individual psyches alone, but on the necessarily concurrent transformation of our individual consciousness and our social contexts at various levels of system – small group, organization, society and even planetary (O'Sullivan, 1999). Such work can include the sort of critical discourse described by Mezirow, but in this case that discourse is not purely "academic" or personal, but is informed by and leads to, action. This process can also involve working with and integrating images and feelings from the subconscious, as in the depth psychology approach, but again, the emphasis here is not on personality integration but on unpacking and transforming our internalized oppression and domination.

Such groups, reflect on people's lived experiences outside of and prior to the group experience, as well as, what plays out in the groups current internal dynamics as a microcosm (Slater, 1966) of the larger systems of which they are a part. Calling our attention to and trying to change how such dynamics occur in the group can help to raise consciousness about how they are occurring elsewhere, and what we do to either enable or interrupt the oppression that is all around us.

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Transformative Learning in Youth

Birgitte Simonsen & Knud Illeris

Abstract

Transformative Learning has always been closely related to adults and especially to adult education. However, any transformation presupposes that there is something transform. And this raises questions about when in the life course transformative learning can start, how this comes about, and which kinds of learning are previous to and make transformative learning possible. So this paper tries to give some answers to how, when and on which conditions the possibility of transformative learning occurs?

Introduction

Ever since the concept of transformative learning was first introduced by Jack Mezirow in 1978 it has obviously more or less exclusively been related to adult learning and education, but at the same time Mezirow has often mentioned that a great deal and probably the most important part of what is transformed has to do with the results of previous learning and socialization during childhood and youth (e.g. Mezirow 1978, 1991, 2000, 2009).

So there is an open question about the status and possibilities of transformative learning in childhood and youth and the transformability of various kinds of learning previous to adulthood. In this paper we shall address this question on the basis of the understanding that transformative learning does not only concern meaning perspectives, frames of reference and habits of mind as it is defined by Mezirow, but also the emotional, social and societal learning dimensions. (In another session of this conference Knud Illeris substantiates and discusses this understanding).

The background for taking up this question is our research and developmental work in youth and adult education for many years in combination with our interest in general learning theory.

Identity formation and transformative learning in childhood

The modern understanding of the concept of identity is usually ascribed to the German-American psychoanalyst Erik H. Erikson, who defined it as a combination of the personal experience of being the same in all the different situations of life and how we wish to present ourselves to others. Thus the concept has both an internal psychological side and an external side referring to our relationship to other people and the outside world. According to Erikson this identity is mainly developed during the life age of youth and maintained as a core of the personality for the rest of our lives (Erikson 1950, 1968).

Development of the core identity

However, in 1985 the American psychoanalyst and developmental psychologist Daniel Stern published his studies about how the basic elements of the core identity are established already during the first months of life when the infant experiences to be a separate being, and how this core is gradually supported by a growing amount of individual experience (Stern 1985). By combining psychoanalytic insight about early fundamental mental developmental problems or derailment with observations in developmental psychology of many different kinds and conditions of more normal development, Stern found that right from birth and up to the age of about three months a feeling of an emergent self occurs, i.e. of being a separate existence, and later up to the age of about nine months this develops into what can be termed a feeling of a core self, i.e. of being an existece among and in relation to others. Further up to the age of about fifteen months this extends into a feeling of a subjective self, i.e. of being different from others, and finally as a language is acquired the feeling of a verbal self is added, i.e. being able to cummunicate linguistically. The development through these stages happens by "quantum leaps" so that the earlier stages are fitted into the qualities of new stages (in line with the stages in the theories of Erikson and Piaget).

Obviously this development cannot be understood as transformative learning. Although qualitatively new stages are reached this happens through a development by which the qualities of the earlier stages are preserved and integrated as parts of the new state, whereas transformation implies a replacement – something new is created and something old is given up or rejected – and even the expression of "quantum leaps" does not imply any rejection but only that the development is not gradual, but clearly happens stepwise.

Transformations in childhood

Nevertheless, there are also changes in children's lives which could be called transformations – for example, the dramatic change which may happen when an only child gets a little sister or brother. This may be such a radical shift in the child's life situation and conditions that it clearly demands very fundamental changes and profound learning processes, which could be termed transformative. But they are enforced and inevitable and thereby qualitatively very different from the kind of transformative learning in which adults are usually involved.

However, for most children today changes of such a profound nature will happen one or more times during their childhood, in the family situation, when they start in childcare institutions or school, when they move to a new

place, where people perhaps speak another language, or still more drastic if they are involved in war, rebellion, accidents, natural disaster or the like. Today children are born into the very uncertain and changeable world of what the Polish-British sociologist Zygmunt Bauman has termed as "liquid modernity" (Bauman 2000) – which implies lots of possibilities and risks of both positive and negative changes in daily as well as fundamental life conditions.

All such changes can cause or directly impose transformative learning – whereas a more natural and gradual development in accordance with the growing age only in special cases implies such learning in childhood, but usually gives occasion for such qualitative progress through various stages which developmental psuchology has described in relation to all the different dimensions of childhood. The short account of identity formation and the possibilities of transformative in childhood given in the above should be sufficient to establish the background for understanding the development of these areas and capacities in youth.

Identity development and transformative learning in youth

Erikson delimited youth as the period from the end of compulsory education to the start of permanent employment and noted that the duration of this period has constantly been growing (Erikson 1971). Today the term of youth is used in many ways and often inexactly, but in psychology it usually covers the age from the beginning of puberty until a relatively stable and coherent identity has been established, which usually happens during the last half of the twenties, sometimes later, and for some it may be questionable if this ever takes place or life continues on the basis of what Erikson called identity confusion.

Youth as the life age of identity development

More important than the delimitation is, however, that as a consequence of Erikson's work it has become usual to understand youth as the life age in which the identity is developed, and that in this period the identity formation is generally the superior and directing force of mental life. Thus from the start of puberty the outlined childish formations gradually begin to be involved in the youth identity process in preparation for the creation of a full or mature identity, including a conscious and coherent experience of who one is, how one wants to be, how one is experienced by others, and in general the individual's relationship to her- or himself.

How this is achieved by young people in liquid modernity has probably most thoroughly been studied and described by the German psychologist and youth researcher Thomas Ziehe (2009) – but we have also ourselves together with colleagues been involved in such investigation (e.g. Simonsen & Illeris 2008). In a different perspective the so-called biographical approach to learning has also justified how biographical learning develops and constitutes the adult identity – and has in this connection emphasized that today this identity also tends to include what one wants to achieve in the future (e.g. Alheit 2009).

For the new generations growing up since the 1980s the task or duty of creating, maintaining and changing their identities has become more and more important and fundamental. Who am I? Who do I want to be? How can I fulfil my dreams? For some possibilities may be great and never-ending. But for others the many choices can become a strain, a continuous demonstration of their insufficient individual capacity to make things function. It is very difficult to obtain so much contact with one's identity process that it can be a yardstick for making the right choices when things are changing all the time. Identity development has today become a central issue, at the same time being very complicated, dealing with the most significant and decisive linking between the individual and society, and therefore also of crucial importance for the understanding of youth learning in general and of youth transformative learning in particular.

Transformative learning in youth

Thomas Ziehe has thoroughly described how young people today try to find tenable positions, sometimes enthusiastically cling to an idea or a way of behaving, and then almost from one day to the next may reject it and jump to a different standpoint or start a searching or orientation process – a kind of behaviour which can be seen as a modern and overriding variety of what early psychology identified as trial-and-error learning (e.g. Thorndike 1920). In school a group of youngsters may, for example, with great commitment try to attribute a specific view to their class-mates, which may dominate the class for a certain time, and then without any clear reason gradually may be replaced by something else.

All such searching and uncertainty may no doubt include and demand a lot of transformative learning. But especially in early youth (typically up to the age of 17-19 years) the kinds of transformations involved in such search movements are fundamentally different from the typical transformative learning in adulthood, because the identity elements – including meaning perspectives, frames of reference and habits of mind – do not yet have the same well-established nature and strength as in adulthood.

Therefore, in early youth, what is transformed are generally rather vague, uncertain or provisional ideas, notions, conceptions and patterns of reacting and behaving, and what is developed at this stage has mainly a provisional nature, being open to changes or even rejection when new and perhaps very different or contradictory impressions turn up and are taken in. In this early period of youth identity and meaning perspectives are thus generally unstable, not in

the way that they cannot be claimed with strong conviction, but because they can be overruled, given up and replaced rather suddenly if new and more convincing or agreeable possibilities turn up. This relates to meanings and understandings as well as attitudes, appearance, behaviour and preferences – to what is regarded as true, as smart, or as impressive.

In later youth identity elements and meaning perspectives then gradually become more stable, considered and deliberate, but in many and not least the most important aspects and areas doubt and sincere uncertainty and considerations are still involved right until a fairly stable identity is in place, which as mentioned today usually does not happen until some time during the last half of the twenties – and this will not be an identity of the mature and stable kind which was assumed by Erikson and his contemporaries, but a modern identity characterized by a delicate balance between stability and flexibility.

Identity development, search movements and transformative learning

So transformative learning in youth can be described as a kind of searching, examining or testing movements in relation to all sorts of understandings, attitudes, ways of behaviour, ways of relating to others, ways of feeling etc. These movements are carried out under the strong pressure of having to be somebody, which today must include a combination of the contrasts of being something special and unique and at the same time living up to all the norms and standards of modern consume, life style, flexibility and sometimes also careerism.

How this is practiced, not least in relation to education and work, depends very much on the individual circumstances and background, including the provisional identity as developed during childhood. Bacause of the complicated and conflicting conditions there seems to be almost as many strategies as there are young people – and it is an inevitable part of these conditions that a personal and unique course must be invented and practiced, a special and unique way of finding a route to end up at a destination which is absolutely personal and yet at the same time inside the narrow scope of what is acceptable and what is in.

Especially parents, teachers and supervisors dealing with young people today will know the endless considerations, discussions, trials, withdrawals and new attempts involved in these processes. It may seem diffuse, exaggerated and unneccessary, and it is certainly hard, strenuous and exhausting for the young people themselves. But they must find their way through the jungle, and they must do so by means of all the major and minor choices and decisions they make, day by day through so many years – choices and decisions which involve what may be understood as the bricks or elements of transformative learning in youth.

Thus youth transformative learning has in general the nature and characteristics of search movements which develop from the very diffuse outset in early puberty into gradually more goal directed trials, but all the time being of a kind involving at the same time taking in new land and possibilities and maintaining the possibility of returning to safer ground. So young people today will often do what they can to avoid definite choices an decisions, and at the same time they may be vulnerable and touchy, and they hate to be bored.

It is a lengthy transition process to get from the dominance of diffuse searching processes in early youth into situations in which standpoints, attitudes, interaction, emotional patterns and many other similar conditions and relations begin to find more stable forms so that they can be further elaborated, changed or replaced through learning of a more transformative kind. This all happens gradually and almost imperceptibly, and it is in no way possible in this connection to establish any specific boundary between what can be termed search processes and what has the character of genuine transformative learning.

The challenge of becoming an adult in liquid modernity

But when the age of youth is about to run out, when stable identity structures are created in the various mental dimensions, they will also come to form integrated patterns such as meaning perspectives, frames of reference, habits of mind, clear attitudes, specific emotional ways of reacting and social ways of functioning, which are all formed by transformative learning and can be altered and further developed by new transformative processes. The individual has found a coherent identity which will as a crucial feature also include the personal kind of balance between stability and flexibility, which is typical and necessary for adults today.

However, some of the most balanced and secure young people will have a fair chance to live up to the ideal of a gradually progressing development ending by a personally and socially satisfying result. But for the majority the identity process in liquid modernity is much more uneven, indirect, muddled and even confused. At the one hand they are confronted with an enormous and totally incalculable amount of identity possibilities, for example in the form of models in commercials, reality shows and other items in the media, in identity forming activities and groups, offers of shaping and improving their look and appearence, elements of life style, gender related possibilities of experience, ethnic conditions, religious radicalism, and an endless lot of other matters. On the other hand there are the offers, expectations, advices and counselling of society and the grown-ups, who well-meaning and hopefully try to contribute and help and push and press each of the young ones through to a result which is acceptable and satisfying to both themselves, their parents and society.

In this almost boundless confusion of offers and possibilities, which appearently are open for anyone, but nevertheless for the most in reality are highly limited, the young people must constantly make their choices and create a coherent course. The challenge is in the heart of hearts to grope for what in each of all these choices and situations is quite the right thing to choose or to do *for me* – to get in touch with the provisional traits of the identity, which may be able to produce a practicable answer, but often only can deliver some rather accidental and incoherent scraps, which are the results of the passed search movements and experiences. Further one has to take the responsibility for all the consequences of such doubtful choices and decisions and have the currage and ability to make changes, but not make too many detours or errands on the way. It is very important to be successful, to be able to do well, and first of all to be happy all the time, because this is what it is ultimately all about, what is set up as the ultimate purpose.

But what then does all this imply? – and how durable can it be in a liquid and ever changing world? We shall not here proceed through all the many complications of youth today. It is all about the lengthy and often tortuous course, which it is necessary to overcome today to fulfil the creation of a coherent identity – a process which already Erikson in the 1960s found challenging and demanding, and which today, a couple of generations later, has become still much more complex than what it was possible for him to imagine – and to avoid the identity confusion which he set up as the always threatening negative outcome of the process. Today it is probably more realistic to admit that only very few are able to avoid elements of such identity confusion, and even that this may be a kind of necessary condition of meeting the demand for flexibility, which in the meantime has become just as important as the demand for stability and coherence in the identity.

In all of this complicated field processes of transformative learning can be involved as soon as there are elements, which are so well-established that they can be changed by proper transformations – for example, in the cognitive area that conscious and substantiated meanings and coherent understandings are acquired, in the personal area that there is a reasonably stable self perception, or in the social area that conventions and relational patterns are developed, which are so stable and tolerant that they exceed the individual ego-centricity and what is immediately attractive. But the boundary between what at this age is still mainly search movements and what can be said to have the nature of transformative learning must of necessity be uncertain. However, a superior objective of the identity process and also of educational efforts in youth will always be to aim at an identity formation which is both relatively stable and at the same time open to new and genuine transformative learning.

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"The teacher I have become is a teacher, not an engineer."
Charting the Transformation of Career Changers Transitioning to Secondary STEM Teaching

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Abstract

Jack Mezirow's Transformative Learning Theory undergirds the analysis of this qualitative case study (2000) and current survey research which demonstrates that highly skilled career changers as well as traditionally aged graduate students face daunting challenges as they transition to careers in secondary teaching. Based on the study results, the authors contend that teacher preparation needs to be *recursive, relevant, emancipatory and associative*. A pilot survey study is now underway to test the generalizability of the case study across a demographically broader cohort of teacher candidates. A graphical representation of the participants' transformation across time is presented.

Keywords: Jack Mezirow, Transformative Learning Theory, teacher education, career changers

Study Overview

This hour-long talk will report on a qualitative case study which demonstrates that highly skilled career changers face daunting challenges as they transition to secondary teaching. Jack Mezirow's Transformative Learning Theory (TLT) (2000) undergirds the analysis of this qualitative case study. Four women career changers in science, technology, engineering and mathematics (STEM) fields were followed for three years as they participated in a twelve month graduate level teacher preparation program and then transitioned into their first two years of teaching. This highly triangulated study employed face-to-face interviews, participant-generated-photography, coding of participant reflective writing, member checking, and analytical memos. Findings focused on challenges faced by the career changers and the supports attributed to their success. TLT illuminates the transitions made by participants as they oriented themselves to secondary teaching. Findings indicate the transition was deeply stressful and that this stress was unanticipated; the length of the teacher preparation program, including a full-year internship, was requisite to their success; the community building aspects of the program, including the cohort model, played an integral role in participants willingness to trust in themselves; reflective writing and discourse among the program participants and faculty played a central role in their willingness to pursue teaching. In addition to the now completed case study, preliminary findings of a recently launched survey study will be discussed. The survey study is testing the generalizability of the case study findings with a larger, demographically diverse cohort of teacher candidates. Preliminary indications reveal data trending directions similar to the case study.

Using the ten phases of TLT (see Table 1 below), the presenters will step attendees through the transitions made by the study participants using a quantification of the coded data as well as participant-generated-photography as the study participants retooled from successful STEM field jobs to secondary teaching. Over one hundred pages of qualitative data per study participant were coded with the ten phases of TLT. Those codes were then mapped across three time periods: pre-teacher education program, teacher education program, and two years following teacher education program. The resulting visual display of movement across the ten phases is revelatory in that it clearly displays trends toward transformation while at the same time uncovering transformation as both fitful and spontaneous (see Chart 1 below).

A follow-up survey study is now underway to test the generalizability of the case study. A cohort of 28 graduate teacher candidates completed a survey based on the case study and the ten phases of TLT prior to entering the teacher education program and at the completion of the intensive summer program. Participants will be invited to complete the survey again at the midpoint (January, 2013) of the program and at the end (June, 2013). Preliminary data analyses indicate a trending of the data similar to what was found in the case study.

Table 1
Mezirow's Ten Phases of Transformative Learning

Phase	Description
1	a disorienting dilemma
2	self-examination with feelings of fear, anger, guilt, or shame
3	a critical assessment of assumptions
4	recognition that one's discontent and the process of transformation are shared
5	exploration of options for new roles, relationships, and actions
6	planning a course of action
7	acquiring knowledge and skills for implementing one's plans
8	provisional trying of new roles
9	building competence and self-confidence in new roles and relationships
10	a reintegration into one's life on the basis of conditions dictated by one's new perspective

Mezirow, 2000, p. 22

The presentation will include a discussion of the relevance of the study findings: in order to increase the likelihood that newly certified teachers stay in the classroom, their teacher preparation needs to be *recursive, relevant, emancipatory and associative*. The authors suggest that attention be paid to teacher education pathways to critically evaluate their value to the field. Recent policy decisions made in New York State will be used as an example of both strong and potentially disruptive strategies for improving teacher education.

Finally, conference participants will be invited to provide helpful feedback regarding a follow-up study now underway. A survey instrument based on TLT's ten phases has been developed to track transformative trends. A 2013-14 study is planned which will survey two different graduate teacher education programs (N~50). The programs use significantly different approaches to teacher education. Again, the researchers are questioning whether or not the transformative trend is evident across a variety of teacher education pathways and demographics. Results will be analyzed across various cohorts (gender, career changer/traditional student, discipline, etc.). Initial study results will be shared for feedback at the conference.

Study Framework
Under pressure to fill the increasing need for highly skilled educators, state education departments are creating alternative pathways to teaching for professionals (Council of Chief State School Officers, 2003; Johnson, Birkeland, & Peske, 2005). These pathways, referred to as fast or side track certification programs, have as their goal the swift, if not immediate, transition of the professional into the classroom. Fast track programs typically transition a professional into the classroom after a five to eight week intensive course. Side track programs move the professional into the classroom immediately and provide mentoring and pedagogy instruction during the first year or two of teaching (Feistritzer, 2005; Friedrichsen, Abell, Pareja, Brown, Lankford & Volkmann, 2009; Johnson, Birkeland & Peske, 2005; Johnson & Birkeland, 2006). These programs developed to meet the increasing need for highly qualified teachers. Several factors are contributing to this increased need.

First, the teaching population in the U.S. is aging and for the last decade has experienced a wave of increased retirements. This wave will continue to crest for the next five to ten years (Business Higher Education Forum, 2007; Woodrow Wilson Fellowship Foundation, 2008). Second, the number of students enrolling in college level courses is increasing (Business Higher Education Forum, 2007; Woodrow Wilson Fellowship Foundation, 2008). These factors combine to create a demand not just for more teachers, but also highly qualified teachers with the content knowledge and skill to teach upper level classes to secondary students. It is no surprise that state education departments are trying to meet the needs of constituents by attracting experienced professionals into teaching. The underlying assumption is that because these individuals know their content and are willing to make the financial tradeoff necessary to become teachers, they will, for the most part, be committed and effective professionals (Woodrow Wilson Fellowship Foundation, 2008). New York State's recent fast track certification program for STEM professionals is highlighted as an example of state education policy attempting to meet this crucial need for highly effective, certified teachers (New York State Education Department, 2011).

The authors of this study invite readers to consider a different perspective. A three year qualitative case study was completed with four STEM field professionals transitioning from engineering, science research and business into secondary teaching. The study tracked the participants from their decision to enter a fulltime, clinically-based, one year graduate program to the completion of that program and into their second year of teaching. Reflective writing, journaling, interviews, email correspondence and member-checking were used as data was gathered, coded (Rubin & Rubin, 1995) and analyzed for emergent themes (Creswell, 1998; 2008). The participants were all women, with between six and fifteen years of professional experience. All four made the decision to leave successful careers to move into teaching. Two were research scientists at blue chip companies, one was a naval engineer and one a pharmaceutical equipment saleswoman. All four women were mothers; two were divorced; two held master's degrees already. As a group, they would be considered high achieving and role models for women in their respective fields.

The data was analyzed through the lens of the following two research questions:
1. What challenges do career changes face when transitioning from other professional fields into secondary teaching?
2. What supports helped career changers meet those challenges as they transitioned from other professional fields into secondary teaching?

The theoretical framework used was Jack Mezirow's Transformative Learning Theory (2000). This learning theory is particularly suited to this research because of its specific focus on the adult learner. Based on grounded theory developed from a study originally conducted in the 1970s, Mezirow compiled a set of phases adults commonly move through when learning something that changes the way they think about themselves and the world in which they interact (Mezirow, 1978) (see Table 1 above). Now in its fourth decade of testing and refinement, the theory has proven to be particularly robust as a framework for analyzing the learning adults undergo when experiencing new learning (Mezirow 1981, 1990, 1991, 2000). The transition to secondary teaching from careers in business, science research and engineering required the participants in this study to shift their way of thinking about themselves as professionals as well as the way they use the content and technical knowledge they have of their professions. Mezirow's theory supports the authors' thesis that fast track or side track teacher education programs fall short of the education necessary to prepare highly skilled educators. In order to reach a transformative level of understanding of their new profession and their role within that profession, Mezirow's theory supports the authors' contention that career changers need a purposeful, thoughtful and heavily mentored teacher education program.
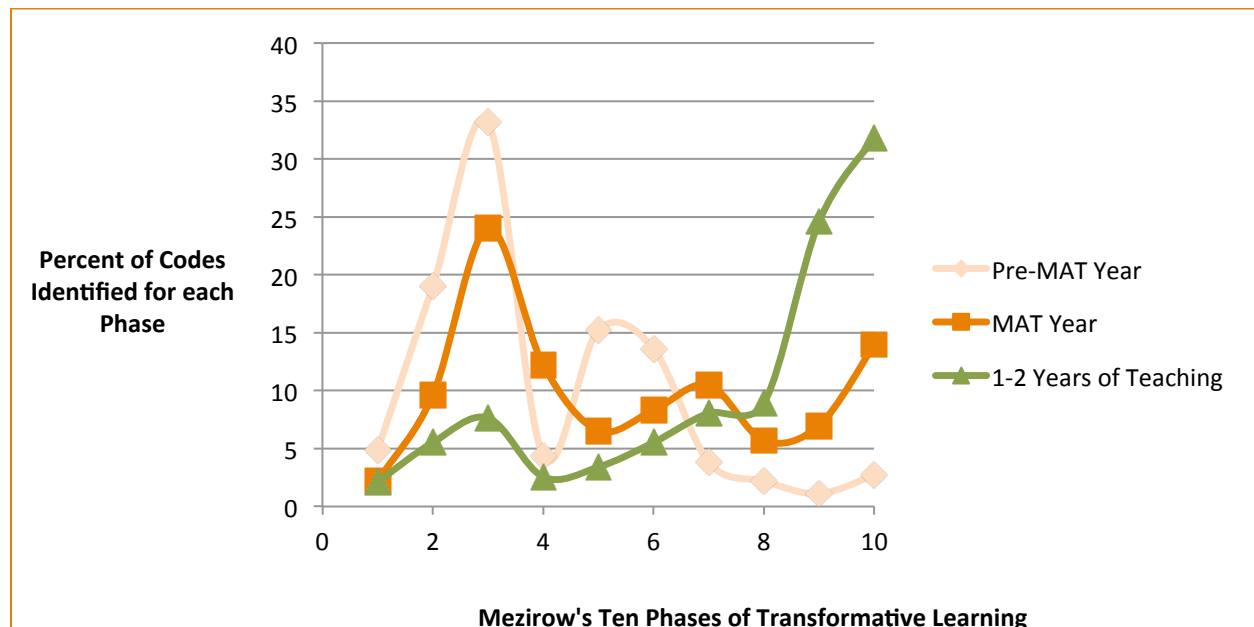
Study Findings
Findings revolved around the transformation undergone by the study participants as they transitioned from STEM fields to secondary teaching. Transformative learning theory illuminated the changes in the way the participants thought about themselves as professionals and about teaching. Results indicate the transition was deeply stressful and that this stress was wholly unanticipated. The participants left successful careers to become teachers and anticipated that because they knew their content well, the transition would be smooth. This assumption was dismissed by all four participants early in the program when they realized they had much to learn about adolescents, the teaching profession and pedagogy. Participants cited the length of the teacher preparation program, including the full-year internship as integral to their success. Data indicated that it was only through several iterations of core material that participants began to shift from a traditional and ineffective paradigm of teaching to a more research-based and constructivist paradigm of teaching. The recursive nature of their teacher education, which could only be

provided within the context of a long teacher preparation program, contributed to their transformation in thinking about teaching and themselves as teachers.

Participants also noted the community building aspects of their teacher education program as well as their secondary school departmental colleagues. In the teacher education program, these community building aspects included the cohort model which inspired participants to trust in themselves and each other, mentoring during their internships and in their jobs and collegial relationships they built over time. The associative nature of the learning participants' experienced helped set the stage for success as they moved into their teaching positions. They understood the value of collegial interaction, mentoring and collaboration. Finally, reflective writing and discourse among the program participants and faculty played a central role in their willingness to pursue teaching. The validation participants received from the faculty through journaling encouraged the participants to work through moments of severe self-doubt. In the end, the participants felt confident in their ability to continue to learn and grow as professionals. The tools they acquired as part of their teacher education provided an emancipatory perspective toward teaching and learning that allowed them to continue to grow as professionals.

Chart 1 below is a graphical representation of the percent of utterances coded in each of the ten phases of Mezirow's TLT (Mezirow, 2000). The utterances were taken from the documentation provided by each participant. This documentation included application materials, emails, journaling throughout the one year teacher education program, narratives written about participant-generated photography and face-to-face interviews. The documentation was divided into three time frames reflecting participants thinking prior to enrolling in the Master of Arts in Teaching (MAT) program (pre MAT year); their thinking during the program (MAT year); and their thinking in the two years following graduation from the MAT program (1-2 years of teaching). As is evident from the chart, participants' utterances coded as phases one through three were higher prior to entry into the program and in the beginning stages of the teacher education program. It was not until participants were in their second year following graduation from the program that utterances at phases nine and ten rose substantially. This graphical representation of the participants' transformative learning over time indicates that participants' transformation into professional secondary educators took a substantial period of time to develop – two years after graduation from the program. It also illustrates the unpredictability of their transformative journey as coded utterances rise and fall unpredictably. Conclusions from the case study indicated factors for success were the *recursive, relevant, emancipatory and associative* elements of the program. These elements represent labor intensive, time consuming methods of teacher education which would be difficult to replicate in shorter time frames.

Chart 1
Charting the Ten Phases of Transformative Learning

These findings provide a counter weight to the movement toward shorter teacher preparation time and a de-emphasis on pedagogical training. The participants in this study transitioned into their teaching positions and continued to grow professionally as a result of the purposeful and research-based teacher education they received. It is the authors' contention that fast and side track programs have the potential in increase teacher turnover, decrease the quality of teaching.

Following the data analysis, researchers then asked if these findings were relevant to traditionally aged graduate students (non-career changers). To answer that question, a Likert scale survey instrument was developed based on the case study findings. This survey was administered to an incoming cohort of 28 teacher candidates prior to their entry into the teacher education program, and at the three month mark. The survey will be administered two more times during the program to measure the change in participants' thinking regarding their teacher development. Preliminary analysis of the first two surveys (prior to start of program and three months into the program) indicate a transformative cycle similar to the one revealed by the career changers. A plan is in place to use the survey instrument with two different schools of education in the 2013-2014 academic year.

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Shifting from Knowledge Power to Generative Inquiry: Creating the Field for Transformative Learning in Healthcare and Business

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Abstract

Our work in creating opportunities for transformative learning for individuals and organizations has surfaced a pattern that needs attention and consideration. That pattern is an overreliance on knowledge power that keeps us focused on acquiring more information, often from experts, planning and strategizing based on that information, and taking action assuming that we have the information and knowledge needed. Learning for the most part is used as an adaptive rather than transformative process. Two case studies show how organizational leaders can create a field for transformative learning and change in organizations using a generative inquiry approach.

Defining the Shift

One might say that our thirst for information keeps us stuck in a cycle of singe loop learning, a pattern that Argyris and Schon (1978) identified as endemic to organizations. Argyris posited a shift to double loop learning to support improved knowledge generation and decision making. A reflection on action cycle defines the difference between double and single loop learning. After action reviews are a good example of a process intended to support double loop learning. The challenge however is ensuring that what shows up on an after action review is used to inform future action. Often, knowledge that is generated from these types of reflective processes is overlooked in favor of knowledge that is offered from an expert point of view.

To create the conditions for transformative learning and change, we need to shift from a reliance of knowledge power which often resides outside of our collective spaces, to embracing shared understanding that is generated through intentional inquiry that draws forth meaningful, contextual knowledge. Closely related to the concept of triple loop learning, generative inquiry reflects on the underlying assumptions of our actions and the larger systemic context in which they exist. Transformative learning on the individual or organizational level requires the ability to expand our understanding of who we are and what we do within a larger context. Gadamer (1993) referred to this contextual learning as a fusion of horizons or the process of enlarging one's horizon through a deep understanding and ability to embrace the horizon of another. We see the process of generative inquiry as this type of ontological learning process, a way of being together, as well as an epistemological process of generating knowledge through inquiry, reflecting on it within a context, acting on it, inquiring and reflecting on the learning, and generating new inquiry to continuously support learning and change.

Our paper provides two case examples, one in healthcare and one in the business sector to show how organizations that have been traditionally over reliant on knowledge power can take action to create a container for generative inquiry to support transformative learning and change. You will see in these mini case scenarios, how the work of transformative learning and change requires an understanding that people are working within a cultural context and thus the change being generated is cultural change.

As educators, we need to consider the implications of this shift within our educational institutions. Habermas (1985) noted how the focus on instrumental education was limiting the development of critical thinking and thus negatively affecting civil society. Democracies and other forms of participative governance require citizens who are able to recognize when power is used over others in a way that suppresses participation. Participative governance in societies, much like shared leadership in organizations, requires people to constructively engage disagreement and move toward agreement through a critical inquiry process. The skills of critical thinking and dialogue are supported by the art of inquiry and reflection to enable learning and change.

Our challenge is creating learning communities throughout the educational process from K-12 through higher education where generative inquiry drives knowledge acquisition and where students quest for greater

understanding of the context in which they participate. Developing the capacity for transformative learning begins at an early age as children learn how to learn and learning how to learn is a capacity we build throughout our lives. Unfortunately education at all levels is becoming more instrumental, focused on acquiring information, often out of context, and irrelevant to learners. We see greater pressure in higher education to create curriculum to help students get jobs. Critical thinking, inquiry, and reflection are replaced with knowledge and skill building that can be accomplished in the shortest period of time and put to use in the workplace. Students quickly learn that education is about acquiring short term knowledge and miss the opportunity for meaningful inquiry and exploration of the unknown.

How do we shift from this focus on knowledge power to generative inquiry in education and in our organizational systems and what difference would it make? Creating curriculum that supports students in experiencing their own transformative learning and leading transformative change can bring purpose to learning. Intentional inquiry can support encounters with the other that challenge beliefs and assumptions. To create the conditions for this type of learning, educational institutions need to recognize the importance of developing learning communities and consider how to engage students and teachers within them in a way that creates space for generative inquiry. These learning communities require teachers to reduce their reliance on knowledge power and become learners alongside their students.

The gap between adaptive and transformative approaches to learning and change is significant. A generative approach is a collaborative process that brings into question what we are doing and why. It creates a space where creativity, systems thinking and design thinking can lead to new ways of being and doing. A generative approach is best accomplished through deliberate conversations, well-orchestrated workshops and open conversations where questions and ideas can emerge.

Participating in this space of transformative learning and shifting from knowledge power to generative inquiry involves the following shift in beliefs and assumptions.

Knowledge based	Generative
Reality is objective	Reality can be socially constructed
Science is truth	Science informs our ability to create truth
Others know better	We know ourselves and our situation better than anyone
We need someone else to guide us (and to blame if it fails) – "how will they?"	We are accountable for our future – "how can we?"

Generative inquiry creates a space for people to reflect together on their experience and assumptions from which insight, understanding, commitment, and engagement emerges. When people are invited into a process of generative inquiry they discover how to listen differently, in a way that considers the frame of reference or meaning schemes (Mezirow, 1990) and deeply held assumptions they and others hold. This approach to listening supports an emergence toward shared understanding and constructed knowledge.

The following two case studies provide concrete examples as to how these ideas can be put into practice.

Case Study in Healthcare

Background

The groundbreaking report of the Institute of Medicine (IOM) by Kohn, Corrigan, and Donaldson (2000), "To Err is Human: Building a Better Health System," revealed that as many as 98,000 people die each year from medical errors. While significant effort and substantial amounts of money have gone into making improvements in patient safety since the IOM report, recent assessments demonstrate that little progress has been realized, and, according to some accounts, there has even been a decline (U.S. Department of Health and Human Services, Agency for Health and Research Quality, 2008; National Quality Forum, 2009).

A major contributor to the lack of improvement is what is commonly referred to as the *culture of medicine* described as a tradition of individualism, hierarchical authority structures, and diffuse accountability. This culture

creates significant barriers to teamwork and individual accountability for successful interdependence which is required for safe patient care (Leape, & Berwick, 2005).

In their review of patient cases over a four-year period, leaders at a community hospital's Family Maternity Center (FMC) determined that occasional poor patient outcomes were a result of that culture. Common themes were: turf issues; existing organizational and professional hierarchical structures leading to difficulties working through disagreement; communication patterns among and between the staff and providers showing gaps in critical information and varying expectations related to needed action; and, the lack of understanding and enforcement of accountability for patient safety.

Issue (s) Being Addressed

Over the prior four-year period traditional methods such as changes in policies and procedures, guideline development, and education, were utilized to address the cultural barriers to providing safe care. These established (or traditional) approaches represent single loop learning and offer only information that fits into existing paradigms. Single loop learning facilitates incremental improvements, which often times is sufficient. However, due to the recurrent nature of the concerns and the potential dire consequences of the outcomes, FMC leadership realized that a new approach was needed. They desired an approach that would facilitate a reframing of the issues so that fundamental shifts in worldviews, perceptions, and behaviors could bring about collective action for change.

The Approach Taken

An intervention that took place in September of 2011, was titled The FMC Patient Safety Summit. It was a mandatory, all day event, designed to engage the entire FMC care-taker team in exploring the problem of patient safety in a new way. To reframe the current situation, opportunities for double and triple loop learning were provided to the participants. Facilitated sessions created space for the group to question the assumptions and mental models that drove past decisions and actions. Further, the group identified values and norms that were at the core of these assumptions and mental models. This level of group reflection fostered a collective awareness and understanding of how the context (culture) influenced individual and collective action. With this new awareness, possibilities for change were explored.

The FMC Patient Safety Summit was structured in three phases: *analyze, decide*, and *act*. Starting with the *analyze* phase, participants learned about the patterns of errors in healthcare. Together they watched a film where actors reenacted themes from past FMC cases in which less than optimal patient outcomes were shown to be a result of poor communication, coordination, and teamwork. These stories were selected by the summit planning team because they included the most common themes affecting teamwork identified through four years of FMC case reviews.

Following the film, using the Organizational Culture Change Pyramid model developed by Nancy Southern (2005) (Figure 1), and adapted from the work of Peter Senge and Edgar Schein, the case themes were deconstructed to identify the events that occurred and their presenting problems. Working through the model enabled participants to identify the assumptions and beliefs that underlie behaviors and problems and develop new patterns of actions and supporting structures for improved care team coordination.

Figure 1 - Organizational Culture Change Pyramid
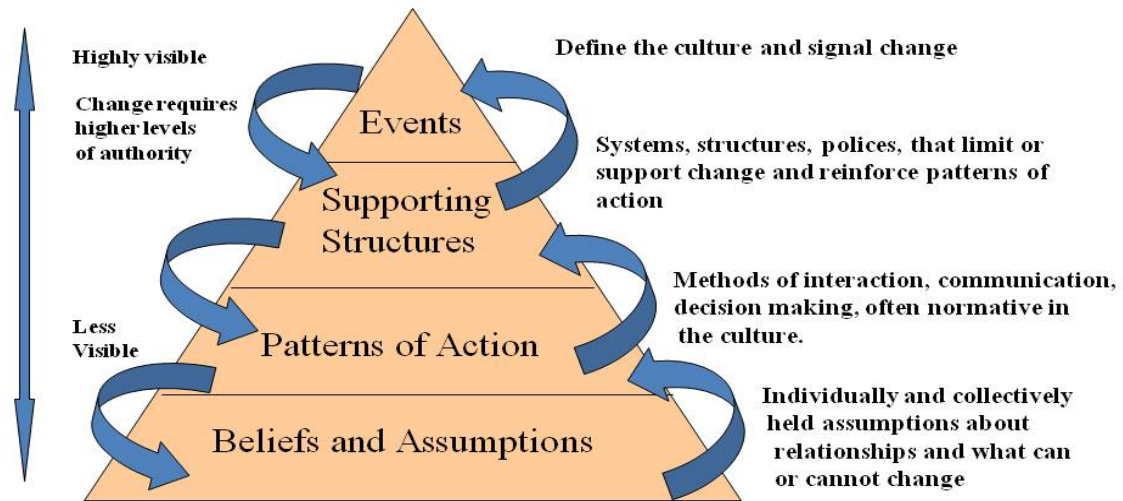
Adapted from the work of Peter Senge and Edgar Schein   Nancy Southern & Associates, 2005

The *decide* phase provided a foundation for group decision making and opened with presentations on specific cases with poor outcomes, the safety practice improvements developed from those cases, and current performance related to those practice improvements. A round table discussion prompted participants to identify and prioritize safety practices that would lead FMC members towards safer patient care.

The last phase was the *act* phase. This session was designed to engage the participants in exploring how to enact new ways toward an improved culture of safety and develop new teamwork commitments to use immediately. Prior to the summit, participants were asked to suggest, or select from a pre-developed list, a new team behavior they felt would improve patient safety. At the summit, all of the suggestions were presented and the participants were asked to rank them in order of importance. The most popular behaviors from the ranking became the new FMC teamwork commitments which they named *The Declaration of Interdependence*.

Emergent Themes/Insights/Problems

Participants described this all day event as intense, emotional, and uplifting. Dialogue on areas of conflict and power dynamics that affected the team and patient care led the group to challenge the traditional decision-making structures and processes under which they had been operating. They developed new structures and processes that reflected their new teamwork commitments along with recognizing human fallibility and valuing the perspectives of all team members.

Several months later, participants were asked to describe the changes they experienced in themselves and their colleagues as a result of the Summit. A common theme expressed was providing more support to others and being more proactive in their roles as team members. All were embracing past safety practices as well as the new ones and putting more effort into improving communications with one another. Specifically, employees at the lower level of the organizational hierarchy experienced greater comfort speaking up and asking questions as a result of a general sense of team support. Those at the upper levels of the hierarchy acknowledged the new found assertiveness on the part of the other staff members and were taking steps to be responsive and encourage it. In their reflections on this particular change, while many of them described feelings of pride as they were witnessing the new interactions among the care-taker team, some of them described the difficulties they were experiencing as they were adjusting to this new dynamic. What was apparent was that the generative approach of this Summit created the conditions for transformative change. Effects in patient safety will be measured over time.

Case Study in Business

Background

One in three change initiatives have been deemed successful since the fields of management and leadership studies began researching large transformational changes (Meaney & Pung, 2008). Isern and Pung (2007) characterize large organizational transformation as having "startlingly high ambitions, the integration of different types of change, and a prolonged effort often lasting many months , in some cases, even years (p. 1)".

This case study documents a large transformational change at a medical devices company in the San Francisco Bay Area. In 2009, Pharma Supply (pseudo name) embarked on a program to retool all of its core processes, implementing a new computer system to operate them, from order processing to manufacturing to financial management. The initial results of the implementation of this program fell in line with the two thirds of change initiatives that are either challenged or do not succeed. The following sections summarize what Pharma Supply did to overcome its initial challenges and ultimately achieve the goals they envisioned for their change.

Issues Being Addressed

After a year of working on retooling its processes and systems, Pharma Supply decided to go "live" with them. Within a month of the implementation, it became clear to the leaders of Pharma Supply that the company could not operate the new processes and systems for they were not correct or clear to everyone. An assessment of the consequences of this situation concluded that the company would likely miss its financial forecast for the quarter and seriously affect customer relationships.

Inherent in the process and systemic problems at Pharma Supply, was the seemingly insurmountable challenge of changing the culture and interactions of the company that led to this potentially disastrous outcome. The CFO and a small number of leaders of the company viewed the culture and interactions as the most important areas to address. They believed, if people who worked together in the program could quickly learn how to work differently there was potential of overcoming the difficulties.

The Approach Taken

Schein (1993) submits that dialogue can speed up the process of change within an organization. Dialogue allows for the identification and solution to a problem by "thinking together." This process starts with the suspension of our underlying assumptions followed by deep inquiry into the assumptions of all of the participants. Dialogue can build a container of trust, a safe place to explore new assumptions, beliefs and actions, similar to what we described in the healthcare case scenario above.

Pharma Supply decided to use a dialogical process to bring its change team together, achieve a high level of coherence and make quick progress towards fixing the process and systems problems. A leader/moderator was assigned to oversee the process. This individual set up daily meetings, including Fridays, at 4 PM with no end time. A room was chosen away from everyone's daily work and physically arranged so that everyone could see one another. Everyone had to be physically present and could only send a substitute if a personal emergency occurred. The company decided to pay for any necessary childcare and transportation of family members. The change team needed to be fully present during the daily meetings.

Little progress toward solutions occurred during the first two weeks. The meetings initially explored where everyone was in reference to the implementation of new processes and systems. The moderator encouraged all participants to share their thoughts and feelings and reassured everyone there would be no judgments or repercussions. The first week, the meetings lasted three to four hours. The duration eventually decreased to about two hours daily. Around the third week, the team started to see a way through their conflict. By the end of the fiscal quarter, seven weeks later, the company achieved its revenue goal and most customer commitments were met. There was still a long journey ahead but the team demonstrated their ability to learn quickly and solve seemingly impossible problems.

The daily dialogues at Pharma Supply took place over a year with a diminishing number of weekly meetings of shorter duration. The format of the meetings remained unchanged: everyone participated, openly shared their perspectives, listened to others, collaborated and made incremental progress. At the end of the year, the biggest effect everyone realized was how much they learned about themselves and each other. Strong relationships developed resulting in a high level of mutual trust. The change team, including new members, implemented future

projects faster and more successfully. The generative dialogue process at Pharma Supply resulted in a new capability of working together.

Emergent Themes and Insights

At Pharma Supply, the 4 PM sessions provided the team with the opportunity to engage in double and triple loop learning. Given the severity of the issues, they could have easily fallen into the trap of single loop learning. Fortunately they recognized how the team's thinking and ways of working generated the problems and leaders were willing to create a container for generative inquiry and transformative learning.

Isaacs (1999) makes the connection between dialogue as the process of thinking together and double and triple loop learning. In his dialogical model, Isaacs describes two stages. The first, reflective dialogue, explores underlying causes, rules, and assumptions to get to deeper questions and framing of problems. As was experienced at Pharma Supply, the second stage, generative dialogue creates the possibility for groups to develop unprecedented new insights and ways of working, resulting in a collective flow and ability to learn how to learn together.

Process for Engaging Participants in Conference Experiential Session

This session creates a forum for presenters and participants to share their perspectives on the challenges and opportunities in the three organizational domains to support a shift from knowledge power to generative inquiry. In small groups focused on the application of the theory to healthcare, business, or education, we will engage the following generative inquiry guiding questions.

- How might this approach support you in working with a needed change?
- How would you design a container to generative inquiry?
- What challenges might you encounter using this approach?
- How would you address those challenges through new processes and structures?

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Imaginal Ways of Mind & Heart Transformation

Jan Spafford and Catherine Lamond

Abstract

Our presentation aims to re-present our experiences of living with serious illness and loss as a transformative way of the Imaginal. This involves re-animating consciousness which can lead to a greater sense of Mystery.

We share experiences as personal storytelling to arrive at global and transpersonal perspectives as a unique way of transformation. In journeying we invite and meet with a unifying Renaissance Master Image to explore transformation as *Anima Mundi*, Soul of the World. We offer examples of conducted rituals, ritual theatre, reflective journaling and memory theatre to assist in this transformation of mind, heart, and soul.

Key Words

Transpersonal, Transformation, Spiritual, Imaginal, Ritual Drama, Storytelling

An Invitation to a Transformative Experience of Mind and Heart

At the heart of Hermes' teachings is one simple idea – God is a Big Mind. Everything which exists is a thought within the Mind of God. Your body is a thought within the Mind of God. (The Hermetica, xxxi)

Our work is rooted in a phenomenological understanding that lived experience can become a source for new or embodied wisdom. Thought may be perceived as expressions of mind and soul, collectively shared as symbolic patterns of a universal language. Memories may be re-animated and transformed through qualities of perception, and documented to create different experiences of an image.

This work is shared in brief moments and examples of transpersonal dramaturgy and journaling, which were conducted through sacred stages, rites of passage, ritual and initiation. A series of images or an experience can be stored in the form of 'living' journals, expressed in patterns of ritual theatre, and written as soul dramas. Insights found in reflective journals may be shared through participation of an image, witnessed and held as stories or mythologies in the dramatic moment.

These imaginal methods can be used to elevate challenging stories of serious illness, loss or grief. The shared 'lodging' for our collective experience is given as the *Anima-Mundi,* or Soul of the World, as a living context for transformative learning. The transpersonal experience itself is invited and guided by an alchemical masterwork from the High Renaissance, known as *Splendor Solis*. We share awareness through personification and active participation of an elevated image, perceptions of illness and suffering can be symbolically prepared and re-storied through a transpersonal lens of understanding. We meet the image as our teacher in the company of our 'daimons' (Hillman 1996) who help us to prepare through metaphor and questions.

An Invitation arrives from an Image:

Splendor Solis, Title Poem
I am the Way and the Level Road

Whosoever travels me without stumbling or stopping

Finds good lodging by day and by night

By him will I be held most dear,

And he who finishes his course

Will come to a goodly end. Amen.

(McLean 1991)

Centre Stage: *Anima-Mundi,* World Soul
In my end is my beginning

(Eliot; East Coker)

We enter a living stage of *Anima-Mundi*, beginning at the centre of an experience. We are invited by an image, preparing us for a transformative journey through ideas of perception, personification and cosmology. We learn that an image can be re-animated, inviting questions of phenomenology and knowledge. We ask phenomenological question, such as what counts as real? Ecological philosopher and writer, David Abram

prepares us for a new experience by framing a language of inquiry within, 'a more than human world.' (Abram 1997 p66) He connects us to a deeper understanding of life by inviting us to consider what is visible and what longs to be expressed:

The flesh of the world, a mysterious tissue .. underlies and gives rise to both the perceiver and the perceived, as interdependent aspects of its own spontaneous activity. (ibid p66)

Reflections as a shared experience:

Catherine:

My research involves an exploration of imaginal connections between embodiment, alchemy and theatre conducted in traditions of the Hermetic Arts. It grew from understandings of 'alchemical operations' as transformations, and further developed through the creation metaphor of the Tree of Life. The work became a transpersonal practice through dramaturgy, re-animated as 'leaves and branches.' My journey started as life stories which were held by the Title Poem as a 'lodging house' for transformative learning of grief and loss. The Poem inspired a 'way forwards' through the rhythmic nature of the iamb, acting as a metaphor for the heart and its artistic longing for self expression.

The transpersonal dramaturge employs text, letters, dialogues and images as sources for creating a dramatic process. My first source is from, 'A Note on Imaginal Inquiry' (Angelo, 2010) which introduces the imaginal process as a Renaissance art.   Angelo comments that the *Splendor Solis* provides an intersection between archetypal psychology (Hillman) western esotericism (Faivre.1994) and the seven Liberal Arts. This is explored through a threefold process in five methods, to cultivate the individual as a research tool, which activate the psychological tools of visionary imagination. The researcher as dramaturge is in role as journeyman, encountering 22 complex illuminations of the Renaissance master-work, known as the *Splendor Solis*. He or she 'enters the process figuratively and imaginatively as each image's frame of reference in turn.' The master reports on transformative learning experiences, as journals, commentary, and resulting dramaturgy. Dr Angelo comments, 'In this light, the *Splendor Solis* is not simply one alchemical work among many but a series of imagistic doors into an encyclopedic hermetic cosmos, tempered to each individual.' (Angelo, 2010)

Jan:

My transformative journey began with a direct confrontation with mortality that I experienced as a deep calling and 'initiation into the soul realm' (Shinoda- Bolen, 2007, p.6.) This metaphorical journey through an alchemical landscape has been illustrated and taught by the beautiful illuminations of the *Splendor Solis* and I have experienced the 'nature of a genuine journey into the imaginal world' (Angelo, 2004, p13.) 'learning how to see with the 'inner eye', to meet the image 'on its own ground and listen first to its own language'. (Angelo, 2005, p 20.)

Traveling through the world of *Anima Mundi,* has been like learning to speak a new language and follow a different path and I have learned to love it as it has enriched, enlarged, transformed and ultimately enlightened my life.

I have become devoted to keeping a journal and this has become the equivalent of 'work in the alchemical sense' that Thomas Moore has said 'is essential for the care of the soul' (Moore 1992. p 291)Journals are not just random collections of 'stuff'. They are collections of all sorts of different material, such as stories, poetry, art, drawings and reflections carefully put together and re- imagined. As Anderson says;

Everything may become 'raw material for scrutiny: relationships, dreams, bumper stickers, newspaper articles, chance encounters, casual conversations and synchronistic events' and lead to a greater depth of understanding so that the personal becomes universal. (Anderson, 1998, p84.)

From the beginning of my journey I have been 'traveling' with the archetype, Hekate, described by Professor of Greek and Latin, Sarah Johnston, who appears as the Goddess of Liminal Points and Thresholds and is associated with doorways and gates. (Johnston, 1990, p12.) Gradually I realized that the place I stand in, due to my life - threatening illness, is a liminal place, described by Shinoda Bolen as 'the border realm between life and death' (Shinoda- Bolen 2007). I became aware of Hekate accompanying me in these places.

Response: You are invited to respond to the Title Poem as a teacher. We make a move together towards the method of remembering by 'learning to trust an image.' (From a workshop by Dr Sue Michaelson, University of Chichester 2007) We find shared roots of experience in active imagination and imaginal inquiry, the cosmologies of an ancient world and an archetypal consciousness.

Visionary Imagination:

Catherine:

An imaginative epistemology of metaphorism is introduced by the *Solis* Poem. This beautiful image teaches us how to take metaphor seriously but not literally, employing techniques of active imagination (Jung) as an authentic path as a way of remembering or making new knowledge from ancient wisdom. We take steps, aligning new ways of knowing to ancient traditions through Jungian perception. Jung places the psychological tradition of visionary imagination as transformative tool within a mystical frame, which is re-imagined in an educational context (Schlam. 2006, Angelo 2003 in Angelo. Draft Course paper. 2009) Active Imagination operates in numerous traditions, such as Memory Theatre, (Yates,2003) Ritual, (Faivre 1994) Alchemy, Art-making, Story-telling and Dance (Hayes 2007): Ontologically imaginal inquiry is grounded in Corbin's translations of the Arabic mystical term alam al-mithal or 'world of image' (Corbin,1977)

Shared Experience:

Jan:

In my first journal I show how I became aware of the three faces of Hekate as maiden, mother and crone. I began by following an image through stories of Copper Woman (Cameron 1990); connecting archetypes of mother and old woman. My visit to Loe Pool, in Cornwall, led to ideas of mythology and place, which I experienced through the Lady of the Lake, as image of maiden. I learned that Hekate was guardian of the crossroads, boundaries, borderlands and thresholds. I found that Loe Pool was separated from the ocean by a stretch of beach with no outlet, representing worlds of experience as a real liminal space and, 'a silvery line in- between.'

This was the first time I used my camera to record the beauty of this 'enchanted' place. My photographs became a rich resource for continuing exploration and re-imagining and developed into a powerfully creative and transformative way of working.

Catherine:

I began with an image which quickly began a 'forest' of journals and materials. My dramaturgical 'forest' initiated a memory theatre and ritual of transformation. I made moves through visionary imagination, threading images from memory, embodiment and grief. A Memory theatre started to evolve through the iambic line of the heart, beginning with a question: 'And they say to her; Woman why dost thou weep?' *(*John, 20:13) Images of microcosm and macrocosm opened a way for transformation. I began contemplation of a healing image, unifying in the moment:

The world is primarily the totality of everything, Consisting of heaven and earth. In a mystical sense, it is appropriately identified as man. For, as the world has grown out of four elements, So does man consist of four humours (Isidore of Seville, A.D 560 – 636, De natura rerum, found in Roob, 2001 p16)

Intentional healing began a walking meditation, grounded in the moment. I found by combining practices of breathing with visionary imagination I was able to connect to a greater sense of spirit and humanity, and to learn from grief as a teacher of the transformative experience.

Auditory Imagination:

Jan: Alchemical Stories of Peacock 'Tails':

My Peacock 'Tails' began with my first meeting with the Peacock and of our subsequent encounters; most memorably on a road in Spain and then in Canada on my way to the home of Copper Woman.

These encounters formed a pattern and were connected in the Memory Theatre. A Course alumnus, Edwina Milner, began a continuing correspondence between Copper Woman and the 'peacock colors' of copper salts, as described by Nick Kollerstrom. (www.levity.com). She took the trouble to introduce me to the peacock and also to tell me about the 'conch shell of Venus that breathes through a tranquil copper process'. (ibid) Venus was credited with a sea origin and copper reminds us of this connection with the water element. All copper salts are sea colored, blue or green. All the ores and all the salts of copper are hydrated, water

containing. Nearly all copper salts are highly soluble in water. the iridescent hues of a peacock's tail derive from green - blue copper complexes.

There is a stage in the alchemical process called the *Cauda Pavonis* which according to most alchemists appears after the black / *nigredo* stage and before the white / *albedo* stage.   It is when all the colors of the rainbow appear 'which looks like a peacock displaying its luminous tail.' (Abraham, 2006, p142) This is an 'in- between' stage; a liminal place which promised dazzling insights, joy, colors, brightness and much personal transformation. Peacock became a 'symbol' for the liminal place in which I lived. A pioneer in linking psychology and astrology, Alice O Howell writes about the way in which a 'symbol can lead to a truth, which by extension can lead us to a greater truth... (which) spiral on up and out to greater and greater insights.' (1993 p20)

The serene and starry sky and shining sun are peacocks.
The deep blue firmament shining with a thousand brilliant eyes,
and the sun rich with the colours of the rainbow, present the
appearance of a peacock in all the splendour of its eye bespangled feathers

(Angelo de Gubernatis (1872) in Moore, T. (1982. p207)

Patterns of Imagination

Catherine:

We arrive at the place of water, the process of emotional healing, personal stories are represented as watery experiences for transformation. The auditory imagination unifies the inner and outer experience of storytelling, and is now represented as patterns that heal. In particular, we become aware of numbers and their connections between human life and cosmos. The creation of Memory Theatre is formed through the four elements and anticipates the fifth; Quintessence. Man can be re-presented as patterns of a five pointed star.

Jan:

The continued use of photography enabled active imagination to develop and began to feed my soul and bring 'outer experiences deep inside me' (Moore. 1994). Acknowledging my fear of water became significant: Reading Moore's work enabled me to identify with his assertion that 'life is a body of water, beautiful and inviting, but always ready to swallow me up' (1997 p17). In addition Jung's work reflects my fears exactly in describing the ocean as 'the symbol of the collective unconscious, because unfathomed depths lie concealed beneath its reflecting surface' (Jung 1973. p.48) I became aware that my fear of water re-presented something that was 'cut off and buried in the unconscious' (Shinoda-Bolen 2007. p 60)

I embarked upon a much greater exploration and re imagining of water through movement and drawing, art and poetry and eventually some actual experience!! My experience of synchronicity is illustrated by my own drawings of myself under water, a postcard of a Japanese woman under a waterfall and a photograph of me under the hot springs in Canada. (page 25. Journal September 2009) As Barbara Somers says;

' A synchronous happening is our recognition of the oneness, that all things do belong together. What is outside is also inside, what is inside is also outside- and at the same time' (2002. p 240)

In my most recent process the sculpture of 'Scallop' by Maggi Hambling, became significant because of its link with the ocean and the words from Benjamin Britten's Opera; Peter Grimes (1945) that are cut through the steel at the top of the sculpture: 'I Hear Those Voices That Will Not Be Drowned' These words went straight to a deep and inner part of me and have remained as a powerful symbol of my journey. Here was Venus again too - born of the sea and riding on a scallop shell , an ancient symbol of pilgrimage. (Cooper. 2008)

Rejoining: the Transformed Learning of Experience:

Catherine:

We meet in the place of fire – the active transformation as all is re-joined and forms a new story and a ritual practice - lighting a fire to dialogue with the heart of transformation. we begin to contemplate a response to our experience.

Jan:

As I became more aware of Hekate's company on my journey I was grateful to have some of her 'particular wisdom' with me. This is the 'body - soul knowledge about life - death - life that we gain some more of each time we make a descent into the underworld of shared human experience and suffering' (Shinoda Bolen. 2007. p218.)

My understanding of Hekate was transformed by new knowledge from Sarah Iles Johnston who has collated evidence to support Hekate's role as 'the goddess who ensouls the universe and all in it (1990, p153).

This discovery of Hekate's special cosmological role of responsibility for the 'conveyance of ideas between the intelligible and the sensible Worlds' (p169) inspired me to re consider my notions of the liminal space. Bringing all the themes and messages together I was at last able to acknowledge properly all the 'dazzling' messages that I had received from the peacock and was able to re-imagine the liminal space as a place where I could see and experience the 'sacred dimensions of everyday life' as discussed and described by Thomas Moore (1994. p.214)

I reached a place of peace, wonder and enthusiasm where fear and dread have their own place and even the darkest places have their own light. This kind of light is described by Jungian Analyst and author, Stanton Marlan as 'the darkness that shines' (2005. p12.)

Response: You are now invited to make a response to your journey and experience.

The Quintessence – Self Knowledge as a Five Pointed Star
Catherine:

The practice of distilling from the above elements and the formation of as a Memory Theatre results in a transformative learning experience; we realize a shared culture of growing awareness, the sense of renewed self and an epistemology or theory of knowing. We conclude in the sharing and discussing of the imaginal process and where it might lead.

Go Deeper than Love

Go deeper than love, for the soul has greater depths,
love is like the grass, but the heart is deep wild rock
molten, yet dense and permanent.
Go down to your deep old heart, and lose sight of yourself.
And lose sight of me, the me whom you turbulently loved.
Let us lose sight of ourselves, and break the mirrors.
For the fierce curve of our lives is moving again to the depths
out of sight, in the deep living heart.

~ D.H. Lawrence ~
From; Know Thyself, Know Thyself More Deeply

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Examining the Role of Media in Weight Discrimination and the Transformative Learning Process

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Abstract

Conference attendees are invited to make space for dialogue regarding media's portrayal of obesity. Web 2.0 technology in the form of an iMovie will be used during the symposium to depict how obesity is positioned in the media and to serve as a platform to critically examine how media impact personal beliefs and assumptions of this disease that can impact the adult learner and facilitate transformative learning.

Background and Purpose

The evolving exploitation of weight status in popular culture, coupled with the urgent need to critically address the largest health epidemic our nation has ever seen, sparked several questions that led to this paper. Questions include what impact does the media have on the obesity epidemic, and in what ways does media impact a transformative learning experience associated with obesity, weight status, and weight discrimination? Historically, individuals have learned about health from popular culture, but recent reality television and other media platforms have taken a potentially more harmful approach to this subject. With a lack of evidence for successful weight loss maintenance, and the failure of almost all public health interventions, it is time to approach the obesity epidemic from a different angle. Further research is needed to explore how successful weight loss individuals made meaning of the weight stigma and discrimination that they faced and how this obesity discourse impacted their motivation for change. Specifically, how does media influence living with obesity, and is media eventually critically reflected upon? How can negative media concerning a disease status influence those impacted by that disease? And, how can this type of media impact transformative learning in the adult learner?

I will address these questions in the following three sections. First, I will begin by introducing the current state of obesity. Then, I address how weight status is positioned in the media and its impact. Thirdly, I will pose questions on how transformative learning, informed by critical public pedagogy and media literacy, could potentially impact this disease. Lastly, I will discuss the implications of the media's portrayal of obesity to adult education and future obesity prevention efforts. This paper creates an argument for further research in adult obesity prevention and health education that emphasizes the need to facilitate transformative learning.

The War with Obesity

The Center for Disease Control and Prevention (CDC) (2011) noted that the prevalence of overweight and obese adults has steadily increased over the years across gender, age, race, ethnicity, and educational levels. More than two-thirds of American adults are either obese or overweight (Flegal, Caroll, & Odgen, 2010). Obesity is defined by excessive body fat in relation to lean body mass, while overweight refers to increased body weight in relation to weight (Stunkard & Wadden, 1993). Larger adiposity (body fat) has been associated with the increased probability of developing often life-threatening diseases that may lead to increased morbidity (Stroebe, 2008). Fortunately, even modest weight loss can reduce health risk (Pi-Sunyer, Blackburn, Brancati, Bray, Bright, & Clark, 2007). In addition to the medical impact of obesity, there is an economic burden (Colditz, 1999), and social and psychological stressors (Puhl & Latner, 2007).

Americans live in an 'obesogenic' environment, characterized by messages, products, schedules, and places that promote increased food intake, unhealthy foods, and physical inactivity (Center for Disease Control and Prevention, 2011). The obesity epidemic is a complex issue that involves government, healthcare, education, industry, media, family and individual efforts for collaboration and change. There are many forces behind an individual's weight gain including; economics, food marketing, socio-cultural disparities, changes in agriculture, sedentary lifestyles, influence of industry, culture and media.

Although science has made strides in metabolic, environmental, and genetic influences that may impact weight, the question of determining on an individual level who will achieve successful long-term weight loss remains unsolved. For those individuals who have lost weight, little is known of this experience and its impact on learning outcomes and learning processes that could lead to permanent behavioral and cognitive changes. In fact, many studies have confirmed that weight loss is often not a permanent change, with individuals regaining weight over time (Jeffery, Drewnowski, Epstein, Stunkard, Wilson, & Wing, 2000).

Additionally, the war with obesity is not only concentrated on the individual, but on the systematic philosophical approach of the four primary groups; antiobesity researchers, antiobesity activists, fat acceptance researchers, and fat acceptance activists are all at "the forefront of framing positions over the nature and consequences of excess body weight" (Saguey & Riley, 2005, p. 869). These often conflicting positions have facilitated an obesity discourse.

Obesity Discourse

The fear of fat has created many ways to frame this situation, which is often associated with social problems (Hilgarten & Bosk, 1988, cited in Saguey & Riley, 2005). As a result there are many mixed public messages that create a larger discourse. The obesity discourse is often separated into two divergent socio-cultural perspectives; the first associates obesity with the lack of willpower, and the second views obesity as a systemic societal problem. The outcome of the latter positions obesity into the small category of chronic diseases that come with a "blaming the victim" mentality, or the belief that obesity is a result of voluntary bad habits, and often is implicitly associated with laziness, gluttony, bad hygiene, and lack of education (Puhl & Brownell, 2003; Puhl & Heuer, 2010; Puhl, Moss-Racusin, Schwartz & Brownell, 2007). These conflicting epistemological views on how to approach the problem of increased obesity creates additional barriers for obese persons (Goldstein, 2005).

The media have quickly leveraged the personal responsibility position and the public fear and confusion surrounding this disease. The media picked up on the lack of successful medical and government attention to this epidemic and as a result, a plethora of commercial weight loss programs and reality television programs focusing on the obese have recently been established in the United States (Cleland, Graybill, Hubbard, Khan, Stern, & Wadden, 2001). There has been a "rogue's gallery of rascals and snake oil-salesman, a library of junk science and nutritional gibberish, and a catalogue of nonsense cures and commercial hustle" (Goldstien, 2005, p. 385).

Weight Status Positioned in Media

The media play a large role in constructing the language used around this epidemic, which relies heavily on "weight, morality, risk, and science" (Boero, 2007, p.42). Because of the social undertones of this epidemic you could assume that obesity would follow the footsteps of breast cancer or AIDS, to be supported by community, policy, and corporate backing (Boero, 2007). But Boero (2007) defines obesity as a "post-modern epidemic, in which ostensible concern for public health is diverted from structural forces the focus is turned squarely on the individual" (p. 58). There is no better example of this than reality television.

Recently, weight-focused reality media have been studied from the angle of changing individual's worldviews or actions. Reality media in the United States such as *We're Killing the Kids, Supersize* and *Superskinny, The Biggest Loser* and *Celebrity Fit Club* carry health messages with undertones of ethics, values, and how individuals should behave, which in most cases is in accordance with the dominant ideology (Evans, 2006, cited in Rich 2011). The manner in which obesity is positioned in this type of media offers important insight into the ways the public learns about health (Rich, 2011). The media send pervasive messages about obesity that can influence worldviews on individual responsibility, ways of thinking about large body sizes, what constitutes beauty, and overall health education. How can media and other social spectrums impact individual learning processes in relation to weight loss?

Popular culture, which includes mass media, works to reinforce dominant values of beauty and self-worth and is often seen as a form of education for the American public (Sandlin, 2007). This type of public miseducation, as related to obesity discourse, guarantees continued controversy on how to approach treatment of this disease. The view of obesity through this medium is often seen in a multitude of forms, from the constant ridicule of obese persons in television and film, to the media's portrayal of "blaming the victim" rhetoric in the majority of news coverage, magnifying the causes of weight gain at the individual level.

It is important to note that 'Fattertainment' (Heuer, 2011) in film and weight loss television are what Giroux calls "teaching machines" (Giroux, 1995, cited in Hoechsmann & Poyntz, 2012, p. 50). However, I would agree with Evans (2006) that the majority of these shows carry moral overtones on how individuals should behave. For example, we often see weight loss reality television shows like *The Biggest Loser* successfully "transform" the body shapes of the super obese. The show has contestants shed pounds to win a prize. Scare tactics, positive reinforcement, supporting relationships, and old fashioned 'blood, sweat, and tears' approaches are used on these television shows to have participants "embark on a journey that is concerned with transforming and perfecting the flawed version of self that has been rather literally 'exposed' at the initial weigh-in" (Hoeschsmann & Poyntz, 2012, p. 69).

These popular reality television shows depict the de-humanization of persons with obesity who are trying multiple avenues to escape their dreadful overweight bodies developed from extra pounds which are not acceptable by the dominant ideology of beauty or thinness. Along this journey, contestants can be seen as taking full blame for their failure to reject the neoliberal politics, and the responsibilities to govern themselves by (Hoeschsmann & Poyntz, 2012). The "winner" of these shows has transformed themselves by "embracing self-governance, regulating and reforming themselves on behalf of their family and the nation" (Hoeschsmann & Poyntz, 2012, p. 71). And many times this 'transformation' is built upon the artificial environment created by the show which comprises lifestyle experts who work together to establish a bulletproof environment with little room for error. Yet, what we don't see is the unhealthy environments that the contestants often go back to, nor does television follow these contestants over a period of time to see the inevitable weight gain due to the frames of references and perspectives that were not challenged or changed along this usually one-dimensional process. This type of programming often creates weight stigma.

Weight Stigma

This socially constructed powerful fear of fat is perpetuated by the negative portrayal of obese individuals in the media which aids in weight stigma and discrimination (Heuer, 2011). The fear and moral panic of fatness helps discrimination to persist, which is challenging to the individual weight loss battle. Discrimination of obese persons negatively impacts health, and interferes with many public health intervention efforts (Puhl & Heuer, 2010). The mass media are a compelling example of the social acceptability of weight stigma (Heuer, McClure, & Puhl, 2011). Stigma through this medium is often seen in a multitude of forms, from the constant ridicule of persons who are obese in television and film, to the media's portrayal of blaming the victim in the majority of news coverage, magnifying the individual level causes of weight gain (Heuer, et.al, 2011). When individuals feel stigmatized, they are vulnerable to depression and low self-esteem, they are less likely to feel motivated to adopt lifestyle changes, and they are more likely to turn to unhealthy eating patterns for comfort (Carr & Friedman, 2005; Myers & Rosen; 1999; Wang, Brownell & Wadden, 2004).

Transformative Learning, Critical Media Literacy, & Critical Public Pedagogy: Influences on Weight

The implicit messages that are channeled through reality television and news coverage are how individuals read the world and create assumptions and beliefs on gender, race, beauty, and culture. How do messages received through media impact learning and behaviors associated with weight status? Television, in the context of weight, creates a didactic relationship between the viewer and content of the shows. Learning how to critically analyze and deconstruct the positionality of obesity on TV, paying specific attention to power relations and representation of images, may assist individuals to better understand how media present an argument of obesity as a personal, moral responsibility. This position hinders public policy, treatment of obesity, and creates a market for mass media. I must mention that not all reality television shows are the same. A few are critical to disrupting the dominant discourse on obesity's causes. For instance, *Jamie Oliver's Food Revolution* does raise consciousness and shape political discussions (Giroux, 2008) regarding the food industry.

Critical media literacy and critical public pedagogy also inform transformative learning, as media "affects our beliefs about ourselves" (Tisdell, 2008, p. 52) Critical media literacy, or a "set of competencies that enables us to interpret media texts and institutions, to make our own media, and to recognize and engage with social and political influence of media in everyday life" is an important skill for individuals who struggle with weight (Hoeschsmann & Poyntz, 2012, p. 1). Critical public pedagogy which refers to "the education provided by popular culture; popular culture teaches audiences and participants through the ways it represents people and issues and the kinds of discourses it creates and disseminates" (Sandlin, 2007, p. 76). Reality media are a part of the space which creates obesity discourse where individuals come to learn about their bodies and health.

By critically analyzing weight loss television shows, or "Fattertainment" (Heuer, 2011) individuals may better understand how obesity is positioned as personal responsibility, which creates barriers to the weight loss battle. Media have a conscious and unconscious effect on "what" we think and "how" we think about both social and personal issues (Tisdell, 2008). As adult educators, we realize that media have the power to educate and "miseducate". With the topic of obesity prevention and weight loss, the media often reinforce dominant ideology. Media, particularly when dealing with assumptions regarding overweight individuals that are built into "TV interventions", can influence the public to side with the opinion that weight gain is a personal responsibility. These assumptions make it difficult for consumers to interpret and reflect on health messages.

Research supports a connection between adult learning and this type of popular culture, noting that "popular culture influences individual worldviews" (Tisdell, 2008; Tisdell & Thompson, 2007, Wright, 2007a,

2007b cited in Wright & Sandlin, 2009, p. 119). As Tisdell (2008) noted "there is no question that media has the power to challenge one's assumptions" (p. 62). Media can assist individuals to think about obesity issues and their own assumptions in different ways, a main objective of transformative learning (Mezirow, 1991). As noted by Giddens "questions about social, economic, and technical structures should not be approached separately from questions about human agency" (Giddens, 1976, 1984, 1990, cited in Hoechsmann & Poyntz, 2012, p. 40). Media can impact human experience and the ability to act and make changes in the world. These types of reality programming serve as public pedagogy, producing meaning. And for those audience members who feel bound by the disease that these shows aim to cure, the question remains; what impact does media have on their weight loss battle, and how does this impact transformative learning about their bodies?

Implications for Adult Education and Obesity Prevention

Considerable attention to the concept of transformative learning in the healthcare and the adult learning literature often refer to people being transformed, or changed by the experience of living with a chronic disease. Weight loss can be a life changing catalyst resulting in identity development, yet little is known about how this learning process occurs in light of the competing factors that impact society's view of this disease, with specific attention to media. Research, to date, provides a foundation to study the experience of weight loss through a critical transformational learning lens informed by critical public pedagogy.

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To See the Truth in Another's Point of View: Interactions with Diverse Peers as a Catalyst for Transformative Learning

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Abstract

The authors discuss how theories of transformative learning, self-authorship and interactional diversity are framing a study of student experiences on a highly diverse community college campus in New York City. The researcher is exploring how critical incidents in students' experiences with diverse peers may create the kind of disequilibrium that many scholars believe is necessary for higher levels of critical thinking and perspective transformation. Participants are reflecting on the possible connection between their experiences with diverse peers and their capacities to question their own assumptions, engage with diverse perspectives and revise prior assumptions in the face of new information.

Introduction

To understand someone else is to see the justice, the truth of their position. And that is what transforms us. And if we have to become part of a new world civilization, if this is our task, then we shall need a philosophy which teaches us to see the justification for the other's point of view and which makes us doubt our own.

Hans Georg-Gadamer (1992)

Preparing students to become effective citizens of an increasingly connected and interdependent world is one of today's most critical challenges. Knowledge about other nations and the ability to communicate across diverse cultures are widely recognized as essential tools for global citizenship. However, bridging the current divides of culture, race, nationality, ethnicity and religion may call for something more than new knowledge or behavior. As Gadamer observed, understanding others in this new world also requires that citizens deeply question their own assumptions and be able to see the truth in another's viewpoint. Educators seeking to prepare students for a global world should re-visit the traditional construct of perspective-taking, commonly defined as the ability to take the perspectives of others.

The research described in this paper focuses on the ways in which interactions in highly diverse contexts may contribute to the perspective-taking abilities of adult students. It explores the role that critical incidents (Brookfield, 1990; Cassell, 2004) with diverse peers play in students' ability to question their assumptions and world views and to consider alternative views. The researcher goes beyond traditional framings of perspective-taking to examine how such interactions may prompt individuals to transform their original perspectives and develop greater capacity for self-authorship. Borrowing from the scholarship of transformative learning, self-authorship and interactional diversity, perspective-taking is defined, here as: the capacity to question the assumptions underlying one's own perspective, to engage with diverse perspectives, and to be able and willing to revise one's prior assumptions in the face of new information. To establish the theoretical framing for this study, we offer a very brief description of each of the key areas of scholarship.

Perspective-Taking & Transformation

Researchers in various disciplines have contributed to the scholarship on perspective-taking in the eighty years since this concept was discussed by Piaget (1932, 1967) and Mead (1934). Despite Piaget's acknowledgement of the non-cognitive dimensions of perspective-taking, much of the literature of the past thirty years has privileged its cognitive and rational dimensions. Scholars have studied perspective-taking as it relates to cognition, moral reasoning and empathy. Others have examined the role perspective-taking ability may play in reducing stereotypes and increasing altruism. Perspective-taking in these contexts is often cast as a skill employed in the service of other

goals or linked with an individual's ability to "try on" the perspectives of others. Seldom do scholars discuss intrapersonal aspects of perspective-taking, such as the ability to reflect upon and perhaps revise prior assumptions.

We suggest that the current scholarship on perspective-taking can be strengthened by fuller integration of the work of an educational scholar whose theory is not often referenced in the many accounts of perspective-taking found in the literature of psychology and human development. Mezirow's (1978) study of women returning to college and their experiences with consciousness-raising led to the development of his theory of transformative learning, the centerpiece of which he calls perspective transformation (1990). Mezirow proposed that perspective-taking is triggered by "a disorienting dilemma" or precipitating event (1991). Since Mezirow's original study, he and others have produced an extensive body of research and scholarship on perspective transformation theory. In the process, they have engaged in a sustained international and scholarly dialogue that has broadened Mezirow's concept in theory and practice. Mezirow's focus on revising meaning perspectives seems to us a clear extension of the scholarship on perspective-taking and provided a response to Gadamer's call for a "philosophy which teaches us to see the justification for another's point of view and which makes us doubt our own" (Gadamer, 1992).

More recently, Martin, Sokol & Elfer (2008), building on Selman's (1971, 1975) foundational work on levels of perspective-taking, expanded the discussion of perspective-taking to address more profound changes in perspectives. Martin and his colleagues identified a more advanced level of perspective-taking through which "children and adolescents come to understand themselves and others as possibly orienting to common situations from distinctly different perspectives that must be coordinated if requisite levels of understanding and collective action are to be achieved" (2008, p. 313). "Orienting to common situations from distinctly different perspectives" is precisely the task facing students on highly diverse campuses.

Self-Authorship

A second conversation shaping this study is found in the scholarship on self-authorship (Kegan, 1982, 1994), which Kegan described as a level of development in which adults "are able to look at and evaluate the values and beliefs of [their] own psychological and cultural inheritance rather than be captive of those values and beliefs" (1994, p. 309). Baxter-Magolda (1999) who has extended Kegan's work through longitudinal studies of four-year college students, observed that in developing self-authorship, "students must be willing to revise what they have previously held as certain by shifting perspectives" (p. 14).

Self-authorship is grounded in theories of cognitive development (Piaget, 1932; Perry, 1970) or ways of knowing (Belenky, Clinchy, Tarule & Goldberger, 1986) and in constructive-developmental research and theory on how individuals make meaning of and author their social worlds (Kegan, 1982, 1994; Baxter-Magolda, 1992, 2010). Central to this conversation of self-authorship is Kegan's (1982, 1994) levels or orders of thinking through which individuals move from a dependence on external authorities to the development of a clear internal authority and the ability to author their own stories. Of special importance to this research study of perspective-taking and encounters with diversity is the transition from Kegan's third order, in which individuals are socialized into the ways of their family and community, to the fourth order, in which they begin to be able to examine the assumptions underlying their world views and to acquire the capacity for self-authorship.

Kegan (1994) observed that third order thinking occurs in late adolescence or early adulthood, and is the highest level most adults may ever reach. In this stage, which he called the "socialized mind", individuals develop the ability to think abstractly and are socialized into the norms of their society, what Gadamer (1975) described as "understanding ourselves in a self-evident way in the family, society and state in which we live" (p. 278). At one time, the attainment of third order consciousness might have been sufficient to meet the demands of daily life. Adults did not move very far outside their immediate families, faith communities and neighborhoods; skill in dealing with different world views was not required.

Kegan argued that movement from the third to fourth order thinking or "self-authoring" consciousness is necessary in our pluralistic, post-modern world (deBold, 2002). As individuals progress in this stage, they begin to develop the ability to see their own perspective as perhaps one among many. Most importantly they see that they have the ability to author new stories for themselves. Kegan suggested that with the ability to self-author comes an even greater capacity to consider and appreciate others' viewpoints. Recently, some scholars have begun look at self-authorship within specific groups that have not been highlighted in previous studies. Critical to this

conversation is new research on self-authorship that has been conducted with Latinos, lesbians and high risk college students (Torres, 2010; Jones, 2010; Pizzolato, 2003).

Interactional Diversity

A final and important area of scholarship that informs this study is the extensive and robust body of research on interactions with diverse peers. These studies are rooted in both the early sociological research on inter-group relations (Allport, 1954) and in the original studies on college campuses that first pointed to the importance of interaction with peers on students' educational outcomes (Newcomb, 1943, Feldman & Newcomb, 1969).

Subsequent research has affirmed this finding (Kuh, 1993, 1995; Pascarella and Terenzini, 2005). It has underscored the significance of informal interaction with diverse peers, what Gurin (1999) called "interactional diversity", and its link to important learning and civic outcomes (Hurtado & DeAngelo, 2012; Reason, 2011; Hurtado, 2007; Gurin, 1999). Recent studies have noted the role of interactional diversity in creating the kind of disequilibrium, discontinuities, or discrepant experiences (Gurin, 1999; Gurin et al, 2002; Hurtado, 2005, 2007) that have been found to lead to increased openness and cognitive complexity, and ultimately to greater ability to take the perspectives of others. Hurtado (2007) concluded that:

> Diversity in the student body provides the kind of experience base and discontinuity
> needed to evince more active thinking processes among students, moving them from their own
> embedded world views to consider those of another (or those of their diverse peers)." (p. 189)

Hurtado's linking of campus diversity to students' ability to consider the world views of another is based in part on an extensive analysis of national data on students from more than 200 colleges and universities collected by the Cooperative Institutional Research Program (CIRP) and the Higher Education Research Institute at UCLA, the Michigan State Survey, and Michigan's Intergroup Relations, Conflict and Community Program. Gurin (1999) examined the effect of structural diversity, classroom diversity and informal interactional diversity and found that "students who had experienced the most diversity in classroom settings and in informal interactions with peers showed the greatest engagement in active thinking processes, growth in intellectual engagement and motivation, and growth in intellectual and academic skills" (p.45).

Informal interactional diversity, which Gurin and her colleagues said may include things like informal discussions, daily interaction and social activities, was found to be "influential for all groups in the survey and more influential than classroom diversity" (Gurin, Dey, Hurtado, and Gurin, 2002, p. 353). These findings were subsequently corroborated in a study of 10 public universities which extended the previous research by examining the frequency, quality, context and variety of interactions with diverse peers (Hurtado, 2007, p. 191). The researchers found that "students who reported positive, informal interactions with diverse peers had higher scores on measures of more complex thinking about people and their behavior, cultural and social awareness, and perspective taking skills" (p. 191).
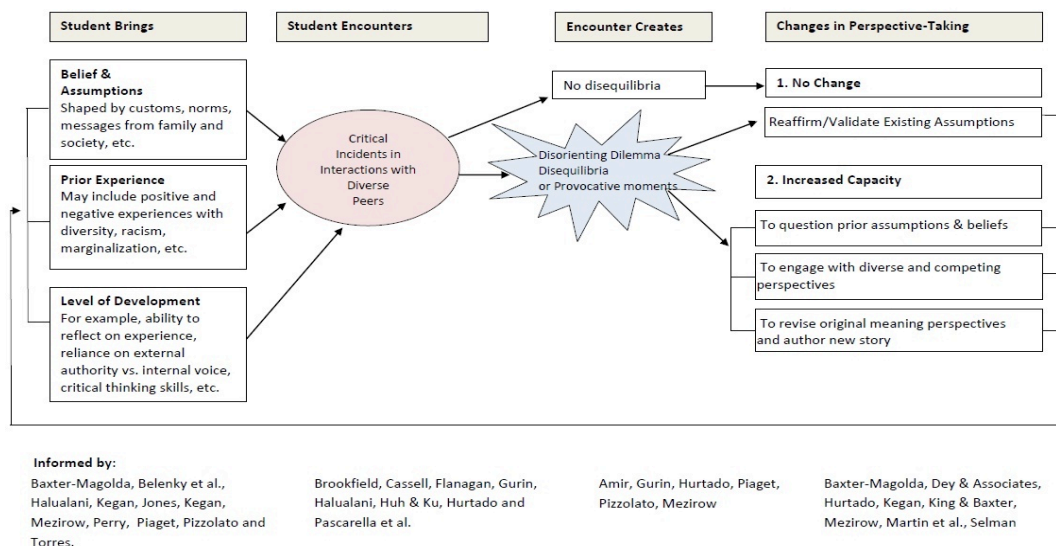
Halualani's (2008) study of students at a multicultural university remains one of the few qualitative studies of students' inter-cultural contacts with peers conducted on a highly diverse campus. Concerned that past research in her field had "overlooked how individuals and cultural groups actually experience intercultural contact in the messiness of real life" (2008, p. 3), she asked students to speak about how they define and make sense of their contacts with culturally different peers. In doing so, Halualani cast useful light on how students construct the meaning of their contacts with diverse peers and on the importance of conducting such research in a multicultural setting. Her conclusion that students hold more complex and nuanced views of intercultural contact than previously acknowledged in the literature helped to shape both the design and execution of this study.

A Proposed Model

We are proposing that acquiring the capacity for perspective-taking involves aspects of both learning and development and occurs in a social context. With this in mind, we have offered an inter-disciplinary frame for understanding perspective-taking that includes a constructive-developmental theory (self-authorship), an adult learning theory (transformational learning), and a theory that is rooted in intergroup contact research (interactional diversity). These important scholarly conversations (perspective-taking and transformation, self-authorship, and interactional diversity) are often occurring in isolation from one another but taken together, they form a useful

framework for this research study of how informal interactions with diverse peers may be related to college students' capacities for perspective-taking.

The diagram below illustrates how these three literatures work together to inform our current understanding of how interactions with diverse peers may contribute to a greater capacity for perspective-taking.

| Student Brings | Student Encounters | Encounter Creates | Changes in Perspective-Taking |

Belief & Assumptions
Shaped by customs, norms, messages from family and society, etc.

Prior Experience
May include positive and negative experiences with diversity, racism, marginalization, etc.

Level of Development
For example, ability to reflect on experience, reliance on external authority vs. internal voice, critical thinking skills, etc.

Critical Incidents in Interactions with Diverse Peers

Disorienting Dilemma Disequilibria or Provocative moments

No disequilibria

1. No Change

Reaffirm/Validate Existing Assumptions

2. Increased Capacity

To question prior assumptions & beliefs

To engage with diverse and competing perspectives

To revise original meaning perspectives and author new story

Informed by:
Baxter-Magolda, Belenky et al., Halualani, Kegan, Jones, Kegan, Mezirow, Perry, Piaget, Pizzolato and Torres.

Brookfield, Cassell, Flanagan, Gurin, Halualani, Huh & Ku, Hurtado and Pascarella et al.

Amir, Gurin, Hurtado, Piaget, Pizzolato, Mezirow

Baxter-Magolda, Dey & Associates, Hurtado, Kegan, King & Baxter, Mezirow, Martin et al., Selman

Critical Incidents with Diversity and the Capacity for Perspective-Taking
A Model in Progress

The proposed model places interactions with diverse peers at the center of a process of learning and development that begins before the student arrives on the campus and may lead to a greater capacity for perspective-taking. It is not a linear model, but a recursive and iterative one, in which what is learned through interactions with diversity, informs future interactions. It reflects our assumption that in some cases, encounters with diversity may not create disequilibrium or changes in perspective-taking ability. It is hoped that the research study will inform our understanding of why the challenges provided by interactional diversity may prompt some students to question their assumptions, consider alternatives and develop new "more inclusive, discriminating and permeable" perspectives (Mezirow, 1990, p. 14).

Setting for the Study

The community college that is the setting for this study is arguably one of the most highly diverse and international college campuses in the United States. Students come to the college from more than 160 countries and speak more than 126 languages. The student body is 36% Latino, 15% Black, 18% Asian, 11% White and 20% other ethnic origin/unknown. Fifty-four percent of students were born in another country and most are the first in their families to attend college (LaGuardia Community College, 2011). The student body reflects the social and demographic make-up of the dynamic urban community that surrounds it. Very few researchers have studied the impacts of interactional diversity from the perspective of such a diverse student population.

Closing

Until recently, much of the research on interactional diversity has been conducted using institutional data drawn from large-scale surveys (Gurin, 1999; Gurin, Dey, Hurtado, & Gurin, 2002; Hurtado & DeAngelo, 2012, Dey & Associates, 2010). These studies have created a robust and important body of literature. But without more qualitative research, scholars and practitioners may only be seeing what educational philosopher Maxine Greene calls "trends and tendencies rather than the intentionality and concreteness of everyday life" (1995, p. 10). Large

scale studies also don't provide an opportunity for students to help shape the conversations, define the terms, or determine what is important to be included, and how it is discussed. This qualitative study, featuring semi-structured, open-ended questions will enable students to enter into a dialogue with the researcher.

Findings from this study will document, in participants' voices, their experiences of their interactions with others in highly diverse settings and the way they make meaning of those experiences. This study will also chronicle what participants identify to be critical incidents in their interactions with others and their perceptions of how these incidents may have changed the way they understand themselves and others - and contributed to their capacity for perspective-taking. We believe that embedding the important constructs of perspective transformation and self-authorship in this conversation about perspective-taking creates an opportunity to deepen the discussion of perspective-taking to include intrapersonal development. We believe this is a critical part of preparing students to be effective global citizens.

Format for this session

The presenters will provide a short introduction to the theoretical framework that is shaping this study and share some stories from the early interviews. Through individual reflection and paired interviews, session participants will be engaged in a discussion of the ways in which their own experiences with diversity may have created disequilibrium and led to a greater capacity for perspective-taking. This interactive discussion will be followed by reflection and discussion in the full group.

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Spirituality and Culture in Transformative Learning as the Pursuit of Wisdom: A Workshop

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Abstract

This paper considers cross-cultural perspectives on the meaning of wisdom; reports the findings of a longitudinal study on the spiritual development a multicultural group of 31 adult educators over a 10 year period related to spirituality and the pursuit of wisdom; and considers what this means for transformative learning practice.

Most who teach and/or conduct research hope that the knowledge that they generate or pass on makes a difference in the world. They hope that it helps "re-imagine learning for a transforming world" as the theme of this conference states, and does so with wisdom.   For many, this connection to the pursuit of wisdom in a global world requires attending to the spiritual and cultural context of people's lives. Thus the purpose of this collaborative workshop (led by an adult educator and a psychotherapist) is to explore what it means for teachers and counselors who work with adult learners to educate for wisdom and transformative learning (TL) while attending to its spiritual and cultural dimensions. In particular, it is to: a) engage learners in exercises on cross cultural perspectives on the meaning of wisdom; b) report the findings of a longitudinal study on the spiritual development a multicultural group of 31 adult educators over a 10 year period, including their transformative learning experiences related to spirituality and the pursuit of wisdom; and c) offer specific guidelines for educational and counseling practice that aim to facilitate the development of wisdom and transformative learning.

Theoretical Grounding and Workshop Design

There has been little discussion of wisdom in adult and higher education, and limited research on wisdom among counselors and educators, and with some exception (Bassett, 2005), little direct discussion of its connection to transformative learning. The intent of this workshop is to combine knowledge from both research and practice. It fundamentally asks participants to explore the role of higher, adult, and counselor education, in grappling with the Big Questions of who we are, why we're here, and what gives life meaning (Douglas-Klotz, 2011). Indeed such questions are the subject of many of the world's great religions, wisdom traditions, and Indigenous cultures (Smith, 1994, Morgan, 2003).   These Big Questions lead to others—about the nature of knowledge itself, and the place of different types of knowledge including spirituality and wisdom, in teaching and research in higher and adult education (Sareth, 2006), and in teaching or counseling practice.

The workshop will draw to some extent on discussions of TL grounded in Mezirow's framework and the extended research that indicates for many people TL experiences extend beyond rationality as discussed by numerous authors in the recent There have been many discussions in recent years that have extended discussions of TL to include the extra-rational (TL across multiple disciplines (see the many authors in the new Taylor & Cranton, 2012 Handbook on TL). In particular this session is grounded in the cultural-spiritual discourses of TL (Brooks, 2000; Tisdell, 2003) that Taylor (2008) discusses in analyzing the discourses of transformative learning.

There has been an increasing discussion of the role of spirituality in higher and adult education in the past decade. In 2000, Laura Rendón called upon academics to reconnect "the scientific mind with the spirit's artistry" (p. 1) in their teaching and research.   Many academics answered her call, and there have been numerous publications on the role of spirituality in higher and adult education (Astin, Astin, & Lindholm, 2011; Chickering, Dalton, & Stamm, 2006; English, 2005); some authors have also discussed the relationship between spirituality and culture in teaching and learning (Dillard, 2006; Shahjahan, 2004; Tisdell, 2003). Nevertheless, aside from a recent sourcebook on adult education and the pursuit of wisdom (edited by Tisdell & Swartz, 2011), there has been little direct consideration of wisdom in adult and higher education. The workshop is intended to begin to respond to this concern.

The workshop begins by engaging participants in exercises designed to elicit both their understanding of wisdom (as connected to transformative learning), and what it means to engage with others of different cultural backgrounds. This is followed by an example of one Indigenous approach to wisdom, that of the Alaska Native Yup'ik culture. Two additional exercises are included. The first exercise involves exploration of the cultural influences on one's own worldview, followed by a related exercise that increases of the ways in which privilege has shaped this worldview, using the Hays' (2006) ADDRESSING framework for considering cultural complexity,

where "ADDRESSING" is an acronym that stands for "**A**ge and generational influences, **D**evelopmental and acquired **D**isabilities, **R**eligion and spiritual orientation, **E**thnicity, **S**ocioeconomic status, **S**exual orientation, **I**ndigenous heritage, **N**ational origin, and **G**ender" (Hays, 2006, p. 5). The remaining sections focus on a consideration of approaches to wisdom, and the findings of a longitudinal study relating spirituality and the pursuit of wisdom.

Approaches to Wisdom

Wisdom is difficult to define. It is often associated with age and experience, yet it is not limited to either of these. There is also an integrative quality to wisdom, a sense of weaving together many (sometimes disparate) threads, into a new coherent whole. Hall (2010) highlights the paradoxical dimension of wisdom, and observes: "It is rooted in character, personal history, and the experience of human nature, yet it is bigger than any one individual. It exists as both edifice and fog, is both immortal yet fleeting…" (p. 23). As discussed elsewhere (Tisdell, 2011), Aristotle made a distinction of three types of wisdom: *Sophia* as transcendent wisdom associated with spirituality; *phronesis* associated with practical wisdom; and *episteme* as theoretical or scientific wisdom. These distinctions are those often made in academic settings, though in all likelihood Indigenous cultural perspectives on wisdom would probably focus more on the holistic nature of wisdom as knowledge as opposed to separating it into parts (Berkes & Berkes, 2009). Here we psychological, Indigenous, and religious/spiritual approaches to wisdom.

Wisdom in the psychological research is conceptualized as either implicit (i.e. subjective) or explicit (grounded in theoretical conceptions of wisdom that are operationalized and tested). A major line of this research uses Robert Sternberg's (1998, 2005) definition of wisdom as a form of practical intelligence that balances individual, social interests and environmental contexts towards the goal of achieving the common good. Another body of psychological research focuses on wisdom as an expert knowledge system concerning the fundamental pragmatics of life (Baltes & Staudinger, 2000). Since the new millennium, there has been increasing general discussion about wisdom in edited collections, coming primarily from a psychological perspective (with consideration for education) drawing on cognitive and developmental perspectives. For example, Sternberg and Jordon's (2005) recent edited collection focuses on discussions of wisdom *in general* in regard to: cross cultural theories of wisdom; its development across the lifespan and in relation to personality development; its presence in workplaces in society. After an introduction on the history of wisdom, Ferrari and Potworowski's (2008) anthology focuses more specifically on cross-cultural perspectives on *teaching* for or *fostering* wisdom: as expertise; as personal transformation; or as learning from wise people. In these discussions wisdom is the main subject and it is explored and defined from multiple theoretical perspectives, including in relation to intelligence in cognitive psychology, and to the ageing process (Sternberg. 2005).

In the second approach, wisdom consists of Indigenous worldviews. The Alaska Native Yup'ik worldview of *yuuyaraq* is described by Yup'ik elders Oscar Kawagley (2006) and Harold Napoleon (1996) as a complex way of life with specific cultural mandates that dictate correct behavior between human beings, and correct ways of thinking and speaking about all living things. Cooperation and sharing are central, and respectful attitudes, speech, and behavior help to ensure harmony and balance within and between the human, natural, and spiritual realms. The exceptional awareness of one's surroundings that is inherent in this worldview has enabled Native people to survive in and adapt to extremely harsh and continually changing environmental conditions.

The third approach examines the transcendent and spiritual aspects of wisdom and how *religion* is conceptualized as one of humankind's attempts to institutionalize wisdom for the benefit of a culture. Many authors discuss this obvious connection of wisdom to spirituality/religion in recent adult development anthologies. For example, Young-Eisendrath and Miller's (2000) collection focuses on spiritual maturity and wisdom, while Miller and Cook-Greuter's (2000) anthology focuses on creativity, spirituality and transcendence as fostering wisdom and maturity. Mijares (2003) and her associates consider how religious and spiritual teachers and counselors can help their students or clients draw on the wisdom of the world's religious traditions over time to promote psychological, spiritual, and even physical healing in moving toward wholeness. Sussman and Kossak (2011) provide a lovely discussion of how to tap into wisdom through music, movement and meditation, recognizing that a full understanding of wisdom is beyond language. Hence, academic discussions of wisdom have their limitations.

A Longitudinal Qualitative Research Study:

Spiritual Development and Wisdom

The overall discussion of wisdom sets the context for considering the findings of a qualitative longitudinal study of the spiritual development of a multicultural group of 31 adult educators (14 white; 17 people of color) over a 10 year period particularly that pertain to wisdom. These educator participated in a 1.5 -3 hour taped interview in the original study of the role of spirituality in their overall development and in their teaching. The interviews were conducted by asking participants to share three significant memories of spiritual experiences. Frederick Buechner in discussing memory notes significant memory is more than simply looking back on a past event, that significant memory is "a looking out into another kind of time altogether where everything that ever was continues not just to be, but to grow and change with the life that is in it still" (as cited in Wuthnow, 1999, p. 151). I was looking for participants to share the memories that have life in them still.

The findings of that original study published elsewhere (Tisdell, 2003), focus on the role of spirituality in: (1) dealing with internalized oppression and re-claiming cultural identity; (2) mediating among multiple identities (race, gender, class, sexuality); (3) crossing culture to facilitate spiritual and overall development of a more authentic identity; and (4) unconscious knowledge-construction processes that are connected to image, symbol, ritual, and metaphor that are often cultural.

The follow-up study 10 years later explored how their spirituality has developed over time, and their perceptions of wisdom. Participants were provided their transcript from 10 years earlier, and re-interviewed in regard to their spiritual development and conception of wisdom. The general findings of this follow up study highlight: a) a more integrated sense of spirituality; b) a deepened sense of meaning-making from dealing with mortality and death; and c) an expanded sense of cultural consciousness. In all of these data collection processes I heard many stories of transformative learning.

Many of the participants did discuss wisdom and what it means to them as they age, partly because I asked specifically about it. They reported the specific ways they have grown in their spirituality in finding a rhythmic balance between inner reflection and outer action as a key component of ageing well. Like Socrates, they appear to also have a sense of humility in that while they see themselves as having grown and developed and see their growth as intersecting with their spirituality. However, while they did give some interesting thoughts on wisdom, they were hesitant to see themselves as wise or own the label "wisdom" in regards to themselves, though most of them saw themselves as wiser than they once were. The findings in regard to wisdom indicate wisdom involves: a) encompassing the whole; b)listening to and acting on "the inner voice"; c) realizing that "love is a central factor." But in the telling of the stories where these components came to light, they shared many transformative moments, that can't be captured adequately in a thematic analysis.

Encompassing the Whole

While these participants never described themselves as wise, they did discuss having a more expanded view of the world that was manifested in a variety of ways. They had all experienced death of loved ones in those ten years and some had dealt with serious health issues that threatened their own mortality. Julia for example who had experienced breast cancer, discussed having a much more expanded sense of her cultural identity:

In terms of my culture, I find, well, I have many cultures…So, in terms of my culture, my culture has embraced many different ways of being, or different cultures, and being Latino or being a person of color is just some of being a woman. There are just some aspects of it. It's all part of who I am and, in that way, it feeds into my spirituality.

She has also now joined another cultural group that is also informing her identity: the culture of survivors of breast cancer, which also relates to her spirituality.

Shirley's story serves as another example. Shirley described midwifing a couple of people through their dying process, and being present as a doula at the birth of a few children, that gave her a much more expanded sense of the meaning of life and death that she saw as spiritual experiences. "Lots of people are terrified of these things and are afraid of things like ghosts, and blood, and the whole issues of death, that often we can't be open to them [spiritual experiences]."

She also discussed the significance of some of her travels of the past 10 years, particularly those that connected her with the more Indigenous spirituality of communities related to the African diaspora as part of her cultural heritage. Her experience in Bahia, Brazil with women in the Candomble tradition was particularly

important. She said that some of these women reminded her of her grandmother and the women that raised her. While she embraces her African American cultural heritage, she also emphasized that her spirituality, culture, and identity is much bigger than can be "boxed", and noted "I came to black consciousness in my 20s because of what was going on, but my sense of spirituality is bigger than that and is extremely vast. This vastness of the divine is huge." This sense of the whole and the "vastness" appears to be related to this notion of wisdom.

Listening to the "inner voice"

Many of the participants indicated that wisdom was the result not only of life experience, but also of listening with a more integrated sense of self and one's whole being. In general they saw themselves as better at being able to access one's internal sense of wisdom, by meditating, journaling, or cultivating some sense of spirit. Maureen for example, now 63 talked about that when she access this it sort of surprises her. "I never know quite of what to make of all this but nonetheless there it is." She explains: "I do have a kind of channeling process that happens to me in my journal writing when I contemplate something that is particularly troubling me; I will sometimes get a kind of a different inner voice that is very strong and it comes through with a lot of wisdom." The voice will say: 'no that is not what is happening; this is what is happening and this is what you need to do next.' Which in Siddha Yoga [her tradition] we would call that the 'inner guru'." Others described a meditation process that would aid them in their decisions that would be seen as more wise.

"Love is a Central Factor"

Many of these women also talked about the importance of love and the recognition of the interconnectedness of everything as being part of wisdom. Anna, now 62, talked about the interconnection of love, spirituality, and wisdom:

> Wisdom is a spiritual knowing. My spirituality is based on the notion that there are no separations in the universe. We are all interconnected across time and space and whatever other dimensions and matter that exists, existed. I am because we are, because everything is everything. Love is a central factor. I love my sons enough to let them find their path with me as a supporting person because I know that they have that moral center and the trials they suffer will strengthen them in the long run. In some ways it's a gift to them to let them learn so they can add to the family [social] narrative. It is empowering to know that you are a part of the human journey, can shape it, add to it. Besides, I know I cannot control the world anyway, I am but a speck of the cosmos on a wonderful adventure for this material pulse of time, who am I to deny them the thrill of their pulse. It is so fleeting, this moment, held together and passed by the dreams and wonder of those before us. I am at peace with that.

She seemed to indicate that wisdom is also contextual; one is not "wise" in all aspects of life. She ended by saying in a somewhat humorous way: "On another note, wisdom is not all pervasive. There are some things I am not wise about. Never been really wise about men! Still something I have to learn!" Indeed, we all have things to learn.

Conclusions and Implications for Practice

What does this mean for working with adult learners and clients in a culturally responsive way that facilitates transformative learning and greater access to wisdom? These components about wisdom as holism, as listening to an inner voice (for the good of the larger world), and as love is a central factor imply particular suggestions for practice. First, as educators and counselors, we need to help learners tap into those kinds of experiences that will facilitate the development of wisdom. Second, while it is clear that people do make sense of their lives to some degree through critical reflection on experience, rational thought will not by itself lead one to the holism of wisdom. Third, exercises that aid learners in making meaning through engagement with symbol, metaphor, and story can help them tap into their own cultural imagination to make further meaning of their own memories that "have life in them still" that can potentially become a source of wisdom. Finally, looking at stories of wisdom across cultures, may not only facilitate cross cultural understanding, doing so may help learners tap into the "vastness" and holism that is part of wisdom itself. Such learning may indeed be transformative.

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Learning Along the Road of Motherhood: Exploring the Potential of Transformative Learning in Doctoral Student Mothers

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Abstract

Increases in women balancing multiple roles had drawn attention to research that examined the interface between doctoral studies, motherhood and work from the perspective of doctoral mothers. Due to the enormity of change experienced by these women, shifts in their meaning perspectives that accompanied motherhood was better informed by transformative learning theory (Taylor, 2000). Twenty mothers participated in this qualitative study, which examined the transformative effect of motherhood on women engaged in doctoral studies. Comparing participant's experiences with Mezirow's (2000) 10-step process, findings revealed that participants' experienced incremental shifts in thinking propelled by the process of critical reflection and rational discourse.

Background

Significant increases in the number of women who combine motherhood and doctoral studies have drawn attention to a need for research that examine their experience navigating their roles as an academic, mother and professional. Literature regarding women in doctoral programs have mainly focused on the challenges they face in trying to fit into the rigid mold of academia and less on their experiences in doctoral programs (Richard, 2011). In general, women have higher estimated attrition rates from graduate school than men across all fields of study (Herzig, 2004). Studies have examined factors that impact time between entry into graduate study and completion of the doctoral degree (e.g. Nerad, 1991). Findings from such studies suggested that having dependents lengthens the time for completion of the doctorate for women than men. However, we still lack understanding on how doctoral mothers make meaning of their roles since becoming a mother is a ongoing process of understanding and navigating changes in one's identity, self-concept, emotional well-being and level of responsibility (Akerjordet & Severinsson, 2010). The purpose of this paper is to engage participants in a reflective dialogue about the transformative learning experiences of doctoral mothers. This research contributes to current understanding of transformative potential of motherhood since the enormity of change triggers significant learning and leads to major changes in one's identity and life. It is therefore critical to acknowledge the learning and transformative effect that occur during the experience of motherhood and support women in the process of re-identifying themselves in their journey through motherhood as they navigate multiple life roles.

Problem

While transition to motherhood is a major developmental life event marked by numerous physical, social, and psychological changes (Mercer, 1995), the voices and maternal learning experiences of doctoral mothers are rarely explored in the adult learning literature. The exploration of maternal learning is often subsumed within the larger discussion about maternal competence and development of maternal identity without consideration of the influences of one's life experiences on one's learning outcomes (Fowler & Lee, 2004). Since women are situated between two powerful domains- the private sphere attributed to the home and public sphere attributed to the workplace and academia (Hays, 1996), reflecting on this unique intersectionality opens up the possibility of seeing and understanding the dynamic interplay of spaces women with multiple roles occupy.

Theoretical Framework

An issue that is critical to this research that is rarely examined in the adult learning literature is the significance of how women learn and make meaning as they navigate multiple life roles particularly in light of motherhood. Mothering as an adult learning experience is discussed in the adult development literature, whereby motherhood represents a trigger event for transformational learning (Abram, 2008). Transformative learning not only seeks to understand how an individual's meaning structures become transformed, but also explores how one's "frame of reference in concert with reflection on experience that

is addressed by the theory of perspective transformation—a paradigmatic shift" is modified in the process (Taylor, 1998, p.5). These shifts are usually triggered by a disorienting dilemma, which create dissonance when an individual is presented with something that is new, different, ambiguous, "unfamiliar and incongruent with their present frame of reference" (Cunningham & Grossman, 2009, p. 1). Needless to say, these experiences are often stressful, painful, and to some extent even debilitating forcing one to "question the very core of [one's] existence" (Taylor, 2008, p.6). Transformation ultimately occurs as the individual critically examines her situation and becomes open to alternatives, and changes in thinking and/or behavior begin to occur (Mezirow, 2000).

Methodology

Twenty doctoral student mothers from five institutions were selected through purposeful sampling. Using qualitative case study approach, this research explored the learning that occurred for women navigating academic, motherhood and professional roles. While the research design was not intended to make statistical generalizations and the experiences of the women in this study did not represent all doctoral student mothers, it could serve as an insight into the experiences of women with multiple roles. The aim was to see how a small sample of participants made meaning of their experience balancing their roles as students, mothers and professionals. In order to explore the research questions, participants were selected through purposeful sampling. The participants were selected based on the following criteria:

- Completion of at least one year in the academic program of any discipline
- Has a child/ren with ages ranging from age 0-13 and has been the primary caregiver of the child/ren since birth
- Currently engaged in full or part-time employment

Utilizing demographic surveys, critical incidents, interviews and focus group discussion, the responses obtained were analyzed for emergent themes and patterns guided by the seven phases described by Marshall and Rossman (2006) which included (a) organizing the data; (b) immersion in the data; (c) generating categories and themes; (d) coding the data; (e) offering interpretations through analytic memos; (f) searching for alternative understandings; and (g) writing the report of other format for presenting the study (p. 156). After individual cases were analyzed, a cross-case analysis was performed by "aggregating findings across a series of individual studies" in order to identify patterns, connections and relationships within and between categories (Yin, 2009, p. 156).

Findings and Discussion

For majority of women, the change accompanied by one's entrance to motherhood was greater than transition theory suggested (Miller & Sollie 1980). As Rogan et al. (1997) observed, women "undergo a profound reconstruction of self" when they enter motherhood (p. 884). The enormity of change experienced by participants supported Rubin's (1984) contention that "from the onset of labor to the destination, child bearing requires an exchange of a known self in a known world to an unknown self in an unknown world" (p. 52). To investigate whether these women's conceptualization of motherhood had changed, their experience was compared with the 10-step process of perspective transformation set forth by Mezirow (2000). While perspective transformation occurred for eleven out of twenty participants (55%), the process surrounding this change was not linear nor did they appear for all participants. Meanwhile, nine out of twenty participants (45%) demonstrated no perspective transformation. A cross-case analysis showed that transformative learning was experienced by participants regardless of age, ethnicity, type of institution (private vs. public), specialization or academic discipline, length of time in program, occupation, work status, and number of children.

Triggers of Transformative Learning

There were two types of transformations in meaning perspective according to Mezirow (2000): (1) epochal and (2) incremental. An epochal transformation was said to take place when an individual experienced abrupt shifts in their meaning making. Incremental transformation, on the other hand, was the result of small shifts in meaning schema that over time, led to an individual's change in perspective. Consistent with previous research, participants in this study experienced incremental shifts as they made sense of their mothering experiences, which allowed them

to redefine their own conceptualization of motherhood in light of their multiple roles. This study revealed how these women underwent changes in their perspectives "within the context of prevailing (and often localized) discourses of ideal motherhood, to redefine their expectations of motherhood and to emerge in various ways, as becoming relative experts or 'good enough' mothers" (Banister, Hogg, Dixon, 2010, p. 518). While experiences were transformative for some, but not for others, all women shared a common process in their learning to balance their roles. Many articulated changes in their personal, academic and professional lives prior to and after becoming a mother. These changes were either prompted by (1) a single, abrupt and life-changing event or (2) a series of inter-related events that precipitated change in an individual.

Consistent with Taylor's (2000) observation, a very small number of women experienced an epochal type of transformation marked by a disorienting dilemma. The majority experienced what Clark (1991) called "integrating circumstances", which were "indefinite periods in which the persons consciously or unconsciously search for something which is missing in their life; when they find this missing piece, the transformation process is catalyzed" (pp. 117-118). Disorienting dilemma for three women in this study came in the form of loss of a family member, health scare, job transition and a serious life-changing accident. Integrating circumstances as reported by eight women occurred at a more gradual pace, as one built on previous life experiences and searched for some missing dimension in her life (Clark, 1991) such as questioning one's own privileged upbringing; decision to accept a demotion; having children while engaged in a fulltime doctoral program; giving birth overseas; having health complications with pregnancy; weighing career options; having a severe emotional breakdown, and learning of a child's diagnosis as having developmental and speech delays.

Key Elements to Perspective Transformation

Findings in this study corroborated with Mezirow's (2000) claim that critical reflection and rational discourse were key to transformative learning. In fact, all participants (100%) indicated critical reflection or critical assessment of their own and other's assumptions and 90% engaged in some form of rational discourse with significant others and other women.

Critical Reflection. Mezirow (2000) described critical reflection as "the most significant learning experiences in adulthood [which] involve[s]…reassessing the way we have posed problems and reassessing our own orientation to perceiving, knowing, believing, feeling and acting" (p. 13). For Brookfield (1991), critical reflection is not merely an intensive kind of reflective effort but a thought process that involves "some sort of power analysis of the situation or context in which the learning is happening" (p. 126). The ability to think through one's embeddedness in hegemonic assumptions or to reflect on underlying premises, beliefs and assumptions is what Mezirow (2000) termed premise reflection. For example, the experience of motherhood prompted the women in this study to reflect on long-held assumptions about what it meant to be a successful career woman. Still others reflected on deeply held assumptions about cultural differences.

Rational Discourse. According to Mezirow (2000), "discourse…centrally involves finding agreement, welcoming difference, "trying on" other points of view, identifying the common in the contradictory" (pp. 12-13). Consistent with Mezirow's assertion, participants exhibited objective elements that were hallmark of an effective rational discourse. For example, many learned to "negotiat[e] their way between culturally pervasive and life-framing discourses [which prompted the need] to reconcile their personal experiences and values with broader discourses" (Banister, Hogg, Dixon, 2010, p. 518). Aside from the cognitive dimension involved in a rational discourse, participants also described subjective elements like trust and friendship in the process of balancing their roles. This form of relational discourse, according to Belenky et al. (1986), was characterized by two people "really talking". In other words, participants engaged in the dialogue actively listen, withhold judgment and extend empathy to one another. This study lent direct support to the significance of the role of relationship in transformative learning. Relational knowing, for the women in this study, transpired through the formation of emotional connection and trustful relationship during a discourse with one's spouse or other doctoral women (Taylor, 2000). In essence, participants were drawn into relationships with people who shared their journey of balancing multiple roles. It was "through building trusting relationships that [they] develop[ed] the necessary openness and confidence to deal with learning on an affective level, which [was] essential for managing the threating and emotionally charged experience of transformation" (Taylor, 2000, p. 308). Self-examination of feelings and emotions and critical reflection of assumptions led the women to recognize that others have gone though a similar experience. This realization was the

seed that bore fruit to the discourse phase, which was a safe venue to dialogue and explore personally and socially held beliefs and assumptions (Mezirow, 2000). Participants in this study noted their spouses and other doctoral student mothers as key individuals who shared their experience as well as engaged them in reflective discourse.

The 10 Step Transformation Process

Since its inception, the 10 steps had been a popular subject of research, however, Taylor (2000) observed that only a few studies provided conclusive data confirming each step of transformative learning. In an attempt to confirm each step, the researcher converged all evidence through the interviews and critical incidents noting patterns that resemble the steps suggested by Mezirow (2000). The findings indicated that 55% of participants experienced non-linear perspective transformation, while 45% did not experience any transformation. All eleven participants who experienced perspective transformation reported incidents of self-examination (Step 2), critical assessment (Step 3), recognition that the experience is shared with others or solidarity with others (Step 4) and reintegration (Step 10). Of these, only three women reported experiencing some form of disorienting dilemma. An important hallmark of the women who experienced perspective transformation was an increased sense of self-confidence and flexibility to tolerate the ever-changing nature of their roles.

Three women reported experiencing disorienting dilemma (Step 1) in the process of balancing multiple roles. Critical reflection was manifested by all participants through critical assessment of their own and other's assumptions (Step 3) while 90% of the women expressed solidarity with their spouses and other doctoral women (Step 4) through rational discourse. Self-examination (Step 2) was found to be strongly connected to Steps 3 and 4 as Lytle (1989) observed in her study of twenty female RNs returning to school. Similarly, self-examination was manifested through statements about psychological and emotional reactions towards traditional role and gender expectations. Exploration of options for new roles, relationships and actions (Step 5) was manifested through statements pertaining to adjustments in future career and clarification of future goals. A striking finding in this step was while participants were able to identify career goals and was making strides towards achieving such goals, there was a sense of hesitation, a certain cautiousness in the forging ahead with their future plans. This hesitancy was clearly influenced by their motherhood role. Planning a course of action (Step 6) was exhibited through responses about crafting time to work on the dissertation, planning future career moves and timing the birth of the child "without being forced to take time off from work or jeopardize their [career or research] goals" (Armenti, 2003, p. 217). Acquiring knowledge and skills for implementing one's plans (Step 7) involved the use of technology for some, while others spoke of practical tips and internal organization or "creating spaces" in order to fulfill their multiple roles. Provisional trying of new roles (Step 8) was revealed through evidence of willingness to pursue new opportunities and trying new roles and actions. Building competence and self-confidence (Step 9) was demonstrated through reflections about renewed energy, self-affirmation, milestones and resiliency. Reintegration (Step 10) was manifested through statements that reflected "greater autonomy, enhanced personal control" and a sense of joy and acceptance for one's decisions, actions and accomplishments (Lytle, 1989, p. 123).

Meanwhile, nine participants who did not experience perspective transformation, experienced some but not all of steps 2 to 9. These findings lent direct support to Lytle's (1989) findings that individuals who achieved perspective transformation experienced steps 2, 3, 4 and 10. A point of divergence between the current study and Lytle's (1989) was that the seven RN's who experienced transformation in her study went through all ten steps while this study showed that perspective transformation could still be attained without undergoing all steps. Dewane (1993) also shared this observation in her research on self-help groups where she found cognitive and behavioral changes among participants and confirmed that "the transformative process was not necessarily sequential nor was successful completion of one stage contingent upon completion of previous stages" (p. 167). In fact, similar to other research Taylor (2000) had investigated, participants in this study experienced the process "to be more recursive, evolving and spiraling in nature" (p. 290) and consistent with Taylor's findings, participants in this study first acknowledged positive and negative emotions and feelings of uncertainty toward themselves, their womanhood and their roles, (e.g. questioning oneself, gendered expectations wielded by their cultural norms, and conflicting emotions), before entering into the critical reflection phase.

Conclusion

The challenges of balancing motherhood with other life roles required significant shifts in thinking and "integration of different possible mothering selves which are informed by discourses that frame understandings of what it means to be a mother and reflect the conflicts, contradictions and ambivalence encountered" (Banister, Hogg

& Dixon, 2010, p. 518). For the women in the study who experienced a shift in perspective, critical reflection and rational discourse allowed for a new way to make meaning of their experience balancing multiple roles. The potential for transformative learning in the process of motherhood was an important finding, which had tremendous implications for academic retention policies and teaching pedagogies in higher education aiming to support and facilitate transformative learning among non-traditional students. Future studies may investigate the experiences of doctoral mothers with older children and how they balance their roles. Additionally, future research may consider the inclusion of deviancy discourse which includes single mothers, lesbian mothers and older mothers to look at the similarities and/or differences in their experiences that occur as a result of not 'fitting the mold' of higher education and the dominant ideology of motherhood.

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Promoting Creativity in Adult Education: Transformative Learning in Action

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Abstract

A review of the literature of adult education revealed that creativity is seldom addressed in the research or in discussion of practice outside of the domain of Transformative Learning Theory. The purpose of this study is to identify current trends of creativity in adult education, to examine the connection between creativity and creative thinking, and to provide some suggestions for practitioners to nourish creative thinking. The authors make a plea for promoting creative thinking in the field of adult education, in hopes of energizing the creative process for adult learners to reimagine learning, ignite the imagination, and perhaps transform the world.

Keywords

creativity, creative thinking, adult education, adult learners

Introduction

Imagine that a 2012 college graduate is 25 years old. She may be working in the field for 40 years, what will the systems and work environments look like in 2052? How will he stay   competitive in an economic environment with limited resources? The main issue is: how can we prepare adult learners to practice in an unknown future environment? The key is to strengthen their capacity for creative thinking.

The purpose of this article is to identify current trends of creativity in adult education and to draw suggestions for practitioners to nourish creative thinking in their context. We will discuss the growing interest in creative expression and the research gap in adult education literature. We will explore the role of creative expression in transformative learning and the implications for applying lessons learned in adult education classrooms. By doing so, it is our hope to make a plea for promoting creative thinking in adult education, thereby energizing the creativity for adult learners to reimagine learning for the transforming world of the future.

Creativity Research in Education

At the heart of the research of creativity in education, three close strands are commonly presented: teaching creatively, teaching for creativity, and creative learning (Jeffrey & Craft, 2004; Lin, 2011; Simmons & Thompson, 2008). The National Advisory Committee on Creative and Cultural Education (NACCCE, 1999) differentiated two concepts in creative teaching: teaching creatively and teaching for creativity, the former is defined as "teachers using imaginative approaches to make learning more interesting, exciting, and effective" (p. 102) and the latter is focused on the development of creative thinking and behavior of students. In sum, the former is more centered on the lens of teachers; the latter is more focused on the perspectives of learners who implement creative learning. Those two facets of creativity are not dichotomized rather they are highly correlated (Jeffrey & Craft, 2004; NACCCE, 1999). Further, Jeffrey and Craft (2004) and Lin (2011) proposed creative learning is also an important element of creative pedagogy. Creativity is *per se* a mode of learning and involves imaginative activity, thoughtful playfulness, autonomy, and flexibility (NACCCE, 1999). The interplay between creative teaching and creative learning are necessary to fulfill the whole process of the learning experience (Lin, 2011).

A demand in fostering creativity has become a universalized discourse across different nations (Craft, Gardner, & Claxton, 2008; Newton & Newton, 2009). The function of education serves as the building block of human capital through equipping students with knowledge and creative capacities (Lin, 2011; NACCCE, 1999; Shaheen, 2010). Policy making and curriculum reform were carried out in order to fit this need (Feldman & Benjamin, 2006; Shaheen, 2010). For instance, O'Donnell and Micklethwaite (1999) reviewed curriculum documents from 16 countries and found that creativity was viewed as a key skill and embedded in various educational levels, from primary to higher education. Based on those educational policy documents from around the world, it suggests that the action of promoting creativity in education has gradually been taken (Shaheen, 2010).

In fact, a number of creativity training programs and materials were introduced in the classroom (Benedek, Fink, & Neubauer, 2006). Lau, Ng, and Lee (2009) categorized five groups among those creativity tools: (1)

identifying and mapping attributes (e.g., Mind Mapping), (2) making possibilities (e.g., Brainstorming), (3) changing and shifting perspectives (e.g., Six Thinking Hats), (4) making associations and analogical thinking (e.g., Lateral Thinking), and (5) probing emotion and the subconscious (e.g., Lucid Dream Technique) (p. 73). Based on review of 133 empirical studies with children, Torrance (1972) found that the most effective approach for promoting creativity in the classroom is the use of various modifications of the Osborn-Parnes Creative Problem Solving training program.

In 1953, Osborn first introduced the Creative Problem Solving (CPS) in order to facilitate creative thinking. Based on his model, the most well-known tool is brainstorming. The main theme Osborn wanted to portray is that creative potential is normally distributed; namely, individuals could develop their creativity through deliberately learning creative thinking skills (Puccio & Keller-Mathers, 2007). Since then CPS has become a popular training program used in classrooms. Normally, five steps guide this process: fact finding, problem finding, idea finding, solution finding, and accepting finding (Davis, 2004, 2006). Treffinger (1995) refined the steps further and clustered them into three components: understanding the problem, generating ideas, and planning for action. More importantly, he identified the CPS framework as not a linear model rather a flexible process that fits an individual's learning style and personality.

Arts and Creative Expression in Adult Education

With regard to adult education practice, arts-based learning approaches have been widely used and well documented in adult education literature (Clover, 2010; Hoggan, Simpson, & Stuckey, 2009; Lawrence, 2005). For those studies, art was viewed as a means for creative expression not an end for promoting creative thinking. From a practitioner's perspective, arts and concepts related to creativity could facilitate learning on multiple levels. Rather than only focusing on formative and cognitive learning, the arts could lead to other pathways of learning through the use of intuition, imagination, and the unconsciousness.

A number of authors have drawn attention to the value of creative activities in adults. Stuckey (2009), for example, found arts could be a useful tool to capture the meaning-making process of diabetes patients who verbalize their emotions and communicate with others. This creation of meaning helps access a greater depth of knowing self. Stuckey (2009) concluded that creative arts-based approach should be embedded in adult education. In addition, after reviewing several projects in Canada, Clover (2006) maintained arts-based learning could serve as a useful vehicle for critical dialogue among diverse groups. In fact, this critical reflection through arts-based learning provides alternative approaches to "open up interracial, cross-cultural, and antiracist dialogue and learning" (p. 57). Other Canadian researchers also confirmed the utility of arts-based learning in adults group. For instance, Grace and Wells (2007) uncovered the power of arts as an intense medium for minorities to spread their voices about the environment they face.

Taylor (1959) has identified five different levels of thinking of creativity: expressive creativity, productive creativity, inventive creativity, innovative creativity, and emergent creativity. He argued that the layperson often perceives creativity in lens of the fifth level. Following this line, arts-based research only posits in the first level. In other words, even though creative arts-based expression has received more focus in adult literature, one important element is still missing – creative thinking. Consequently, it is argued that in order to strengthen the creativity capacity of adults, it is necessary to teach or at least encourage creative thinking in adult classrooms. The next section will examine this research gap.

The Missing Piece of Creativity in Adult Education Literature

Over the last 20 years, a great number of researchers and theorists have explored pedagogical approaches for promoting creativity in education (Craft, Gardner, & Claxton, 2008; Sternberg, 2003; Tan, 2007; Treffinger, 2004). Nevertheless, a scarce number of those studies are located in adult education. We examined the major adult education journals (*Adult Education Quarterly*, *International Journal of Lifelong Education, New Directions in Adult and Continuing Education, Studies in the Education of Adults*) and used the keywords (*creativity*, *creative learning*, and *creative expression) from* 1992 *to* 2012. The search only yielded 18 articles addressing subjects related to creativity and adult education. As Table 1 showed, within those articles six topics were found.

Table 1

Six Topics Related to Creativity in Adult Literature

Topic	Citation
Creative expression for health	Bennetts, 2004; Cueva, Kuhnley, & Cueva, 2012; Noble, 2005; Stuckey, 2009
Communication and creativity	Clover, 2006; Grace & Wells, 2007
Creative learning	Clark, 2001
Creativity in lifelong learning	Dovey & Muller, 2011; Su, 2009
Creative expression in transformative learning	Davis-Manigaulte, Yorks, & Kasl, 2006; James, 2002; Luckie, 2005
Creativity in adult education	Beckett, 2001; Clover, 2003; Edelson, 1999; Edelson & Malone, 1999; Haanstra, 1999; Walshok, 1999

Another telling indicator is the lack of mention of creativity in the *Handbook of Adult Education*, published every ten years to "provide an overview of the kinds of organizations, methods, and research that are important to the field" (Kasworm, Rose, & Ross-Gordon, p. ix). In the Index of the latest *Handbook of Adult and Continuing Education* (Kasworm, Rose, & Ross-Gordon, 2010), creativity is cross referenced with artistic expression which has only a one page listing. The 1989 edition of the *Handbook* (Merriam & Cunningham) and the 2000 edition (Wilson and Hayes) have no listings for creativity in the index.

Cranton, in the Foreword of *Creative Expression in Transformative Learning*, commented on the increase in the number of presentations incorporating artistic, creative and imaginative themes at the International Transformative Learning conferences. "In spite of the popularity of conference sessions based on creative expression, surprisingly little has been written about how educators of adults can incorporate this approach in their practice" (Hoggan, Simpson, & Stuckey, p. ix).

Hoggan, Simpson, and Stuckey (2009) identified five types of learning resulting from the use of creative expression in adult education contexts: imagining new possibilities, deep learning of course content, self-awareness, purposeful change, and social change. We believe that the lessons learned from creative expression in the context of transformative learning warrant reflection on what is known about creative thinking and how it can be integrated at a deeper level in adult education classrooms. Critical reflection and deconstruction of thinking to identify and challenge assumptions has played an integral role in transformative learning, we believe a shift to purposefully integrate creative thinking is needed. In addition, we believe there is a need for more quantitative research and studies involving mixed methods to deepen our understanding of creative thinking.

The Importance of Creative Thinking

Creative thinking and other terms, such as "divergent thinking" "productive thinking" or "imagination," are used interchangeably in the creativity literature (Torrance, 1995). Guilford (1956, 1959) initially proposed using a psychometric approach for the measurement of creativity with the focus on divergent thinking ability. In line with this notion, Torrance (1974) developed the Torrance Tests of Creative Thinking (TTCT), which is the most frequently used measure of creativity in empirical research and the educational field from preschoolers through adults (Torrance, 1995; Torrance & Goff, 1989). TTCT measures four dimensions of creative thinking: fluency (the number of ideas), flexibility (the number of ideas in different categories), originality (the number of infrequent ideas), and elaboration (the number of detailed ideas) (Davis, 2006; Kim, 2007).

Torrance (1977) pointed out that at the primary level, the development of creative thinking is through the conjunction of learned knowledge and the experienced context. Fasko (2006) claimed the function of creative

thinking is to synthesize the information and then generate novel solutions. Weisberg (2006) stated that creative thinking is a "process underlying production of creative products" (p. 7). Ruscio and Amabile (1999) found the definitions of creativity make clear distinction between creative thinking and problem solving in the literature. Drawing from the application of Creative Problem Solving (CPS) model, Treffinger and associates (Treffinger, 1995, 2009; Treffinger & Isaksen, 2005) argued that creative thinking includes two stages; first is the divergent phase of producing ideas, and then critical convergent stage for evaluation of possible solutions.

Torrance (1995) has identified the merits of creative thinking in mental health, educational achievement, vocational success, and other areas in life. In the education field, Sternberg (2003) underscored that teaching creative thinking could benefit both students' academic and school performance. More specifically, Sternberg (2003, 2005) provided some suggestions toward creative thinking: redefine problems, analyze solutions, defy the crowd, take risks, open minds, tolerate uncertainty, and be patient. Davis (2004) finally concluded the best practice of teaching creativity is to "involve students in activities that intrinsically require creative thinking and problem solving" (p. 102). Given the literature review at this juncture, creative thinking could be defined as a process and an approach with the focus on generation of novel and useful ideas for problem-solving and exploring alternative learning from different perspectives.

Conclusion

Although some adult educators had made a plea for promoting creativity in adult education (e.g., Edelson, 1999; Edelson & Malone, 1999; Lones, 2000), momentum is lacking. More creative energy should be invested in adult classrooms. Torrance (2003) concluded there is a great demand for creativity, particularly for older adults, to find new solutions when confronting a host of problems including great changes in technology, globalization, the economy, and society. It is the responsibility of educators to foster that creativity. Therefore, Sternberg (2003) contended that educators should encourage"[students] to create, invent, discover, explore, imagine and support" (p. 333) in the process of increasing knowledge.

Creative thinking is a sine qua non for adult learners. Accordingly, it should be one of the most important components for adult education. The research gap has been identified in the current study. It is understandable it takes time to make a progress; however, this banner should not end as a lip service but rather should result in a formalized action plan. It is time to unleash the full creative potential of adult learners and adult educators.

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Learning for sustainability, the construction of new social imaginaries.

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Abstract

Based on the contention that our relationship with the world is in urgent need of a reconceptualization we think learning processes must help individuals and groups to envision new possibilities and different ways to organize society. In this paper we are proposing a model to develop understanding that leads us to engaging on how we can create new social imaginaries. Transformative learning processes can be a truly exciting experience where by individuals and groups find new sense of purpose, experience caring relationships and feel empowered to step out of old frameworks of thought. The model we designed brings together three theoretical bodies of thought: holistic learning, transformative learning and learning for sustainability. We conceive these three frameworks bonded by Bakhtinian dialogical discursive relationships where Vygotskian inter and intrapersonal dialogues become spaces for reflection and awareness about reality. Where and how we stand in the world must mean looking at the individual as part of collective groups that impact the world. The guiding spirit of co-operation can nurture these learning processes.

Keywords

Holistic learning, learning for sustainability, transformative learning. social imaginaries.

Introduction

Learning for sustainability involves the ability to create new social imaginaries (Taylor, 2004). Without transformative and emancipatory learning opportunities there cannot emerge new social imaginaries. Spaces for the emergence of new social imaginaries, involve challenging previous learning experiences. We envision this path as processes where continuous reflective and reflexive dialogues at interpersonal and intrapersonal levels lead individuals and groups to understand their learned capital and construct new meanings (Bakhtin, 1981; Vygotsky, 1986). A transformative learning process with a holistic approach enhances the capacity to envision new possibilities and different ways to organize society. This is intrinsically woven in how we perceive and bring together our emotions and understandings of ourselves and the world around us, and how we react or act on a daily bases.

Body of Thought

The model we have developed brings together three bodies of theory: holistic learning, transformative learning and learning for sustainability. The bonding ideas of this framework can be traced back to the Russian school of thought through Vygotsky and Bakhtin.

The Bonding Ideas

Vygotsky challenges the fragmented view of the individual separated from its cultural, social and environmental reality. He recognizes that interpersonal dialogues trigger an inner reflection. For individuals to learn, they need to construct meaning to what they experience interacting with the environment and the cultural values, traditions and social organization in which they are imbedded. In other words for Vygotsky (1986) learning involves mediated transactions with the world to develop our understanding of what it means to be part of it. We are calling up on the concept of artifact (Bakhurst, 1995). Our constant interaction with the physical world and its artifacts allows us to establish connections not only with people, but also with nature and objects that surround us. The connection between both enhances our capacity to recognize how we become a reflection of the reality in which we are immersed. A *pas a deux* takes place as a process in which we become aware of how we think and value ourselves in this world.

Bakhtin (1981) contributes to this discussion by pointing out the centripetal and centrifugal discursive forces in our daily performances. We adhere to the definition of Discourse from Gee (2005) who differentiates between language discourses and the Discourse of daily performance in all actions, including the human endeavor of making and giving sense to our existence. Centripetal forces are those, which establish monoglossic discourses within the person itself. It leads us to think that if we understand something in a certain way, everybody will do so too; dominant discourses tend to be monoglossic and act as impositions on human beings that try to regulate sense making and "correct" actions among groups of populations. A countervailing force to this phenomenon is the centrifugal forces, which at any moment tell us that there are multiple ways of

looking and standing in the world and therefore are heteroglossic. The confrontation of both forces creates a constant tension that dynamizes our existence. These forces establish a dialogue among themselves; this idea is linked to Vygotsky's inter and intra personal dialogues. When fear and comfort drive people to act, monoglossic discourses get installed. Societies tend to get impaired when these are feelings that are shared among the majority of its members, the reaction that is elicited often pushes people to hold on to the familiar values; mechanisms of exclusion and privilege tend to be legitimized and questioning the *status quo* is challenged. Intra-personal dialogues get blocked as well as the capacity to take in the heteroglossia of our world. Fear paralyzes human beings (Klein 2008) and interferes badly with learning processes (Rogers, 1969).

These theories of dialogue are explicitly and or implicitly present in the bodies of theory developed in holistic learning, transformative learning and learning for sustainability. The different schools of thought have emerged in different contexts, within a variety of traditions responding to questions that address the need of understanding ourselves. Ultimately, they seek to explain how individuals and groups learn and make sense of their world.

Holistic Learning
From the body of theory of holistic learning we take up the dimensions that are involved in all the dialogues described above. These are: identity, meaning and purpose in life through connections to the community, to the natural world and to spiritual values such as compassion and peace (Miller, 2010). An important element is the notion of a dynamic identity, in which every person is immersed in a process of coming to terms with his/her body, perceptions, emotions, traditions and values present in their socio-cultural and historic environments. Human life is a journey of continuous quests where identities are conformed, restrained and delimited in this dialogue with the world and the spiritual values held. Every person is embedded and afforded a voice within a discourse —in their own or in the discourses of others— (Shotter and Gergen, 1989). The core value for a humanistic approach to an educational process is to convey to every participant unconditional acceptance and validation, acknowledging his or her discourse.

Every moment in our life is a choice of how we spend our time, how we choose to feel, if we are willing to perceive our intuition which is related to our emotions, thoughts, breath, body (Kaufman, 1991). To become aware of our whole being is a matter of will and training. Once you learn to listen to your intuition and realize how the environment and the choices you make affect your being and the world this becomes a conscious process. You learn to see differently and can choose to act accordingly. This capacity to listen to your intuition involves becoming aware of your body (does it feel comfortable, does it ache, is it tense, is it at ease, how is your breath, your digestion, how does your skin feel) and to your train of thought, as well as to your emotions. Soon you will discover that body, emotions, mind and spirit are intrinsically woven together, they are not separate, they are one. When we start to notice these relations we become conscious of our various dialogues. We have to realize that with every action or reaction we are creating our world. This deep understanding of human nature brings us together with the oriental comprehension of life. Oriental traditions have developed the means to strengthen the will and the training to bring together body, emotions, mind and spiritual intuition (Feuerstein, 2003). This quest is at the core of holistic learning, and requires a disciplined practice to achieve that state of awareness.

Transformative Learning
Transformative learning historically has had different aims and focuses. One tradition involves educators concerned about persons who have fallen out of the job market, given their lack of skills and knowledge. The emancipatory processes are dealt with at individual level very much aiming at transcending personal limitations and frames of reference. This approach of transformative learning evolved from a cognitive perspective to a whole person perspective (Mezirow, 1999). In this body of theory one important triggering element for the process of learning is a disorienting dilemma that will help us revise paradigms of thought, actions and values. A dilemma in itself triggers dialogues and when it is disorienting it allows for a deeper reflection and awareness of these dialogues. It is a state in which multiple opportunities for change open up, helping a person or a group to move from inertia and break a static situation.

From the Latin American traditions of transformative learning we take up the dialogic proposal of Paulo Freire (2002, 2006) who envisaged learning processes as a collective endeavor, as a process of group learning and emancipation. For Freire making a critical reading of reality in a group setting is the starting point to any learning process. Such a reading to become critical involves a dialogue with centripetal and centrifugal discursive forces in it. Although the personal dimensions are acknowledged the group processes is the main focus. The first dimension within this tradition to work on is the process of group empowerment where the value of the cultural capital of each individual is relevant for the development of everybody. Every individual is an expert if he/she becomes aware of his/her own reality and a valuable contribution to the group and to the

collective learning process. In order to be able to critically read reality a dynamic of reflection- action- reflection has to be shared by the group. Freire emphasizes the need of getting involved in a process of transformation through concrete actions in order to learn and comprehend deeply the relationships that make up reality. The process involves becoming aware of the heteroglossic nature of societies. Together critical analysis may take place within the group opening paths for the development of transformative learning processes. Being part of a group means becoming empowered and mutual support helps people to step out of ways of doing things with which they no longer feel comfortable even if it is against mainstream. The sharing of experiences of people who struggle for the same kind of transformation encourages the group and every individual to develop a variety of strategies and to endure in difficult moments. However within a group people ought to feel at ease sharing positive and negative outcomes and feelings, as well as value judgments of what is going on. Building up trust in each other is an essential feature of collective transformative learning processes. Big changes that imply a paradigm shift are always emancipatory learning processes, because for them to occur previous frameworks have to be challenged.

Commitment to the group and a continuous revision of our ethical responsibility for the others are features that will enhance the learning processes. They are characterized by their heteroglossic nature. The inter- and intra personal dialogues, within the group and with the surrounding reality, together with shared actions are at the core of the transformative learning processes. Transformations of the individuals and of the group are triggered; both reinforce and empower each other. This is the reason for creating a climate of trust and confidence in groups that engage in collective learning and are interested in acquiring new perspectives.

Learning for Sustainability

A growing number of groups in all societies are recognizing that our current dominant cultures are endangering the survival of our planet (Diamond, 2005). Sustainability (WCED 1987) is evolving into an attractive alternative as a way to develop a countervailing force to those depredatory cultures. Since 1948 the International Union for Conservation of Nature (IUCN) addressed governments and societies to change their attitudes towards Nature. It took 25 years for governments to respond and make serious efforts to look at the impact of development projects on the environment. Working on environmental education —either from a feeling of love for nature or from the recognition that we need nature for our own survival—, has lead to a profound paradigm shift. Sustainability nowadays has evolved to a holistic approach that contemplates survival of our cultures and societies establishing equitable, respectful and loving relations among all beings and things of our planet, recognizing that we are all part of it.

Learning for sustainability has integrated holistic education and transformative learning approaches to engage with groups of stakeholders when projects for local and/or regional sustainable development require paradigm shifts for new ways of doing things. The active participation, shared decision making, critical dialogue and ethical compromise of Freire's approach to collective transformative learning has been widely taken up by environmental educators and by activists that promote sustainable development. Beliefs and values are very often at the centre of discussions and critical analysis, monoglossic and heteroglossic dialogues create interesting tensions and dynamize the possibilities for critical analysis and for organized action.

Learning for sustainability is evolving as a new challenge for all formal educational systems. It requires moving from rationalism and fragmented views of reality to transcend alienation and interrupt the inertia towards collective suicide. New approaches to science, problem based learning, project based learning and the need to challenge reality with a variety of disciplinarian approaches are slowly leading their way in to schools, colleges and universities.

Social Imaginaries

We live in times where the development of new social imaginaries is paramount. We need to take up the challenge to participate in what Harman (1998) has recognized as the Second Copernican Revolution, that is the world inside us. We have to recover our capacity to feel, perceive and take up contact with our spiritual nature in order to give cognition a real chance to comprehend in a different way our own existence in this universe. We are looking for ways to develop inspiration, trust and empowerment, a sense of purpose and the will to act. We have learned in yoga that mind and body have to be cleansed periodically in order to create space for new ideas. In all spiritual traditions the practice of reaching a state of real inner silence is basic to a true and real perception of the world, without our pre-conceived ideas and assumptions. The importance of the messages we bring as teachers and individuals should be recognized. It is paramount to the energy we create around us and for other people to act. If we bring only negativity we create despair, anger, frustration, numbness, lack of purpose, indifference, cynicism. Being able to see reality clearly and build on positive attitudes, on ancestral and new knowledge that leads to healing and inspires to change personally. The purpose is to create a sound environment around us; this will expand to everything and everybody we touch. These predispositions are

important to enhance creative new social imaginaries that help us transcend attitudes and a way of life that leads to collective suicide.

New social imaginaries are the outcome of transformative learning processes for sustainability with a holistic approach.

The following diagram can illustrate the above-described theoretical model:

Transformative Learning for Sustainability
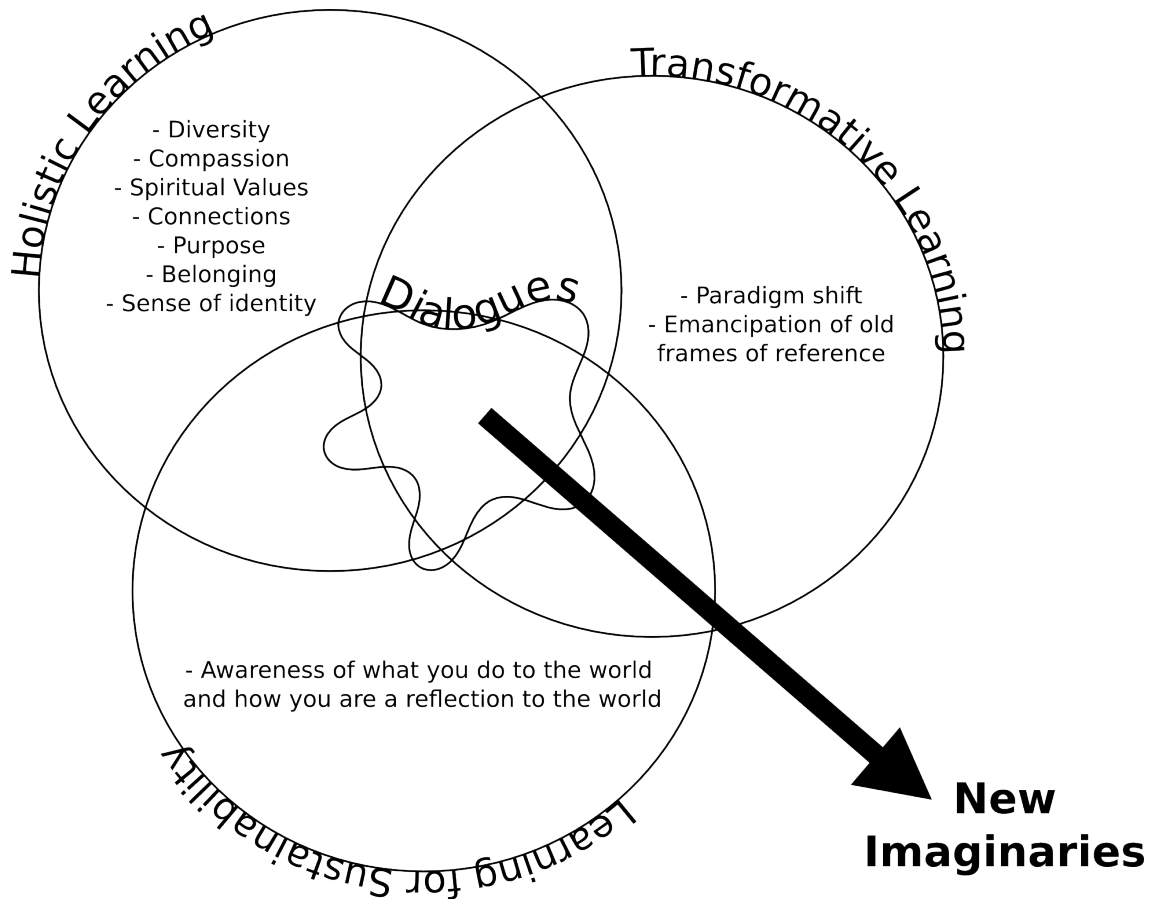
This model visualises learning as a powerful transformative process that creates new imaginaries to challenge the mainstream ideology that is depleting all our resources and destroying life of our planet. In order to transcend fear, comfort and rationalistic arguments that legitimizes our absurd way of life, a holistic approach to learning will help groups to acknowledge each other and to value and respect each person's own learning process, requiring of all individuals to me mindful and caring of everybody. Disorienting dilemmas will trigger intra and inter personal dialogues that will allow for a critical analysis of reality. Engaging in collective action for transformation towards sustainability will allow for an enriching and exciting learning process. A true spirit of co-operation, of sharing in trust and confidence will allow the emergence of new social imaginaries for sustainability. The heteroglossic nature of these processes will allow for rich and complex analyses and profound learning will be possible in this sense

New social imaginaries as collective and shared experiences are required to develop a sustainable and holistic approach to our reality. We conceive a sustainable approach as a dynamic process by which humanity reinvents its reality by increasing the individual and collective awareness of the impact of our thoughts, emotions, perceptions and value systems on ourselves and the whole environment with which we interact. To enhance transformative learning and free us from our old frames of reference that fragment our reality, it is necessary to engage the whole person in intrapersonal and interpersonal dialogues to increase awareness of our

position in the world. A deep understanding of the holistic nature of our world will lead to sustainable social imaginaries

Procedures

The contribution is organized as a workshop with a minimum of three and a maximum of 15 participants for a period of 60 minutes. The working place must be sufficient for every participant to be able to lie down, chairs that can be accommodated in a circle, individual papers and crayons, sheets of wall paper and masking tape will be needed. On one side we need a wall where the group's contributions can be posted and visible for every body to work.

Following our model, the workshop will create multiple opportunities for inter and intra personal dialogues. The latter involves an alternation of dynamics in which participants are guided to dive into their inner world, and to reflect on it. After that, a group discussion will be elicited by asking questions.

The first moment will be used to become aware of the here and now, to leave behind all ideas and preoccupations we came with. Personal introduction of the participants will also take place at that moment. During the second phase the group will listen to different kinds of music and observe what it does to them; what perceptions they are aware of; which feelings different pieces of music arouse; what thoughts and frames of mind have been awakened; and, how we react as whole persons. Everybody takes personal notes and shares them afterwards in plenary; we reflect on the group outcome, special emphasis is placed on acknowledging diversity. The third moment will bring us to a new piece of knowledge: the desperate cry out of our world's whales to: notice how everybody assimilates the information depending on how new it is; be attentive to anger, fear, love, and figure out what you can do to alleviate the situation; share with the group how everybody has faced their perceptions, emotions, thoughts and values. The last period in the workshop will be an opportunity to construct a model of the group's shared learning process with the input of what every individual shared in each moment. The focus will be on discovering how we can theorize on our own about the information shared to reflect on a small process of learning in a group. At this stage we will also ask participants to evaluate the workshop. To close, we thank participants and exchange final comments.

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Understanding Transformational Learning At Multiple System Levels: An Analysis Of Critical Incidents Of Executive Learning

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Abstract

This paper offers findings from an evaluation study of an action learning-based executive development program built on a developmental theory of change. Our critical incident interview approach allows evaluators to discern intended and emergent outcomes at multiple system levels. While most outcomes identified by participants and their supervisors may be attributed to a confluence of influences, there was little doubt the executive development program played a key role. Our research tracks a growing capacity for transforming leadership as a process of incremental shifts in awareness, action, and function at individual and collective levels.

Keywords

Theory of change, evaluation, executive development, transformational leadership

Introduction

Increasingly, leadership development is more open-ended, focused on learning through challenging experiences, knowledge and skill development, and solving real business problems as in action learning-based leadership development. Within these complex program designs are opportunities for individuals to self-identify outcomes; and for serendipitous outcomes to emerge from the experiences, the settings selected, and the challenges faced. When participants work on workplace problems in action learning programs, they not only learn by doing, but also come face-to-face with the messy, ambiguous reality that exists outside the classroom (O'Neil, J. and Marsick, V., 2007). In addition, participants enter such leadership development programs as part of moving, fluid situations—with a past set of experiences and a present context having as much to do with what is learned as the program itself. When the participants are at as high a level as those in the program studied here, they bring a vast repertoire of previous experiences, education, and business acumen to bear on what is learned. Development programs must be tied to the level and scope of their work, thus programs tend to be more exploratory, work–embedded, with learning experiences that emphasize judgment, and strategic, global thinking. Given the strategic roles of the individuals involved and the work-based activities employed in the learning process, the organization is inevitably impacted.

Programs for senior executives seek to hone key skills, and to transform perspectives to enable a broader vision in preparation for new positions that demand a bigger scope or range of vision. "Theories of transformative learning (which are often concerned with individual growth and learning) and of transformative organizational change (which are typically focused on system-wide, instrumental goals) arise from different disciplines to describe, understand, and support very different purposes and processes. . . . " (Watkins, Marsick, Faller, 2012, p.375). Kurt Lewin (1947) and Argyris and Schon (1978, 1995) take a social action perspective that looks at the learning of individuals as members of a social system that they simultaneously influence and are influenced by. Individuals who are transformed make changes in the environment that enable others to likewise transform and together act upon the environment toward desired goals.

Theory U (Scharmer, 2007) brings another dimension to our understanding of transformative change leaders. They lead by seeing differently, from outside the normal boundaries of their own experiences and of the organization, in order to allow the future to emerge. Scharmer's view focuses on the change in the individual that transforms the system. For Schein, transforming the system is always changing the culture: "What then do we mean by generative learning or transformation of a system? If the organization's "knowledge" both explicit and tacit ("know-how") is embedded in the culture and in the alignment of its sub-cultures, then it follows that transformation is tantamount to a change in the culture itself —a change in the organization's sense of identity, its goals, its core values, its primary ways of working. . ." (as quoted in Schein, 1996, p. 5).

This context and these views of leadership for transformation led us to rethink evaluation of emerging program outcomes, focusing on change at different levels. A more robust approach that examines both intended and emergent outcomes that impact both the individual and the organization is a developmental, theory of change

approach (Patton, 2011). Watkins, deMarrais, and Lyso (2011) note, "The complexity of commingled individual and organizational outcomes and learning capacities that vary by whatever previous capacities individuals and organizations brought to the development activity requires us to rethink evaluation of emerging program outcomes, focusing on change at different levels" (p. 8). An adaptation of the Theory of Change Model of evaluation (The Evaluation Forum, 2003) was used in this study to capture this array of outcomes.

A Theory of Change model asks those responsible for leadership development programs to identify the theory of change that underlies their leadership development program. Program providers identify relevant activities and show how they are linked to intended outcomes of the program. Of particular interest for programs based on action learning that operate at individual, team, and organizational levels is that the theory of change model specifies outcomes at four levels (The Evaluation Forum, p.6) as shown in Table One.

Table 1. Four Levels Of Change

Level	Changes
Short-term Individual Level	changes in knowledge and skill in the program
Intermediate Individual Level	changes in participant behavior demonstrated at some period after the program
Organizational Level	changes in the organization that result, in part, from expanded roles of participants
System Level	changes that result in new policies, procedures, etc. that result from having better trained leaders in the organization

Methodology

The paper reports findings from two evaluation studies of a senior executive development program in a large global healthcare corporation. Key components of the nine-month long program were the use of global locations, case-study and traditional pedagogies to teach content in four domains [innovation, globalization, strategic thinking, and communication], action learning projects, leadership assessments, and individual coaching. The purpose of this critical incident study was to use a developmental, theory of change model of evaluation to explore the extent to which a senior executive development program fostered transformational learning of participants. The study sought to answer the following question: To what extent do executives participating in an open-ended learning program exhibit a growing capacity to lead and to transform at four levels-- individual, intermediate, organizational, and system levels?

A primary data collection tool used to capture emerging changes for the individual executives within their organizations was the Critical Incident Technique (CIT), initially developed by Flanagan (1954). We used a more narrative form of the CIT (Ellinger and Watkins,1998) where participant narratives of incidents are collected as a means to increase understanding of both behavior and reasoning of individual actors within an organizational context. Our CIT questions began with the stem: "Think about a time when…" and asked participants to give specific incidents where they used what they learned in the development program in each of the core competence areas identified by program designers. From these data, evaluators identified the extent to which program activities led to intended outcomes, and potential areas where causal linkages may be fragile or broken. The approach provided an opportunity to capture managers' reflections and self-reported program outcomes. In addition, supervisors gave similar critical incidents from their observations of the participant in order to establish triangulation of new behaviors.

The sample in Cohort One consisted of critical incident interviews conducted by telephone with 14 of 15 participants and 9 of 10 supervisors[1] four months after the program ended [N = 23]. A second interview was conducted one year after the end of the program with all participants [14] and 9 of 10 supervisors [N = 23]. In cohort two, we interviewed 18 of 19 participants, and 11 of 14 supervisors [N = 29]. Overall, across both studies, we conducted 93 interviews. All interviews were transcribed. A subset of these data were selected for analysis for this paper consisting of 15 participants and their supervisors across cohorts one and two. Data from all interviews

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[1] Several supervisors had more than 1 participant.

relative to each participant were analyzed [four per person in cohort one; two per person in cohort two; N for this analysis = 50 interviews].

These data were analyzed by looking across participant and supervisor interviews inductively using a modified constant comparison method blending open and selective coding (Glaser, 1998) to generate key findings in each of the program areas of interest. The first iteration of coding resulted in the development of a theory of change model to report our understanding of the causal model undergirding the learning program and the outcomes we observed at multiple levels (see Watkins, deMarrais, and Lyso, 2011). Using the theory of change approach, we returned to the data for a second analysis, with a focus on how participants exhibited a growing capacity to lead and to transform at the four levels of the model. Data were organized into individual cases with a focus on the individual participants' reflections of their growing capacity to lead and transform the organization supported by their supervisors' reflections on them. Using an inductive thematic analysis process (Roulston, 2010), each researcher analyzed one third of the cases, coding interviews of both the participants and their supervisors. We then conducted a cross case analysis identifying common categories across the cases for ways learning and leading the organization were described. Our final step was to classify themes from these categories into the four levels of the theory of change model.

Findings
Looking across each of the participants and their supervisors for illustrations of a growing capacity to lead and to transform systems, a number of themes emerged. In this section, we outline key examples of these themes at each of the four levels of this model.

Individual level
Capacities that stood out as most likely to promote transformation were those related to increased confidence as a leader and perspective shifts that enabled the individual to take a broader view. For example, a participant reported, "One of the things that's helped has been a broader interest in transforming the organization and establishing an identity that certainly has been a facilitator in helping me to leverage some of those learnings from an innovation standpoint but also to help put into practice some of the leadership skills . . .." A participant promoted during the program said he was now "playing at a different level, interacting with the top of the organization and the board. . . I certainly felt ready to do that, and some of the things that I did learn about myself in [the Program] probably contributed to that overall confidence,.. . . being in a room of peers across an organization – . . .you've got to be on your game, you know? And I think that those interactions that we had, both formal and informal, probably contributed to my ability to participate at the level I'm at now."

Often, supervisors observed changes not readily apparent to the participants. A very senior level participant commented that one constraint he had in using new skills was that he "had them coming into it;" but his supervisor noted "The program has helped him understand a little bit more about his values as a leader and how to deal more constructively with conflict. People sometimes get more than they recognize. He is extremely intelligent so he truly captured the essence without fully recognizing that." As one participant put it, it is hard to see changes that emanate from one influence when so many are in play: "It's difficult to talk about a Eureka moment of that magnitude; and even if you did, there's so much thinking going on in your head, so many lessons, so much experience, when you make a decision- it's difficult to point out just what [influenced it]".

In Cohort Two, a participant reported that "the scope changed." In addition to perceiving herself as more capable of leading change in her unit, she became more open to peer feedback that held her accountable "…not able to squirm out of what they were telling [me] I needed to do differently." Yet, there was a gap in what she experienced and what happened as reported by her supervisor. In his view, she "is very good on the process side" of her work, however she lacks the "roll up the sleeve mentality" to "drive more innovation out of the organization." Clearly, individuals' perspectives changed, but there were sometimes gaps between the changes they experienced or acknowledged, and what their supervisors observed.

Intermediate Individual level
Within their units, leaders brought back what they learned to teach new skills to subordinates, enhanced their mentoring of subordinates, and attempted to behave differently to enact what they learned through increased collaboration across functional areas. For example, one participant, faced with significant restructuring within the company, reported how he used leadership and participant demonstrates how insights at the individual level lead to intermediate level impacts. "What struck me is that innovation doesn't necessarily happen from the West and goes East which has been a typical practice for us. I was able to take a step back and ask myself what value can I bring to my organization through my team. I started to think out-of-the-box and began putting a strategy forward where we

start systems in the East and move them to the West…and people are listening to the approach." A supervisor described this change in his subordinate: "He saw it as an opportunity not just for him to go and give a presentation, but actually included his finance controller and his HR person to come in and give overviews, so he used it as a developmental opportunity for them as well." Working across functions and teaching new skills to subordinates, participants shared their learning with their units.

Organizational Level

Over time, we observed a move from an initial focus on using new skills and making personal adaptations, to seeing themselves differently within the organization. They changed the scope of their vision- from unit- focused to a broader system view, incorporating more complexity both in their understanding of core tasks [e.g. innovation and globalization] and the way they approached talent development. One individual said "I think it's something that we changed the way we lead, that . . .if you learn something, share it with the people." A supervisor noted, the "program has further given him sensitivity and the understanding of diversity. . . . there have been leaders who did not go to some of the countries and he has gone to almost every country, . . he certainly has been mindful to the needs of the diverse region he has." Another participant described his broadening perspective not only across business units, but across geographic regions, "I think one of the big values that the executive leadership program had given me was around maybe looking at situations from a more holistic perspective, across functions, across geographies, whatever, as we were looking to do [program], which was this reorganization, knowing that we were going to be disrupting several thousand people's jobs."

Talent development was a core competency of this organization, and the participants understood their role in this as a result of this program. A supervisor commented, "He has a great part of his subordinates who have dotted-line responsibility. But he plans quite well their development, and he is very attentive to it. . . . I do leadership reviews with him about his people, and he is quite in tune with their development, and he works on it constantly."

Participants' organizational level impacts are well-captured in this description: "we had a 'road to Damascus moment' where we changed completely what we were thinking [about] how we were doing things…my organization has changed in that one part of my organization was very transactionally focused and with acting on eliminating a senior person in that team and also empowering the next level of the organization, I got them to redesign the organization to . . . be more responsive to the needs of the customer."

System Level

At the system level, participants and supervisors noted the impact of a shared language on the system's capacity to grow and to innovate. One supervisor said, "'the overall support-from the organization is probably created by having many [single] leaders understand[ing] more about the program." Or, put another way, one supervisor noted, "His lingo has changed."

Participants and supervisors were conscious of the cumulative affect of having key people at the top of the organization participating in the program. One commented: The first is that over time a powerful system will be . . . after three or four of them go through, I'm anticipating that there'll be a critical mass of people who think in similar ways and understand the cultural nuances, strategic direction and some tools of the trade better than they would have without the program. And they'll have a common language to speak. Now, that's important, because historically we haven't had that. We've been an organization where we acquired a bunch of companies that imported their cultures and gone public and hired a bunch of new people in—and I'm one of them. And there really hadn't been much of a social substrata for people to meet on common ground and start to think about the future together. So that's the system benefit that I anticipate seeing.

Finally, we observed patterns in the perspective shifts of participants and their supervisors. We learned that while some surface changes such as using new tools or a new presentation were readily observable by peers and subordinates, the more important, subtle changes in leadership were not. These changes were generally more cognitive, such as a broadening of one's internal vision; a change of confidence in dealing with others; a greater awareness of listening more carefully; and mentoring and developing subordinates. These changes were best reported by participants or their supervisors. One participant, a senior leader, stated, ". . . as you get into any kind of senior level position, . . . one of the things that benefits the organization is trying to make stronger managers out of individuals. . . . . So the fact that I'm making more personnel changes, that I'm trying to be a more effective manager at my level and I'm trying to mentor people in the organization, I think all of these things tend to strengthen the organization."

Conclusion

Globalization, volatility, the rapid pace of change and the adaptive nature of challenges leaders face provoke new ways for facilitating learning. In this paper we present a theory of change as an heuristic to evaluating learning as it shapes timely action. Emerging from the critical incident interviews was the articulation of growing capacities at both individual and collective levels. At the individual level, each participant described changes in the way they enacted their roles and function as leaders in the organization. At the collective level, participants articulated a shift in their capacity to take the process of change across the system and to act in new more collaborative ways. The potential of this qualitative approach to reveal changes at multiple levels through action learning-centered developmental programs has significance for those who would document emerging individual and organizational outcomes.

Evaluation using a theory of change model as an interpretive heuristic focuses us on the essential premise of development programs—that through this set of activities, individuals will change. The model makes this assumption more transparent and more challengeable, and explores potential benefits and emerging outcomes at organization and system levels. With so much invested in executive development programs, and so little invested in evaluating them, a theory of change is one way to ascertain program outcomes when results are less predictable, less measurable, and potentially far more impactful.

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Nurturing Living Systems Awareness as a Core Capacity for Co- creating a Vibrant, Sustainable World

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Abstract

How can we design learning experiences so that they mimic an ecological or *living* system? How can learners fully *experience* a group as a vibrant, organic whole? This experiential session invites participants to open up to *living systems awareness*: We will explore nature's principles and patterns of organization as a design language for creating dynamic learning communities, engaging our bodies, hearts, and minds. Living systems awareness grounds us in the relational wisdom of nature, supports adaptability capacities needed as agents in a rapidly changing world, and offers an embodied design process for co-creating regenerative solutions for a healthier world.

Keywords

Living systems awareness, sustainability education, whole-person learning, learning communities, multiple ways of knowing, regenerative design, emergent creativity

Imagine a learning community as a wetland or a forest. Imagine a group of learners as an organic, highly interdependent community, a living system not unlike an ecosystem in nature. Listen to the hustling and bustling of all its life forms; feel the pulsation of this living organism as a whole. Now remember participating in a learning experience that felt particularly vibrant, an experience that had a palpable sensation of aliveness. Remember a time when the group of learners seemed to embody an organic whole, an ecosystem with a life of its own, pulsating with energy and creating something new and exciting, something no single participant could have foreseen or created on his or her own.

Introduction: The Importance of Nurturing Living Systems Awareness in Education

All life unfolds according to the same basic principles and processes of organization, called living systems principles (Capra, 1996). These fundamental principles, such as networks, feedback mechanisms, resource cycles, and energy flows, provide an organizing language for ecological communities. Social systems, such as courses, workshops, conferences, and any kind of organization, including educational institutions, are also based on the relational wisdom of nature (Capra, 1996; Booth-Sweeney, 2008). When examining a social system through the lens of life's principles of organization, we can often discover where there are blockages and where the system is not as thriving and alive as it could be. Living systems principles offer key insights into creating a sustainable future (Capra, 2009).

The presenter suggests that teaching living systems principles must become a cornerstone to any instructional design approach for preparing students as change-makers for a healthier world. How, then, should educators teach about living systems? Most importantly, the mind alone is not enough to guide us in applying life's principles of organization to designing a healthier world. We also need to experience these principles with our whole being, including our bodies and hearts. Leading scientists and sustainability scholars increasingly speak to the importance of heartfelt relating. Hawken (2007) states: "To salve the world's wounds demands a response from the heart" (p. 188). Uhl affirms this: "In the end, it is not new laws or more efficient solar cells that will play the leading role in solving humankind's environmental and social problems, it is our awakened and caring hearts. When our hearts awaken, our resolve quickens, our courage grows, our compassion stirs, and our imagination expands" (Uhl, 2004. p. xx).

When we fully understand, perceive, and experience the relational wisdom of nature, with our hearts and our whole being, we are in living systems awareness. Living systems awareness, in other words, refers to a lived experience of life's principles of organization through multiple ways of knowing. When we learn to experience and take action from living systems awareness, we are more likely to become effective change- agents even as life circumstances become more difficult. Educational institutions, which prepare our future decision-makers, must therefore play a key role in nurturing living systems awareness.

Nature's Organizing Language as Foundation to Living Systems Awareness

In order to prepare for the educational framework suggested in this paper, it is useful to review the basic organizing principles of life, or living systems principles, more closely.

Booth-Sweeney (2008) provides a very accessible definition for living systems: We use the phrase *living systems* as a metaphor, to represent an animate arrangement of parts and processes that continually affect one another over time. There are living systems on all scales, from the smallest plankton to the human body to the planet as a whole. When we understand what makes up a living system, we can see that a family, a business, and even a country also are living systems. (p. 3)

Living systems characteristics have been broken down into anywhere from four (Macy & Brown, 1998), to six (Capra, 2002), to more than 12 (Booth-Sweeney, 2008) interrelated principles. For example, Capra (Center for Ecoliteracy, 2011) defined the following principles:

- "Nested Systems: Nature is made up of systems that are nested within systems. Each individual system is an integrated whole and–at the same time–part of larger systems.

- Network: All living things in an ecosystem are interconnected through networks of relationship. They depend on this web of life to survive.

- Dynamic Balance: Ecological communities act as feedback loops, so that the community maintains a relatively steady state that also has continual fluctuations.

- Cycles: Members of an ecological community depend on the exchange of resources in continual cycles.

- Flows: Each organism needs a continual flow of energy to stay alive. The constant flow of energy from the sun to Earth sustains life and drives most ecological cycles.

- Development: All life–from individual organisms to species to ecosystems–changes over time. Individuals develop and learn, species adapt and evolve, and organisms in ecosystems coevolve. (Center for Ecoliteracy, 2011)

Most importantly, Capra (2009) determined that the characteristics of living systems in nature all have to do with relationships in community. Nature continuously changes, unfolds, and develops through its dynamic relational patterns, structures, and processes. Contact and communication between system components and systems are at the heart of life continuing and unfolding, and aid in what is essential to any living system: its capacity to renew itself and develop new complexities, which is the capacity of autopoiesis. These life-giving relational dynamics are not unique to natural systems, they apply to social systems, as well (Booth-Sweeney, 2008; Capra, 1996, 2009). Social systems of any kind (families, organizations, learning communities) unfold and develop through dynamic interactions in continuous feedback with each other.

Education as Patterning for Life

Living systems principles, such as those identified by Capra above (Center for Ecoliteracy, 2011b), can be considered *metapatterns of nature*. Metapatterns provide rich opportunities for creating a dynamic structure for living systems educational design. The theoretical significance of metapatterns as providing a process for making connections across scales and contexts and translating inherent life wisdom into educational design practices has been discussed by Volk and Bloom (2007a, 2007b) and was originally inspired by Bateson (2002) who coined the term "the pattern which connects" (p. 7) in the late 1970s. Bateson emphasized that all patterns are not fixed but rather a dance of interacting parts.

Ecopsychologist Fisher (2002) proclaimed the need for awakening *unactivated interactional patterns* as an essential recollective practice needed for the healing of people and the planet. In education, the presenter suggests, there are layers of unactivated interactional patterns that are repressed, untapped, or not cultivated enough. There is a disconnect if the learning modality embodies a traditional hierarchical structure (lecture, conference presentation,

panel with questions and answer) while the content explores decentralized, pluralistic, highly interdependent dynamics. Similarly, there is a disconnect if the learning or conference modality is limited to a cognitive-rational mode of relating dominated by verbal dialogue, while the dynamics of life and vibrancy inherent in sustainability call for us to become engaged as whole, vibrant beings prepared to protect life on Earth. Thus, participants experience an incongruence, or, at the very least, a *pattern-poor* rendering of the topic.

Patterning for Design for Autopoiesis

Nature's pattern dance is designed in ways that allow for self-organizing, self-renewing developments within structures and processes described by nature's pattern language and organizing principles. This emergent process is often referred to *autopoiesis*. Autopoiesis, literally translated as self-making, is really a process of us-making. The three main conditions for autopoietic developments include—a boundary that is semi-permeable, components within the boundary that continually regenerate each other, and interaction with the environment outside the systems boundary (referred to as *structural coupling*) — all together result in continuing adaptation, learning, and development.

The three characteristics of autopoiesis are significant in the context of designing learning experiences for education for a healthier world. An educational system (class, workshop, conference, or university as a whole) that is alive similar to an ecosystem will develop strong but permeable boundaries ("bounded"), build intricate networking capacities among its participants, and catalyze participants' growth and development ("self-generating"), and will allow for a continuous exchange with its environment for cross- pollination and development of new insights ("structural coupling").

When an educational system has a semi-permeable boundary or "membrane," when there is rich engagement and information exchange among learners within that boundary, and when the learning community draws inspiration from its environment outside the boundary, something new is likely to arise that is greater than any participant could have come up with on their own. In order to revert the downward spiral of the industrial growth society, we urgently need to develop a multitude of life-sustaining innovations and regenerative design ideas in education. Because of the fragile state of the planet, an autopoietic approach to educational design is very timely.

Dimensions of Learning Experience Design

This paper proposes that designing learning experiences in congruency with life's principles of organization involves intentionally engaging multiple dimensions of learning experience design: how we set up the visible and invisible learning space (*structural-spatial dimension*), how we pace learning components and allow for flow according to nature's rhythms (*rhythmic-temporal dimension*), how we allow for creative expression in learning (*expressive-extrarational dimension*), how we encourage the mind to understand and utilize systems analysis and systems design across disciplines (*cognitive-rational dimension*), and how we integrate this awareness in our practice (*practical dimension*). If all these dimensions mimic and stimulate living systems dynamics, learners are more likely to co-create life-sustaining ideas, designs and structures.

Drawing on these five dimensions, as well as on transformative learning scholars Heron (1992), and Yorks and Kasl (2002, 2006) who describe a pyramid of multiple ways of knowing that is grounded in direct experience, the presenter has developed an integrated model illuminating multiple dimensions of learning experience design (Widhalm, 2011) (see Figure 1 below): Life, or embodied, lived experience, lies at the very foundation of knowing, informing, through expressive-extrarational "osmosis," the cognitive-rational and practical dimensions of knowing. In addition, the structural-spatial dimension describes all the visible and invisible space considerations of a learning experience, including the room setup and constellations of physical and virtual individual and group learning spaces with various degrees of planned and open-ended structure. The rhythmic-temporal dimension pertains to the timing and pacing of a learning experience, including time allocated for active as well as slower, integrating times. Engaging learners through expressive-extrarational learning within a careful design of learning rhythm and space has the potential to enormously deepen the experience of cognitive-rational and practical learning which are more traditionally higher education's stronghold.

Figure 1. Dimensions of learning experience design. (Figure created by presenter)

Metapatterns of Nature as Foundations of Learning Experience Design–Membranes and Patterns that Connect Organically

A literature review of transdisciplinary literature on transformative learning and education, ecopsychology, systems-based group facilitation, and indigenous ritual design (including Bache, 2008, Brown, 2005, Dirkx, 1997, Ferrer, Romero, and Albaredo, 2005, Fisher, 2002, Heron, 2009, Lange, 2009, O'Sullivan, 2004, Somé, 1999, Yorks &Kasl, 2002), has prompted the presenter to suggest two overarching metapatterns for an initial design framework toward vibrant learning experiences: membranes, and patterns that connect organically. Integrating the above discussions on metapatterns, living systems principles and autopoiesis, and dimensions of learning experience design, the presenter offers a description of each metapattern, both from an ecological perspective and an educational design perspective.

Membrane

A membrane is a permeable boundary that gives a living system a distinct place to be and evolve. It controls what kind of energies and nutrients migrate across the boundary. It allows for a space nested within larger spaces that also have membranes, nested within yet larger systems and so on. In social systems, a membrane creates a sense of safety, identity, and belonging to a whole distinct from, yet interconnected with, other wholes. The membrane is a container that can only exist in community. A teacher alone cannot create the membrane. It needs witnesses, peers, places in which learners have the opportunity to be seen and to see. An intentional creation of a membrane creates a field that is fertile for transformation.

Creating a sense of membrane goes beyond dedicating space and time to meet as a group, however. There are plenty of unused and underutilized membranes in nearly any academic learning experience. Every conference that starts and ends with a series of speeches and neglects the opportunity to invoke a participatory ritual of belonging, for example, leaves its membrane potential un-activated.

Patterns That Connect Organically

Within the membrane, system components engage in different patterns of relating. In any living system, continuous flows of information, energy, and nutrients are exchanged in a dynamic balance of giving and receiving through intricate feedback loops. They form a complex network of relationships, from the cellular to the global level. Creativity happens at what the presenter calls "living edges," at the places where one or more components interact. In nature, some of the patterns that connect can be seen, such as meanders in streams, ripples in a lake, branching patterns in trees, network patterns of a spider web, spirals in snail shells, or honeycomb patterns. Underneath are also countless intricate unseen patterns of relating, patterns of energy and information, and chemical exchanges on molecular and cellular levels. This movement is not controlled by a single entity, it continually self-organizes. Patterns that connect are not fixed. They are always in motion, flux, and ever changing. Creating patterns that connect, therefore, goes beyond providing for an alternation of large group and small group experiences, or keynote sessions and topic workshops. Critical here is the notion of fluidity, of unpredictability, of change.

Patterns connect in new complexities if they are given time and space to connect, if allowed natural rhythms of gestation and activation, of disintegration and integration, of ebb and flow, of the four seasons. Learning experiences, designed as living systems, need gestating spaces where things are allowed to percolate, jell, simmer, before they can transform. Nature has cycles of day and night and seasons for this process to unfold, and provides countless niches and spaces protected by soil, skin, and bark where components disintegrate and slowly reintegrate.

Reviewing the key processes of autopoiesis, Table 1 relates these two overarching metapatterns to the primary autopoietic conditions and processes.

Table 1: Autopoiesis Applied to Instructional Design

Autopoietic Condition	Educational Design Approach
Bounded	Membrane
Self-Renewing and Structural Coupling	Patterns that connect organically, providing ample opportunities for contact and cross-fertilization within and across the systems boundary while honoring cycles and seasons of development

Thus, the presenter suggests, an educational design approach according to metapatterns of nature, particularly those that allow for an intentional design of a membrane and multiple patterns that connect organically, is more likely to generate autopoietic, emergent developments.

Application to Conference Session

During the conference session, the presenter will engage participants in living systems awareness through multiple ways of knowing. Together, we will:

- explore objects and patterns of nature to guide us in nature's pattern language and invite a felt sense of connection with life's relational wisdom
- engage in movement as a group to allow us to experience living systems awareness in our bodies
- examine a series of guiding questions and examples of living systems educational design based on the metapatterns of nature introduced above. These are presented in Chapter 3 of the presenter's dissertation (Widhalm, 2011a) which is downloadable for free.
- become familiar with the presenter's framework of mapping Capra's principles of living systems against multiple dimensions of learning experience design (structural-spatial, rhythmic-temporal, expressive-extrarational, cognitive-rational, and practical-applied), providing examples and guiding questions for educational design across each of these dimensions for each of the six principles.
- invite sharing and feedback on how to integrate living systems awareness in our communities of practice and how the presenter's framework could be adapted and enhanced in participants'
- respective contexts of engagement.

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The Hero's Journey as a metaphor for personal transformation

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Abstract

Philosophically and theoretically informed by Jungian psychology and based on extensive mythology research, the *Hero's Journey* reflects an inclusive conception of transformative learning theory that focuses on the centrality of emotion in the personal transformation experience. Through critical self-reflection, *The Hero's Journey* provides a framework that guides individuals in understanding that significant personal growth and transformation are often accompanied by challenge and tension, but often the greater the challenge, the more significant the personal fulfilment and self- growth.

Key Words

The Hero's Journey; metaphor; emotion; inclusive; personal transformation; critical self-reflection

Introduction

Truths about what it is to be human have been expressed in stories, myths and legends for eons. Premised on the notion that myths are psychologically valid and emotionally realistic, they could be considered as accurate models of the human mind and applied to understanding stories of personal transformation. The focus of this paper is that through the use of mythic structure as espoused in *The Hero's Journey*, individuals can come to appreciate that personal change and difficulty can be a positive force that leads to deeper self knowledge, self awareness and ultimate personal transformation. This paper begins with a brief overview of various conceptions of transformative learning theory, offering an 'inclusive' conception as one way to capture the multidimensionality of transformative learning. It then outlines *The Hero's Journey* as a metaphoric tool to explain personal change, discussing its synergies with an 'inclusive conception' of transformative learning. Data gathered over a ten year period are provided as testimony to how *The Hero's Journey* has enabled adult students in an Australian pre-university preparatory program to articulate their experiences of personal transformation.

Conceptions of transformative learning theory

The organic nature of transformative learning theory is best exemplified by its different interpretations and re-conceptualisations over its more than 30 year history. From Jack Mezirow's (1978) traditional cognitive, rational conception that relied heavily on critical self-reflection, alternative conceptions have emerged, many of which acknowledge the emotional and extrarational dimensions of transformative learning. Thus, adding to the cognitive-rational conception (Mezirow, 1978, 1991, 2000, 2003; Taylor, 2000) are other theorisations, including a constructivist-developmental conception (Cranton, 2002, 2006; Daloz, 2000; Kegan, 2000; Taylor, 2000; Tennant, 2005; 2010); an extrarational conception (Boyd, 1991; Boyd & Myers, 1988; Cranton, 2000; 2006; Dirkx, 1997, 2001, 2006, 2008; Scott, 1997); and an ecological conception (O'Sullivan, 2003).

Given the varied conceptualisations of transformative learning, it is inevitable that a degree of overlap between elements of the conceptions has occurred. Premised on this notion, and by no means purporting a new theorisation, this paper presents an 'inclusive' conception of transformative learning theory as a fusion of the cognitive, developmental and extra-rational dimensions of learning. Inexorably bound in such a multi-dimensional conception is the construct of emotion, the conduit through which human reactions to personal transformation can be made manifest. In acknowledging the interplay of the cognitive and the emotional in the process of learning, Wolfe (2006) considers emotion to affect what is learned and what is retained, similarly reflected by Zull (2002, p. 75) who believes that emotions "influence our thinking more than thinking influences our emotion." Manifestations of emotion can therefore be representative of the inconsistencies, contradictions and fuzziness (Edwards, 2001) that individuals can experience during personal transformation.

An 'inclusive' conception of transformative learning theory closely reflects Cranton's view of transformative learning. Her interpretation places emphasis on the feelings people have "when they work outside of the realm of cognitive rationality and find deep, powerful shifts in the way they see themselves and the world" (Cranton, 2006, p. 77). Cranton is of the opinion that personal transformation can occur in ways other than "a reasoned, critically reflective progression" (2006, p. 70) and can be instantaneous, a deep and thoughtful moment, or a gradual "unfolding of the creative process revealed nonverbally and moving from tacit to explicit" (p. 71). Cranton views an event that disorients or unsettles the individual and the subsequent questioning of one's assumptions and perspectives as two initial phases of transformative learning. Discourse and dialogue with others, in addition to support of various forms, represents a third crucial phase of transformative learning.

The somewhat erratic trajectory of learning about self that can evoke a range of emotions should not be problematised but rather appreciated as a compelling manifestation of the personal change process. Dirkx (1997) refers to such complexity and disorderliness and has long called for the holistic and conscious integration of expressive or emotional-spiritual dimensions into daily experiences. He suggests that nurturing soul is "an attempt to embrace the messiness and disorder that is adult learning" (Dirkx, 1997, p. 84) and advocates for the use of story, song, myth, poetry, and everyday life experiences to nourish soul, allowing emotions and feelings to assist individuals in learning about their relationships with the broader world (Dirkx, 1997, p. 83).

Story and myths as tools for transformation

In their replication of the trials and tribulations that we experience as part of understanding what it is to be human, fairy-tales, classics, myths and legends can give meaning to our lives. In his extensive study of world hero myths, Joseph Campbell (1993) found that all myths pass through the same stages and fundamentally tell the same story, albeit in different ways. He found that regardless of time or place, the collective unconsciousness of the human race is represented in the recurring patterns across all cultures and that these universal themes sprang from the depths of the mind. Focusing on the quest of making sense of life and self, Campbell (1993) framed change and difficulty as a positive force despite the challenge of setbacks and difficulties that they can pose.

Campbell identified various stages that may be identifiable in our lives, stages that do not necessarily present themselves in a linear fashion but in such a way that most individuals can see the similarities between myths and personal life events. In an adaptation of Campbell's (1993) research, Hollywood screenwriter Christopher Vogler (1996) constructed the following twelve stages of *The Hero's Journey* as representative of the sequence of events that indicates personal transformation:

1. The ordinary world

2. The call to adventure

3. Refusal of the call

4. Meeting with the mentor

5. Crossing the first threshold

6. Tests, allies and enemies

7. Approach to the innermost cave (the second threshold)

8. The supreme ordeal

9. The reward (seizing the sword)

10. The road back

11. Resurrection

12. Return with Elixir (freedom to live).

A conception of transformative learning that suitably underpins *The Hero's Journey* is therefore one that synthesises the cognitive-rational, the constructivist-developmental and the extrarational interpretations of transformative learning theory. A conception that is inclusive of these seeks to account for the erratic, emotionally charged personal experiences that be evoked when new knowledge challenges old ways of knowing and being, taking the learner to an unknown space. This 'space' is often typified by confusion, uncertainty and challenge as the learner leaves the comfort zone of the known, crosses the first threshold, and encounters trials as they are challenged to 'unlearn' old habits. The past must be deconstructed before the learner can reconstruct the future, but once the future is reached, the learning can be said to have been truly transformative.

Application of the Hero's Journey framework

Many students in the pre-university *Skills for Tertiary Education Preparatory Studies* (STEPS) program at CQUniversity Australia are adults who are crossing from the old world of their past experiences into the alien world of academia and its associated discourses. Many relay prior negative schooling experiences so STEPS attempts to challenge and expand their belief systems, not only about themselves as learners, but also about learning itself. Typically, most students come from low socio-economic status backgrounds and are the first in their family to attend university. Aged from 18 to 65 years of age, most students engage in paid part-time

work while they study the 12 or 24 week on-campus or distance STEPS program and the majority have significant family and other commitments and responsibilities

The Hero's Journey has long been advocated in STEPS as a powerful self-reflective tool in helping its students understand that although their formal learning journey may be difficult on many levels, the inner and outer journey that is taken can result in significant personal growth and transformation. Through the use of private journals, students are actively encouraged to record and critique their feelings when long held assumptions about themselves and their world are challenged. Such self-reflection can be a powerful stimulus in the deconstruction of prior assumptions that may have hindered their growth, and in reflecting upon their responses to personal difficulties, many students experience significant self awareness and self knowledge. Numerous classroom opportunities for dialogue mean that it is not uncommon for students to share their epiphanies with the group.

There are clear parallels between an inclusive conception of transformative learning and *The Hero's Journey*, the fusion of the cognitive, developmental and extra rational dimensions. This is best evidenced in the words of STEPS students as they reflect on their STEPS journey. For many, *The Ordinary World* is a place they have become disillusioned with and the *Call to Adventure* provides the avenue of escape. As one student said, "I was unhappy at work. I long had this feeling that I could achieve so much more", while another lamented: "I was sick and tired of always being sick and tired. It was time for change". A single event can disorient or disrupt the student's ordinary world, calling them to adventure. In the words of one student, "My old world was filled with unhappy work experiences and the feeling that I could achieve much more – that I was worth much more. Losing my job was tough but it forced me to search for something new. I was being drawn by the forces of self-improvement". For other students, the call to adventure may be a more protracted yearning to satisfy unfilled aspirations, such as for one student who had been unemployed for a long period of time. As he said: "It was a challenge just getting out of bed. I knew I had to do something... to change my career direction, to face my fears and remedy the incomplete feeling I have always had".

The *Refusal of the Call* comes in many forms for STEPS students and is often related to the fear of changing or growing. Anecdotal evidence over the last ten years reveals that such fear can be related to "putting their private and public 'neck' on the line" (Cantwell, 2004, p. 12). Other students articulate the fear of failing self and family, or have reservations about how multiple life roles will be juggled. However, when students critically reflect on the obstacles they confront, many come to see how old ways of thinking have restricted their growth. As one student said, "I thought I was too old and crazy to contemplate huge changes at this time of my life", while another student's refusal of the call was the voice in her head saying, "You're too stupid". However, one student articulated how self-reflection on her refusal of the call had helped with the visualisation of new possibilities: "Feelings of doubt filled my head, wondering if the brain inside it still actually worked, but I realised that the only thing that was going to help me stop the cycle of drudgery was me".

In stories and myths, the mentor is typically the wise person who guides the hero in the quest. For STEPS students, *Meeting the Mentor* typically involves a family member or friend, or perhaps an experience that awakened something in them to the realisation that there is more to life. Often STEPS lecturers become mentors or students find mentors amongst their fellow classmates. Also, inspirational figures can act as mentors, articulated by one student who acknowledged: "My mentors were Teresa, Ghandi, Martin and Desmond, all together on the front of a magazine. They came with me every day in my bag and were there to talk to, to feel". Some students even focus inwardly to find their mentor, expressed by one student who said: "My mentor is myself really. I wanted to do something different with my life and I knew that I could do it".

Facing an early problem or difficulty and dealing with it represents the stage when STEPS students *Cross the First Threshold*. For some, it may be attending the first day of STEPS, as articulated by one student: "Walking into the room on the first day, everyone checking each other out and making judgements was very daunting". For others, the first threshold may be the submission of an assessment task or test, while the anxiety around having to speak in front of the class can test the courage of others. Sometimes the difficulty may be of a cognitive nature, such as trying to comprehend a new mathematical concept or having writer's block. For some students, crossing the first threshold can be very emotional and personal, like ending a relationship or a friendship due to a conflict of aspirations. As one male student said, "Unfortunately my boss didn't see uni as a good idea and took it as a personal insult that I would choose study over work. We had a fall out and we parted ways, never to speak again".

STEPS students typically confront many *Tests, Allies and Enemies* on their quest. Many students cite low income as their greatest test, while the delaying of tasks can be a significant enemy for some. As one student said, "Procrastination has always been my worst enemy. If I don't start something I can't be ridiculed if I fail". For others, self-doubt is a significant challenge, articulated by one student who said: "My biggest enemy through this journey would have been myself and not believing that I could accomplish my dream". Enemies

can technical challenges, such as for one student who metaphorically referred to her crashed computer as her "arch enemy". From an emotional perspective, enemies can be feelings of guilt due to reduced time with loved ones, or jealousy expressed by friends or partners. Allies, on the other hand, can be the people, thoughts, techniques and strategies that have helped the learner on their quest. Inner strength is another ally for some students, articulated by one who said, "There were many times I just wanted to give in but that wasn't going to help me so I was persistent and kept going". Increased self knowledge can also be an ally, as articulated by one student: "Over time in STEPS, I felt I could open my mind and slowly my perception of how I viewed life and the world in general changed for the betterment of myself".

As the STEPS journey continues, there are more challenges to face and many students *Approach the Second Threshold or Innermost Cave*. Such challenges may relate to another person, a circumstance that must be overcome, or an internal obstacle that is restricting progress, such as negative self-talk. For some students, a significant challenge can be dealing with resistant family members, articulated by one student who said: "My family have been told! I am now standing my ground at home and saying, hey, I am not putting up with this and hey, this is my time now". Other students confront challenges related to tension amongst class members, sometimes escalating in high levels of stress. As one student said: "Being in a class with adults, all doubting themselves, emotions flying all over the shop is stressful in itself... I found it difficult to be in an aggressive, disruptive atmosphere... thank God we had the week off... I needed it!"

The *Supreme Ordeal* is the hero's darkest moment when confidence may be lost and all seems bleak, yet the hero is able to rise up against anguish and seemingly overwhelming odds. For STEPS students, this is the toughest challenge, the moment when part of self is let go, such as a particular behaviour, resistance, old way of thinking or even a relationship. For some, the supreme ordeal may be of a cognitive nature, such as that articulated by one student: "The biggest ordeal for me was the research assignment... tears of being overwhelmed with the whole writing thing gave me mixed feelings of myself and what I could really do. For other students, the supreme ordeal can be of a personal nature, such as one who said: "I was very ill for four weeks and I struggled every day just to get out of bed. I came very close to quitting as I found it very hard to concentrate and keep on track". For some, it can be relationship pressures, as revealed by one student: "My relationship with my girlfriend ended two days before my maths exam... I thought my world had ended and that I could not go on without her. However I just gritted my teeth and decided to go on".

When the hero finds the reward and *Seizes the Sword*, certain perspectives about themselves and others are transformed and inner power is realised. Many STEPS students are emotionally strengthened and more resilient in coping with setbacks. As one student said, "Now as I look back at the challenges thrown at me, I'm proud of myself for not giving up and finally completing something I started". Another spoke of the enhanced personal insight he experienced : "My reward was to see that I wasn't so closed that there wasn't any way of coming back from my fears. I achieved something really important to me". The reward for others can come in the form of enhanced self-knowledge, as expressed by the following student: "I am very stubborn and set in my ways but I have come to realise that you need to let go of old ways to have room to embrace new ideas and challenges".

Equipped with new inner strength, the Hero travels *The Road Back*, dealing with the consequences of confronting the fears of their Supreme Ordeal. Many students have been stretched beyond their old selves and understand how capable their new selves can be. As one student said, "STEPS has changed me. I now feel able to take on a university degree and achieve the very best result possible – and I am looking forward to that challenge". Another revealed enhanced self knowledge when he said: "I feel stronger and happier for my STEPS experience. I know I can achieve anything now and I am only restricted by me, no-one else". Many students talk of new futures, such as one who said ,"The journey has come to the end... my mind is overworked and my body needs to sleep but I am so happy. My life will return to what it was but with new direction because I am a new person with different views of people and life".

Towards the end of STEPS, many students indicate their commitment to personal change and the relinquishing of old ways of thinking and behaving. *Resurrection* is achieved through the realisation of a greater range of options and a wider world to conquer. Overwhelmingly, STEPS students talk of increased personal confidence and self-esteem, the inspiration and motivation that they have acquired, and the deliberation to make changes in their world. As one student proclaimed: "I want to change the world, enhance it, embrace it", while another reflected on her next learning voyage, saying "My journey is not over...with my newfound experiences and knowledge, I must continue on. I want to help other people like myself ... lost. If I can help only one other person feel how I feel, it will be utterly and completely worth it".

The final stage of the Hero's Journey, *Return with the Elixir (Freedom to Live)* sees transformed STEPS students returning to their ordinary world after successfully completing what they set out to achieve. Armed with new knowledge, skills and confidence, there is no return to the person they once were, and despite

sacrifices in order to become the new person, they are now more responsible and open minded. As one student reflected, "I can't ever go back now - the woman who stared into her tea and watched the world, has gone. She has a new story now". Another student articulated similarly, saying: "Completing STEPS has changed me for the better. I have left my old self behind and reinvented myself for the better". For some, the elixir is love or hope and anticipation; for others it is wisdom, such as for one student who reflected: "Do you ever return to an ordinary world when the learning door is opened? It all seems forever ago and very mundane".

Conclusion

The Hero's Journey provides a very useful framework to explain the multidimensionality of personal transformation. Premised on an inclusive conception of transformative learning that synthesises cognitive, developmental and extra rational elements, it enables manifestations of emotion to mirror the inner self. As long held personal assumptions are identified and deconstructed, periods of uncertainty, chaos and tension can ensue. Yet, in recognising such challenges as critical starting points for personal change and growth, and appreciating that strength and resiliency will generally follow, the birth of a new person with new self-knowledge and self-awareness can be extremely liberating.

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Collaborative Inquiry and Transitions in Urban Ministry: Creating Time and Space for Reflexive Praxis in Community

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Abstract

Transitioning from formal education to application in context can be characterized by uncertainty and ambiguity. This paper examines how engaging in collaborative inquiry (CI), an action learning and research methodology, provided time and space for a group of faculty and graduates of a non-degree urban ministry program to reflect on their praxis together (Bray et al., 2000). Looking back at a holistic process that incorporated multiple ways of knowing, emphasized presentational knowing as a bridge for diversity (Heron, 1992; Kasl & Yorks, 2012), and attended to the role of spirituality (Tisdell, 2003), the two faculty members from the group explore emergent themes, share lessons learned, and suggest recommendations towards wiser, reflexive practice.

Introduction

Examining the period after graduation from formal theological education can be instructive to practitioners, educators and scholars. In a recent survey, only 20 percent of new graduates felt that their theological training had prepared them adequately for leadership and ministry (Foster et al., 2006). There is a need to understand how ministry leaders cultivate a "pastoral imagination" and learn the practical wisdom of ministry over time (Dykstra, 2008; Scharen, 2008). This paper and experiential session explore how collaborative inquiry (CI) can create a generative space for transformative learning and reflexive praxis during this transition (Bray et al., 2000; Yorks & Kasl, 2002).

In a three-month collaborative inquiry engaged by two faculty members and five graduates of an urban ministry leadership program during the summer of 2012, we re-imagined the contours of learning beyond the classroom. On a journey of being, knowing and growing in community, our CI evolved around prayer, food, dialogue, laughter, metaphor, and reflection on actions taken to answer a mutual question: *How can we improve our ministry practice by applying what we have learned at City Seminary?* This paper gives voice to the experiences of the two faculty members, one (Maria) with familiarity with CI and the other (Grace) exploring it for the first time.

Context

The Ministry Fellows Program at City Seminary of New York, an intercultural Christian theological learning community located in Harlem, is an eight-month non-degree program training urban ministry leaders. The program's philosophy of teaching is collaborative, and learning is understood as situated and contextual (Lave & Wenger, 1991). Students come from all walks of life; men and women, Pentecostal and Presbyterian, working in Wall Street and in churches, and are drawn by the prospect of learning to see and experience the city and ministry together in new ways.

Prompted by mutual interest in understanding how graduates were processing their learning, we (faculty members) invited graduates to join a collaborative inquiry on transitions in ministry. Some had independently begun to ask us for advice on putting ideas into practice. So we invited them and others we observed trying out new ideas to join the group, providing an article on CI as background. Two recent graduates and three alumni from the previous cohort joined us to form the "CI Praxis Group." We were diverse in age (20s to 50s), gender (male and female), profession (Christian educator, social worker, higher education administrator, etc.), neighborhood (Park Slope, Lower East Side, Upper West Side, etc.), ministry focus (youth, Christian education, leadership development, etc.) and ethnic background (Chinese, Puerto Rican, Caucasian, Nigerian, etc.).

Despite an extremely busy summer season, a schedule of five sessions was put together, and we convened at Maria's home for dinner, introduction to CI, and exploration of our group question. Everyone who came agreed to continue. What followed were a conference call, two blended (in-person and Skype) and one in-person sessions. Contexts and actions chosen to answer the group question were shared verbally (session 2), objects were used to describe actions taken in between (session 3), a picture card activity helped individuals explain the present state of

and future hopes for their ministries (session 4), and an image was chosen to describe their culminating experience of the CI (session 5). At the final session, discussion to continue on was met with both enthusiasm for the process and disappointment with the ability to commit because of schedules. At this point, the decision has been put on hold.

The process described above builds upon the work of Yorks and Kasl (2002) on collaborative inquiry incorporating Heron's (1992) multiple ways of knowing (Kasl & Yorks, 2012). Collaborative inquiry can foster transformative learning, understood as "a holistic and enduring change in how a person affectively experiences and conceptually frames his or her experience of the world in order to apply new actions in life contexts that are personally developmental, socially controversial, or require personal or social healing" (Kasl & Yorks, 2012, p. 509). It is "an experience leading toward wholeness," change that ultimately redefines who one is in the world (Charaniya, 2012; Tisdell, 2008, p. 28).

Emergent Themes, Theoretical Implications and Lessons Learned
Journals written by group members were coded for emergent themes, and in this next section, we tease out the following: 1) ambiguity and the open-ended nature of CI; 2) time, place and connection through multiple ways of knowing; and 3) faith and spirituality. Grace focuses on the data, and Maria reflects on theoretical implications and lessons learned.

Ambiguity and the Open-Ended Nature of CI
Grace: You could call it many things: inquisitive human nature, having more questions than answers, confusion, or a creative, organic process of learning and understanding, but whatever you call it, every member of our group experienced the sometimes unsettling feeling and other times surprising power unleashed by CI. AB noted the very thing that intrigued her and drew her into this CI was the prospect of "creating knowledge." JD wrote, "I was a little unsure and questioning what is this process after reading the article [on CI] and going to the first class." MLW, the most experienced member of the group, "was curious how it would go." IA called the approach "foreign" and was "unclear how collaborative members are . . . to express or explain their personal experiences." For him, the first session was a "coaching moment." After Session 2, MLW wrote of the "need to translate more clearly."

Then something clicked. After Session 3, MLW wrote, "When the Spirit moves, there is no telling where we will end up." IA wrote in his journal on the subway, "This session unlike the prior opened the locked door." In the serendipitous experience of so many things coming together in Session 4, GM described the evening like a Narnian experience of walking through the wardrobe or Alice in Wonderland, "walking through the mirror into another world and bringing all your senses." "How do we create something so satisfying? By letting God's Spirit in, participating, and inviting everyone to join in on the party." IA wrote, "WOW!!! Last night was WOW." JD shared, "I feel like this was a turning point…I really have come a long way."

After our last evening together, AB concluded, "It was interesting to see that the questions I ended up 'answering' were not my original questions, but were perhaps the more needful ones I didn't know to be asking before interacting in the group." She did note "it took us quite a bit of time to get the hang of the CI . . . and how it works. . ." KJ probably summarized it best. "So what feels awkward and vague at the beginning becomes more clear as everyone is participating and wading into it together. The different ways my classmates [we] approach the same topic/question helps me gain perspective." It is interesting, however, that even at the tail end of our journey, the ambiguity between being fellow travelers and students remained.

Maria: Collaborative inquiry (CI) is a "systematic process of action and reflection among co-inquirers who are tackling a common question of burning interest" (Ospina, El Hadidy & Hofmann-Pinilla, 2008, p. 131). Prioritizing practice as a source of knowing, the main purpose in CI is for "members of the inquiry group to change themselves. In response to a sense of personal disquiet… an individual invites others with similar interests to join an inquiry. Together, inquirers formulate a compelling question that they can answer by examining "data" from their personal experience. Their goal is to develop their own capacities, either personal or professional" (Yorks & Kasl, 2002, p. 50). While the transformative learning potential is individual, the framework is communal. And while there is a map or guide to the process, each CI may look different depending on the question, the group members and the context. This is the ambiguity that was reflected in early journal entries.

In order to lead to transformative change in practice, learning that generates new knowledge from individual and corporate experience involves "double-loop learning" (Argyris & Schon, 1974 as cited in Yorks, 2005). Individuals question fundamental assumptions and principles that guide actions and inform interpretation or framing of a situation (1974). "Double-loop learning" forces an individual to re-frame his or her assumptions and underlying point of view and habit of mind that help to interpret life experience (Mezirow, 2000). The process in itself can be disorienting as it fosters movement towards change. For some, the beginnings of this were interrupted by a lack of time, raising the tensions of desire, potential and challenge of fully implementing a process to completion.

Time, Place and Connection through Multiple Ways of Knowing

Grace: Setting was essential to the organic and democratic nature of our sessions. We met in "living rooms," which enhanced trust building and encouraged intimacy. KJ underscored after Session 2, "*the importance of place*" (italics hers). The conference call for many was an alienating experience, because there was lack of presence and togetherness. It even compelled one group member, IA, to explore his own learning style. In contrast, after Session 3, MLW remarked that what helped the group congeal and grow "one step closer – to each other and to figuring out what CI looks like for us" was "eating and laughing around the dinner table, sharing our objects and reflections, revisiting norms and expectations, and praying together." SL, who joined the same session over Skype, commented that he had "missed out on some bonding time that happened at the dinner table."

IA recalled memories of his childhood after Session 4, as he stood in awe of the renovation that KJ's family and friends had poured into their home. "Unless the Lord builds the house, they labor in vain who build it." He remembered the men, women and children of his village in Nigeria who helped his father build their house. He also appreciated "the foods from different parts of the world," and "the opportunity to fellowship in other people's private sanctuary," which seemed to contribute in his mind to the "overwhelming, enthusiastic and rich discussion" and "an opportunity of a life time."

The diversity in our group was bridged by interactions such as sharing dinner and laughter, walking to the subway together before and after sessions, and engaging in activities like the one SL introduced in Session 4, a picture card activity that JD "was really impacted by" leading to a "turning point in helping me to know that I can do all things through Christ's strength." In Session 3, AB shared a quote from a book she was reading to emphasize "we were made for relationship and community." In IA's words, "one tree cannot be a forest." IA reflected on the "spiral notebook" metaphor AB shared in the same session, a reminder of the novel "Things Fall Apart" and how the center could not always hold.

Maria: Yorks (2005) suggests that the quality and potential of experiences of critical reflection, dialogue and thinking around data and tacit experience in collaborative inquiry are dependent on the nature of the space itself (time provided, supports built in, etc.). Because the context changes the relationship among participants – doing research *with* people rather than *on* or *about* them, there are tensions and dilemmas, which have been documented in the literature (Cherns, 1975; Whyte, 1992; Deutsch, 1968; Seashore, 1976 as cited in Yorks, 2005). Thus paying attention to the design, support and environment for collaborative inquiry is critical.

Following Heron's (1992) "theory of personhood" that accounts for thinking, feeling and acting, Yorks and Kasl (2002) describe transformative learning as a change in *habit of being (*rather than *habit of mind)*, characterized by a holistic relationship to the world experienced via coherence among multiple ways of knowing (Yorks & Kasl, 2002). Heron's "extended epistemology" (1992) involves four interdependent modes of psyche – affective, imaginal, conceptual and practical – that relate to each other in an upward hierarchy, drawing from and being dependent on that what is beneath. The four ways of knowing, stacked in a pyramid and "parented" by the modes of psyche, are experiential, presentational, propositional and practical, with the base of all knowing as experiential. Validity, or coherence amongst the four ways of knowing, is monitored by developing the capacity for *critical subjectivity* – awareness of the ways of knowing and how they interact and change to articulate a reality that is not clouded by undisciplined subjectivity (Heron & Reason, 1997 in Kasl & Yorks, 2012).

Presentational knowing is seen as a "pathway" between being in the world (experience) and reflecting on it (proposition), bridging the *paradox of diversity.* Potential for transformative learning to occur increases with diversity amongst people, because differences provide challenge to taken-for-granted worldviews. However, with increase in diversity, the likelihood of empathetic space decreases. Expression in *presentational* ways allows tacit

knowledge to come to the fore, enhancing communication of lived experience, and aiding in epistemological coherence on intrapersonal, interpersonal and collective levels (Kasl & Yorks, 2012). The use of presentational knowing – metaphor, idiom, visual art – did indeed help us find common ground in the CI.

Faith and Spirituality

Grace: Faith shaped the particular contours of our journey together. At the outset, AB wrote that her interest in delving deeper into the idea of "creating knowledge" stemmed directly from her biblical understanding of what constitutes knowledge.   She interpreted Colossians 1:9-10 to speak of a holistic knowledge that echoed Heron's multiple ways of knowing. JD wrote, "Faith + CI = Great things." MLW also pointed to the purpose of our CI, "taking quite seriously the working out of the practices of thinking and living in a Christian way together and apart."

Prayer seemed to be the *sin qua non* of helping the group to listen well to God and to one another. After Session 4, AB noted that she was "thankful in particular for the time to pray together and for one another." JD reflected in his journal "how important it is for a Christian learning community to come together to break bread, reflect Christ and pray for one another." GM was so moved that she wrote down AB's prayer, "We are here to honor one another and welcome others with that which we have been welcomed with, so that we might understand more deeply your welcome." That same night, GM picked a picture of a card of a glass of wine, which captured for her the Spirit's activity in our lives, "sparkling, bubbling, . . . filling our cups and inviting all to play." At the journey's end, MLW appreciated the ability "to continue to walk alongside my brothers and sisters in a spirit of mutuality. IA expressed gratitude to God: "We shall render thanks to the Lord" (Ps 116:12).

Maria: Throughout the process, we paid attention to the presence of spirituality, defined as related to an individual's personal belief and experience of a higher power or purpose (Tisdell, 2000). Inherent in relationship and experience (Dirkx, 1997), it impacted our learning as a spiral process of moving away from and remembering earlier understandings in new contexts (Bateson 1995 in Tisdell, 2000; Tisdell, 2003).

Tisdell (2003) suggests four factors that can foster transformative learning. These are 1) cross-cultural relationships that allow for exposure to varied ways of thinking and being in the world; 2) spiritual and cultural grounding on the part of educators in order to be and encourage authenticity in students; 3) contextualized, community-based, and culturally-relevant settings in which educators are free to utilize different experiences and modalities to access spirituality in their learning process; and 4) an environment that allows for exploration on various levels including the symbolic, relational, affective and cognitive (2003). These particular factors were very much present in the cross currents of our experience.

Experiential Session

Building on themes examined above, this session invites participants to examine their own perspectives on transitions and spaces in learning through individual and group experiences. Incorporating multiple ways of knowing and spirituality (Heron, 1992; Tisdell, 2003), the session begins with an introduction to collaborative inquiry through images and video. Then, participants engage in activities exploring reflexive praxis in community, including possibly use of visual arts materials, found objects for musical composition, magnetic word poetry, and chairs to create physical patterns to represent individual and shared experiences. The session concludes with large group reflection.

Conclusion and Recommendations

What began with some uncertainty and curiosity ended all too quickly in our fifth session, with all participants wanting more. However, the tension lies in creating sufficient time and space for reflection in community. In a busy urban context, individuals juggle multiple roles; how often is there space set aside for reflexive praxis? While many agreed it was an essential practice and ideally would do it regularly for a longer period of time, though less frequently, half the group admitted that they could only commit to a reunion in six months. This begs the question, what is the minimum number of sessions for a quality CI experience? The reality of work and ministry pressures, family responsibilities, and other such things challenged the fragility of the power of our CI. We were just beginning to engage deeply and our time was up.

As initiators of the CI process, we (faculty members) chose early on to facilitate the process only so far as we could engage the group to co-lead the inquiry. As representatives of the institution they had just graduated from, it was difficult at times to counter the implicit positionality belying our presence in the group. While everyone took turns facilitating each session, there was a wait period on journal posting at times, possibly looking for a model to do it the "right way." We also tried not to insert a personal agenda into the process, but hold back and let the group lead the way (Alcantara, Hayes & Yorks, 2009).

Collaborative inquiry as a tool for adult learning and research has proven powerful here and in other contexts (Bray et al., 2000; Diversity Divas[1], 2012). Our experience is that while CI has the potential to support individuals in the context of transition in learning, particularly in complex settings where the capacity for flexibility is a necessity, *attention must be paid to the construction of the community experience, in terms of timing, context, and readiness of individuals, as well as broadening the scope of interactions and incorporating multiple ways of knowing and spirituality to open the door to greater authenticity and openness to change*. "Getting in the muck is important" but difficult at times, and there *must be enough time, space and resources to follow through with the process* (Alcantara et al., 2009, p.254). Perhaps the most valuable lesson learned is that continually assessing the impact of assumptions, values and actions on the group and institution is a way to deal with such challenges involved (2009).

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[1] "Diversity Divas" is the name of a collaborative inquiry research group adopted for the purposes of group publication. Members of the group include Maria Liu Wong, Naya Mondo, Ramona Sharpe, Aimee Tiu-Wu, Connie Watson and Rosie Williams.

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Shared Dynamics of Learning: Using a Common Framework to Construct Individual Models of Learning

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Abstract

From Dewey to Kolb to Mezirow, models of adult learning theory have been developed, revised and integrated for over a century. Yet, is it possible that within this variation and diversity, there lies a set of essential elements? Across these models, are there common dynamics of learning at play? With particular emphasis on experiential and transformative learning theory, the session will present a learning framework and invite participants to utilize the framework to analyze their own experiential learning. Through creative visualization and pattern identification, participants will examine common learning dynamics across individual experiences.

Introduction

In the diary of his summer in the California Central Valley, John Muir (1911), founder of the Sierra Club, articulates the principle of connectedness in the following words:

> When we try to pick out anything by itself, we find it hitched to everything else in the universe…Nature as a poet, an enthusiastic workingman, becomes more and more visible the farther and higher we go; for the mountains are fountains – beginning place, however related to sources beyond mortal ken. (p. 211)

Through Muir, we are called to imagine aspects of connection – of commonality. This paper uses Muir's words as a catalyst for an examination of the connections between experiential learning and the universality of experiential learning theory. Shifting to adult learning theory, how might various epistemologies of experiential learning be "hitched" together into a set of common dynamics? This paper approaches this question in four sections. To explore the meaning of experience as a foundational element in experiential learning theory, first, we discuss Usher, Bryant & Johnston's notion of experience as *raw material*. Secondly, we review prior discussions of a universal learning theory by Knowles and Mezirow, and then, present a learning framework that seeks to find commonality across difference. Lastly, we will share an overview of the reflective activity presented during the conference session.

Experience as "Raw Material"

While it is clearly explicit that experience and learning are connected through the language "experiential learning", an examination of this connection is relevant for our exploration of common dynamics. Usher, Bryant and Johnston (2002) argue that "experience is *raw*

material to be acted upon by the mind through the controlled and self-conscious use of the senses (observation) and the application of reason (reflection)" (p. 86). Considering this argument, we can see that if experience is the raw material of learning, it becomes the core element of learning. This view of experience as raw material is an epistemology core to much of our practice and rests upon an ontological view that experience is a *viable* material for learning. In other words, experience is real enough to be connected to learning – it exists. As such, we can insert it, deconstruct it, combine it and examine it in a different ways. It is in this epistemological variation that we produce "experience in a very particular way and with a very particular set of significations" (Usher et al., 2002, p. 86).

Therefore, how we look at experience guides how we look at learning. This notion of raw material conjures biodiversity principles where what is held as similar outweighs what is held as distinct. For example, National Coalition for Health Professional Education in Genetics (2012) explains that "when averaged over the entire genome, about 85 to 90 percent of the genetic diversity present in the human species can be found in any human group…The fact that any two humans are approximately 99.9 percent identical at the DNA sequence level indicates that we are genetically quite similar to one another." Along with other common raw materials of life, such as water, carbon and oxygen, we are reminded through various aspects of our existence that there are dominant elements at the foundation of life. The same could be true of experience. This notion of finding a universal learning theory is not new. We will explore this idea through the lens of Knowles and Mezirow.

Universal Adult Learning Theory

Andragogy and Knowles' six assumptions have been interpreted as an early move towards the development of a universal adult learning theory. He sought to find a set of learning characteristics or core principles that could be applied to any learning interaction between learner and educator. Yet, contemporary critiques highlighted prioritization of Western individualistic ideology. Ultimately, these critiques shifted the interpretation of Knowles' ideas from learning theory to learning approach. As such, andragogy can be employed in adult learning settings when appropriate, without educators assuming its place as a cornerstone of adult learning practice. Mezirow's move toward universality examines the process of constructing new interpretations of the meaning of experience for the goal of personal autonomy and independence. Some (Collard & Law, 1989; Hart, 1990) interpreted the universality that emerges in some of Mezirow's writing as essentializing the "individual" and its freedom to construct reality independent of social structures. Similar to Knowles, Mezirow finds himself facing critique about individualistic hegemony, which allows for the disconnection of knowledge construction and context and requires theoretical acrobatics to integrate team learning. For both Knowles and Mezirow, the idea of core learning principles or processes faces significant challenges.

Despite these challenges, there are common threads running through a variety of adult learning models and theories, including experiential learning, Transformative Learning Theory, and informal learning. Mezirow's theory of transformative learning has had many critics, including Newman's (2012) most recent critique. While many of these critiques are

rooted in a firm logic of their own, it is our intention to bridge experiential learning theory and Mezirow's transformative learning theory. Capturing the common notes across theory, our "critique" takes the form of a new expression of ideas. Experience as the "raw material" or catalyst for learning, often in the form of a disorienting dilemma or real-life problem, figures prominently in Mezirow's (1991) Transformative Learning Theory, as well as Marsick and Watkins' Model of Informal and Incidental Learning (Marsick, Volpe, & Watkins, 1999), and both Kolb's (1984) and Boud's (1994) conceptualization of experiential learning. Social discourse is another common element, seen by Mezirow (1991) and Boud (1994) as essential to the resolution of conflict, and by Marsick and Volpe (1999) as an enhancement to learning. Critical reflection (the process of examining previously unchallenged assumptions and subsequently revising our interpretation of the meaning of our experiences), is arguably a common goal of adult learning according to Mezirow (2000), Boud (1994), and Marsick and Volpe (1999).

Divergent elements of adult learning theories and models may involve incongruities in intention and action on the part of the learner versus the facilitator of learning. Roles of the learner and facilitator may be shared, may fluctuate, reverse, or at times the facilitator may be completely irrelevant to the learning experience. The focus of the learning experience may be oriented toward an individual cognitive process or a sociocultural context. Experiential learning, informal learning, and Transformative Learning Theory all approach learning through a constructivist lens - that is, the belief that we make our own meaning based on our experiences. Constructivism embodies the postmodern notion that knowledge can never be fully known, is subject to the perceptions of the learner, and may change based on new information or new experiences. A postmodern view of learning may seem to preclude a "universal" model, a one-size-fits-all approach. However, both convergent and divergent elements can be used to construct a flexible framework that allows for the evolution of personal stories and individual interpretations.

What makes this framework a possibility? One answer lies in the distinction between theory and framework. Unlike a theory with specific constructs guiding the learning process, a framework offers a set of inputs that can be utilized to reach an outcome. In this case, the framework provides a set of elements that individuals might use to construct, and thereby, reflect upon, a learning experience. Another answer lies in the negotiation of the common reference of experience and the subjectivity of socialized context. This framework operates under an expectation of exponential variation within a common set of elements – not unlike the biological evidence of life surrounding us. The framework introduced here, along with the accompanying learning activity, incorporate common and divergent elements of experiential learning through an analysis of a real-life "change experience." Learners will engage in a reflective activity through discourse, creating their own model by examining elements of learner and educator intent, action, and orientation.

Learning Framework

Speaking to the educator, Boud, Keogh, and Walker (1985) & Boud (1994) present a model for learning that can be used to structure and facilitate the learning process. Beginning with a three-stage model, Boud et al. added a fourth stage in later years. Therefore, we

consider all four stages: preparation, experience, reflective process and outcomes. There is a clear recognition in this model that the learner and educator are both actors in the learning process and play a role in outcomes. The cyclical process of learning rooted in prior experience – the personal foundation of experience – represents the learner's intent. The educator, also functions as a learner and operates from their own personal foundation of experience. The intent of both the learner and the educator influence outcomes and the reflective process of learning – there is an implicit relationship between intent and action. Additionally, Boud et al. acknowledge the slight role of context in the discussion of milieu and the role of the educator. However, their articulation of attention to feelings, association, integration, validation and appropriation are primarily oriented towards the individual cognitive processes - leaving sociocultural orientation outside of the model.

Unlike Boud et al., Kolb's model is learner focused and provides a prescriptive view of experiential learning describing the skills needed for effective learning. While the educator is not central to his consideration of the learning process, in educational contexts where the educator is a separate actor, their learning process likely mirrors the learner – the educator is simply a learner with a different role. His model also doesn't view learning as an outcome, but a continual process. The connection of grasping experience through apprehension and comprehension sets the "intent" and defines expectations. The connection of transforming experience through extension and intention sets the "action". Also, in contrast to Boud et al., Kolb fully embraced an individual, cognitive orientation. An extraction of essential theoretical features led to the identification of four common experiential learning elements represented in Figure 1. What follows is a generalized description of each element.
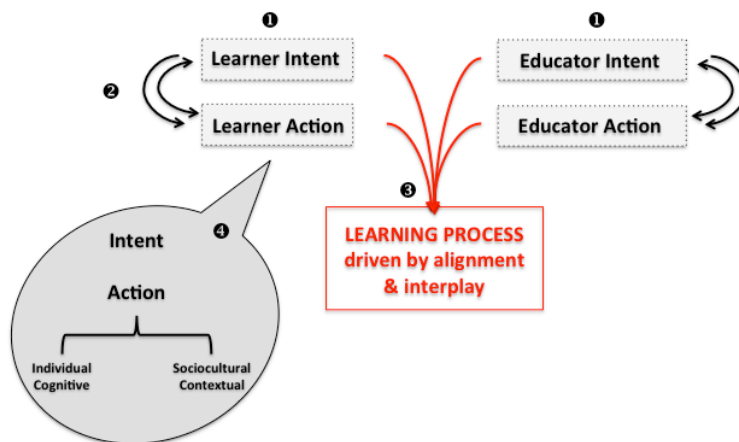
Figure 1. Learning Framework

Intent & Action: Learning from experience is composed of intention and action: Intent encompasses both intellect, expectations and desire – what do I expect to happen or think will happen based on my past experiences and what do I want to happen based on my past experiences. Action encompasses both behavior and tactics – what do I do or plan to do with my experiences. While the language varies, these basic components operate across several theories. Intent and action can be relevant to two actors – the learner and the

educator. While the learner is central and in certain theories is the sole actor, the educator may play a critical role to the learning process. In other words, experiential learning has solitary aspects for the learner and/or interactive aspects between a learner and an educator. While all experiential learning theories begin with the assumption that learning and experience are inextricable, the movement from experience to learning is the space where individual theories operate. It is in this space between experience and learning where theories share views and differ. Acknowledging that there are various manifestations of intent, it nonetheless becomes a component of the experiential learning process in several theories. Action also emerges as a component of the experiential learning process – what will we do with our experiences? Experiential learning theory (ELT) seems to take various perspectives on the actions taken after experience, but action must be taken – that component cuts across ELT.

Relationship: Intersections and junctions exist between intent and action; Action stems from intent: While it may seem obvious, the connection between intent and action must be called out as a distinct element of ELT. These two modes of experience connect in different ways across theories, but they do connect. What the learner does with experience (action) will stem from how they came into that experience (intent). The working through and working toward experience (Fenwick, 2000) entails various formulations of the intersection and junction of intent and action. It seems that certain theories might view this as unidirectional relationship, where intent shapes action, such that intent is a more cognitive process in the experience and drives a set of actions. In this formulation experience and the learning process might be seen as distinct and non-contextualized. Others may view it as a cyclical relationship, where intent and action shape each other, such that there is an exchange based on situation and context.

Learning Process: The interplay of learner intent (LI), learner action (LA), educator intent (EI) and/or educator action (EA) drives the learning process: With intent and action components in place and recognizing the interaction between the two, the substance of ELT seems to reside in the learning process itself. As Fenwick (2000) articulates, ELT theorizes an "intersection between situation, educator and subject whose position is designated *learner*". Every learning process may not involve learner and educator as separate actors, but when both are involved, the process is defined by the interplay of their collective intents and actions. There is an assumption that educators can enhance the learning process particularly when their knowledge of the learner's intent is clear and they possess a direction of action. In the solitary learning process, the learner's intent and action drive the learning process.

Orientation: Prioritization of individual cognitive orientation or sociocultural contextual orientation: Surrounding all theory is a paradigmic orientation towards the individual or the individual in context. While likely conceived more as a continuum instead of a choice, certain theories seem to prioritize one orientation over the other. For example, Dewey and Lewin seem to prioritize an individual cognitive orientation in the experiential learning process. Jarvis and Weil & McGill seem to prioritize sociocultural orientation. Boud and Kolb seem to acknowledge aspects of both orientations (while prioritizing individual cognition).

Our quest is to reveal how everything is interconnected. From the atom to the cell, to the body and beyond into society and the cosmos, there are underlying processes, structures and rhythms that are mirrored all around and permeate reality. We attempt to visualize 'the molecular process of revolution'; how one small thing leads to another and larger patterns emerge…Ultimately we are trying to present a view of reality that reflects our changing times. This work embraces the multiple, the network, the paradoxical and the idea that even the smallest gesture or event has significance, and the power to change everything (Molloy, 2006)

As in Molloy's artistic work, the session's reflective activity creates a discursive space to analyze experiences and demonstrate individual presentational expressions of experience. After presenting the learning framework, participants are able to apply their individual context using the common dynamics relevant to their experience. Specifically, the framework considers four learning dynamics: (1) Agents, (2) Intention, (3) Action and (4) Orientation. Participants will be asked to identify a past or current experience of change – change in their behavior or thinking about someone or something. Organized into dyads, they will briefly share their change experience. Beginning with one of the experiences, the group will use discussion and reflection to construct a model representing the dynamics of the experience using the set of materials given to them. Thereby, creating an "individual model of learning".

The materials will include a set of colored adhesive labels for each element of the framework, a set of adhesive uni-directional and bi-directional arrows, a sheet of flip chart paper and pen. Each label will state the element of the framework and a question for reflection about that element. Table 1 describes activity label text and framework linkages.

Front Side of the Card	Back Side of the Card
CHANGE EXPERIENCE	Briefly describe the change experience.
MY PAST	What past experiences influenced you throughout the change experience?
Connection to Framework: Sociocultural Contextual	
MY CULTURE	What societal, cultural or situational factors influenced you throughout the change experience?
Connection to Framework: Sociocultural Contextual	
INTENT of RELEVANT OTHERS	Thinking of others involved in the change experience, describe your view of their intention.
Connection to Framework: Educator Intent	
ACTIONS of RELEVANT OTHERS	Thinking of others involved in the change experience, describe your view of their actions.

Connection to Framework: Educator Action	
MY INTENT	Describe your intention. What did you hope for?
Connection to Framework: Learner Intent	
MY ACTIONS before the Change Experience	Describe things you did or were doing before the change experience.
Connection to Framework: Learner Action	
MY ACTIONS during/after the Change Experience	Describe things you did or were doing during or after the change experience.
Connection to Framework: Learner Action	
MY NEW THINKING	Describe new thinking you have about your change experience.
Connection to Framework: Individual Cognitive	
WILD CARD	Blank card to use for any purpose

Table 1. Activity Label Text and Framework Links

Using the selected change experience, they will decide which elements of the framework apply. Working together, the dyad will arrange the cards and the arrows to capture the dynamics of the each other's learning experience. They can use the questions on each label as a reflective guide for a more in-depth discussion of the experience and write notes/comments as needed. When the design is complete, the pair will conclude the discussion of each experience by removing the adhesive and sticking their model to the flip chart paper. Following their dyad discussion, participants will be invited to take a silent "walking tour" around the room to see the models from other groups. Figure 2 displays examples of two individual models of learning from the activity using the common elements.
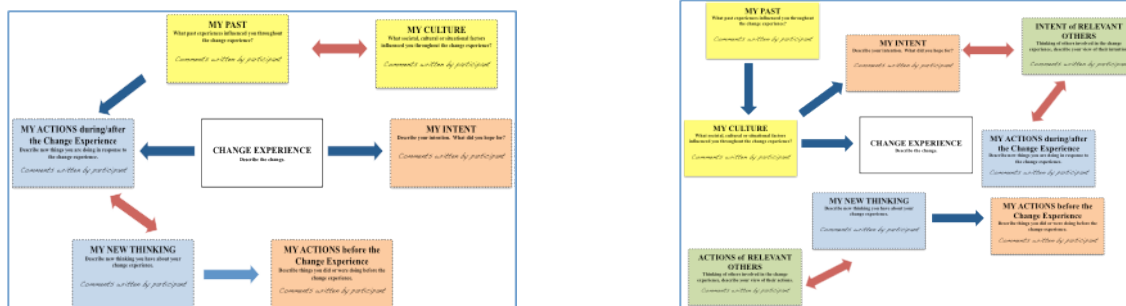
Figure 2. Examples of Participant "Individual Models of Learning"
As you can see, each part of the framework is <u>not</u> used in both examples because each part isn't relevant for each individual. Following the tour, all participants will be invited to

share their observations with particular emphasis on the application to transformative learning facilitation. Through this framework and accompanying activity, we seek to acknowledge and embrace the power of reflection rooted in individual experience, examined through collaborative engagement and, using Muir's words, "hitched" together with the same building blocks. As artists of all kinds already know, while we may begin with the same notes, the same tools, the same colors or the same materials, we end with something infinitely dynamic – an expression of our evolving selves.

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Teaching Transformation in High School: Appreciating What Works

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Abstract
New Leaf: A Sustainable Living Collaborative is an alternative, high school, diploma program in Martinez Unified School District that targets "at- risk" high school youth. The program employs a unique blend of place-based, experiential pedagogies embedded within a participatory paradigm of learning. Transformative learning theory and reflective discourse is utilized as students move through the interdisciplinary program, which is geared toward fostering sustainable ecology, psychology, relationships and learning. The essential transformative conditions are reviewed and examples of applications are offered.

Introduction to New Leaf: A Sustainable Living Collaborative
"The world asks that we focus less on how we can coerce something to make it conform to our designs and focus more on how we can engage with one another, how we can enter into the experience and then notice what comes forth. It asks us to participate more than plan." - *A Simpler Way* by Wheatley & Kellner-Rogers

Life in New Leaf is different than in most high schools. Each day begins in a small, learning community and sitting in a circle. Someone volunteers to quiet the group and lead a meditation or breathing practice. Soon thereafter, the essential question of the day is explored through written reflection and dialogue. Connections are made between ideas discovered in previous experience. Afterward, the hustle and bustle of the day begins with an hour of math exercises. By 10 am, students switch teachers to explore the remainder of the day through themed workshops and hands-on projects. One day a week is devoted to nurturing holistic health in everyone. Students learn yoga, stress management techniques and strategies to increase emotional intelligence. Three days per week are devoted to place-based learning projects that are connected with core curricular goals and community-focused service. An additional day is devoted to leadership and communication skill development. Career-focused individual and team-based internships, as well as volunteer work are offered throughout the school day, after school, and on weekends.

Our classroom includes the entire community and our local landscape. Students are members of a cohort made up of students from all high school grades. Each cohort is guided by one teacher, who works to individualize the learning for each student based upon their learning styles. All students work in teams developing leadership skills using the archetypal hero's journey as a guide. Teachers work in partnership with each other and professionals in the community to offer experiential learning opportunities to build intergenerational relationships. Our school schedule is flexible depending on needs of the service projects that are integrated into the core, standards-based curriculum. Professional mentors work alongside students weekly providing hands-on, service-learning, career-focused training. Adventure and wilderness appreciation is integrated into the core curriculum. Students spent time outdoors each week in every season.

New Leaf: A Sustainable Living Collaborative is a program offered at Vicente Martinez High School in Martinez Unified School District. Vicente is a continuation school that attracts students who have struggled to achieve in the traditional high school environment. Students voluntarily attend New Leaf as a career-focused pathway to achieve a high school diploma. The program curriculum is experiential in nature and is organized around the ecological principles of Sustainable Education (Sterling, 2001) and Partnership Education (Eisler, 2000). The curriculum utilizes the strategies and practices of (a) place-based learning (Sobel, 2004); (b) ecological service-learning (Sterling, 2000, 2001); (c) intergenerational mentoring (Colley, 2003); (d) a rites of passage curriculum (Delaney, 1995; Lertzman, 2002); (e) transformative learning theory (Mezirow et al., 2000), and (f) experiential learning theory (Association for Experiential Education, 2008) all done through participation in a small learning community (Mezirow et al., 2000). Students participate in hands-on, community-based real-life projects as apart of their regular school day.

New Leaf has evolved over the last 10 years from the basic foundational principles of transformative learning theory. This paper will review the application of those principles in this particular high school setting.

Larger Educational Context

"The way we teach depends on the way we think people know; we cannot amend our pedagogy until our epistemology is transformed. If teaching is reformed in our time…it will happen because we are in the midst of a far-reaching intellectual and spiritual revisioning of reality and how we know it" –*To Know as We are Know* by Parker Palmer

Most high school teachers today struggle to adapt traditional teaching pedagogy to fit a new century of educational ideals. Studies show that as many as 65% of all high school students across urban, suburban and rural boundaries are bored and unexcited about their classes (Melaville, Berg, & Blank, 2006). Due to the changing social, economic, and environment world, each year one third of all students who enter U.S. public high schools drop out. In inner cities, only 50% of students graduate with a high school diploma (Thornburgh, 2006). Today, most U.S. dropouts leave by the time they enter tenth grade (Barton, 2005; Bridgeland et al., 2006; Pittman, 2005). Martin and Halperin (2006) explored these statistics. They state that in the United States a student drops out of high school every six seconds. The top reasons students give for dropping out of school include their involvement in high-risk behaviors (i.e., drugs, alcohol, sexual activity, or theft) or feeling unsafe at school. However, the most popular reason given for dropping out of high school is being bored in classes in which the students fail to see any relevance to their lives (Bridgeland et al., 2006). This research supports the U.S. media's portrayal of the staggering dropout epidemic, but there is more to the story.

Typically schooling happens inside a classroom surrounded by walls, abstract ideas and is limited to content provided by books and computers. When young people spend less time outdoors, at the very least, they are limited in their contact with the natural world. To compound this issue, studies have also shown that a lack of time outdoors can be the cause of many health issues such as obesity, diabetes, depression, Attention Deficit Disorder and stress related illnesses (Taylor & Kuo, 2006; Wells & Evans, 2003). More importantly, when children spend most of their free time entertained by multimedia technology they have less time for unstructured play which limits important emotional and cognitive development (Burdette & Whitacker 2005; Louv, 2005; Taylor et al., 2001; Wells, 2000). Consequently, the attention span of younger students is diminishing and students are becoming less tolerant and therefore less engaged.

To address these issues, New Leaf pedagogy is founded on relationship building practices where meaning making happens with every interaction, every experience and in every context.

New Leaf Pedagogy

"This more holistic or systemic approach helps young people develop both cognitive (intellectual) intelligence and emotional (affective) intelligence. Most important, it enables them to better navigate through our difficult times and to better understand, and begin to lay, the structural foundations for a world where both humans and Mother Nature are truly valued." -*Tomorrow's Children* by Riane Eisler

The art of teaching is intrinsically linked to the process of bearing witness to what matters in a culture. Teachers serve as catalysts calling for more active engagement in learning. Teaching is about the cultivation of relationality, the interconnectedness that links a life-giving system. In New Leaf, every participant is a teacher, everyone is a learner, and everyone has the ability to contribute in real and profound ways that make the world a healthier place to be. In order to make this possible, we practice educational strategies that (a) evoke personal authenticity in learning, (b) allow emergent knowledge to surface and guide, (c) stimulate the subtleties of differences while being nonreactive in unknown chaotic spaces, and (d) help think about learning and the world from a systems perspective (Ross, Zammit, & Zollinger, 2005). These strategies are implemented within the classroom through appreciative, cooperative and organic inquiry methodologies in ways that invite multiple ways-of-knowing, allowing for the whole self to be present and nurture human flourishing.

The New Leaf learning experience is created as a system of interrelated relationships that focuses first on the cultivation of personal reflection and self-awareness. See Figure 1. This primary relationship serves as a foundation from where all learning evolves. Personal action is rooted in an understanding of one's own learning styles, personality, and personal paradigms of thought. In addition, students explore processes of transformation outlined through Joseph Campbell's Heroes Journey (Campbell, 1949). Upon personal groundwork students explore

(through workshops, service-projects and leadership training), their relationships with and concerns about family, community and environment, including, including an exploration of historical and current paradigms of thought.

Meaning is made through a series of teacher facilitated action and reflection cycles that bring focus to each of the 4 learning domains portrayed in Figure 1, which are self, family, community and then environment. In New Leaf, the classroom becomes a place of integration, where life's lessons are connected to purposeful, personal growth and the next learning action is connected to the emerging knowledge of the individual and then the learning community. This process of learning not only sustains genuine student engagement, but contributes to community and environmental flourishing as well.

Figure 1 New Leaf Learning Domains

Self
Family
Community
Environment
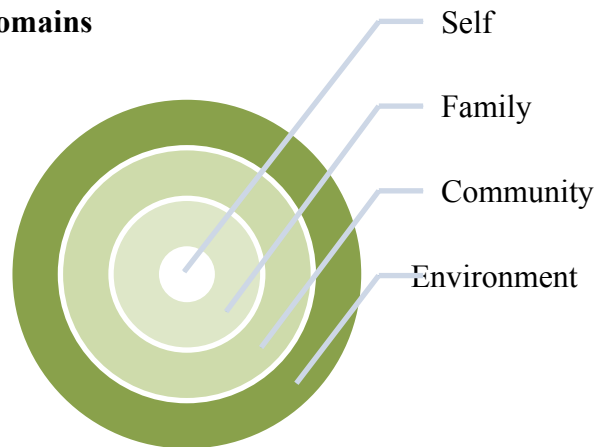
Conditions for Transformation

"To educate as the practice of freedom is a way of teaching that anyone can learn."
–Teaching to Transgress by Bell Hooks

New Leaf pedagogy is rooted within a context that strives for personal and communal transformation. The program's vision seeks to create agents of change who understand how to work in partnership with others to cultivate (a) wholeness in individuals, (b) connections within communities, and (c) the restoration of ecological sustainability. The 4 New Leaf learning domains are integrally linked with 10 conditions that are essential to establishment of this transformative learning culture. These conditions include: (1) development of relational values; (2) practice of acceptance and diversity; (3) focus upon personal and community health; (4) creation of a system of mutual accountability; (5) allowance of emergent learning to guide inquiry; (6) establishment of consistent, intergenerational relationships; (7) direct teaching of critical thinking; (8) application of learning to measureable social action; (9) facilitation of inspirational appreciation; and (10) direct attention to processes of renewal (Zollinger, 2010). These 10 conditions must not be seen as isolated practices, but as a network of focuses, practices and strategies used to create a common community culture of transformation. These 10 conditions were identified by stakeholders in the author's dissertation research. When these conditions are integrated in a functioning learning community, something beyond the individual happens. A field of transformation is cultivated and a larger pattern of discovery emerges that is more alive and more interconnected than within traditional, teacher-focused classrooms. This transformative field is a place where all people can be supported to succeed.

The following is a short description of each of the transformation conditions:

1. Relational Values: Creation of a homelike classroom environment with small learning community principles that encourage a strong sense of connection. Values are deliberately discussed and nurtured. Groups sit in circles as a regular part of the school day.

2. Acceptance And Diversity: Processes that break down fears and/or barriers between people and communities are regularly facilitated, such as trust building exercises and team-building experiences.

3. Personal and Community Health: Facilitation of stress management techniques are a part of core community daily rituals, nature-focused connective activities and the practice of celebrating and eating together are regularly experienced.

4. Mutual Accountability: Program functions as a team-based organization, with the teacher's primary role being that of a facilitator. Students are invited to teach as often as they are taught and have choice regarding their participation and role in almost every educational experience. Students regularly present their work to other student groups, funding agencies and partnering organizations.

5. Emergent Learning: Attention is placed on new learning as it is created and it is used as a guide for the next curricular exploration. Facilitators pay attention to the transdisciplinary nature of the inquiry, as well as synergistic interests that develop between traditionally separated content areas. Cohorts are composed of mixed-age students who learn to mentor peers as they progress through a developed, organized and facilitated leadership program. The school day is flexible enough to adapted to yearly projects and emergent learning.

6. Purposeful, Intergenerational Relationships: Consistent and mutually beneficial, intergenerational, relationships between students and adult community members are facilitated through purposeful, community-focused, service-learning projects. Students have one primary teacher relationship that stays consistent over the course of their enrollment.

7. Critical Thinking: Teaching curriculum and strategies identified to be foundational include (a) Partnership Education curriculum; (b) systems theory and holistic approach to content; (c) facilitation of transformative learning cycles of reflection and action; and (d) consciously created rites of passage experiences for students.

8. Social Action: Action-oriented projects including (a) place-based learning practices; (b) experiential learning methods; (c) hands-on, issue-based, real-life, service-learning projects (issues addressed are identified by students and the community simultaneously); and (d) environmentally-focused outdoor activities.

9. Inspirational Appreciation: Students inspire each other, stakeholders and the public through public demonstrations of student projects, group appreciation circles and yearly program evaluation using Appreciative Inquiry research cycles. Regular activities that focus on appreciating all participants are also fundamental.

10. Renewal: Attention to the energy of seasons, personal emotions, feelings of burn-out and exhaustion are openly discussed. Activities that promote balance and the cultivation of harmony and joy are embedded within the schedule. Sustainability is a focus for not only for the projects, but for the health of the people and the program.
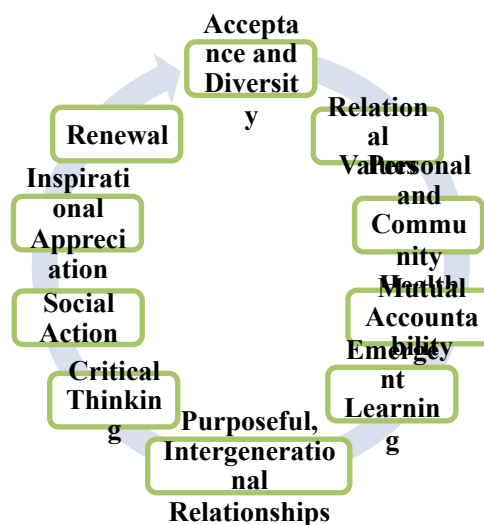
An Afternoon in New Leaf

"Participants walk away with a sense of commitment, confidence and affirmation that they have been successful. They also know clearly how to make more moments of success." -*Appreciative Inquiry* by Sue Hammond

Facilitating transformation is about paying attention to the learning moments that emerge and about creating the conditions where communities can support each other's learning. Below you will find a selection of student testimonials describing their experiences in New Leaf:

- "I was in the process of dropping out of high school, when one of my friends inspired me to join the program. I had lost the passion for learning and I didn't know where I had lost it. I couldn't find it. He brought me there one day and it changed my whole out look on school and how it could be taught. Everyone learns from each other and it was the best experience I had ever had, just on the first day. I ended up graduating from the program and giving a speech at graduation. I even won a $1000 scholarship. It really inspired me to make healthier choices in my life and it really gives you a rite of passage and takes you to the next level of life. Now I feel like a steward of the land and I know how we can make it better."

- "If I had one day that represented my progression during the year, I would definitely choose the day I led a group of select fifth graders from the elementary school on a hike through our Sky Ranch Restoration Project. The single best opportunity I grasped was the chance to take the children off of their facility and let them smell, taste, and hear the wonders of wild nature. It was great to teach with experiential education. I t is great to learn through experience, because experience is the purest medium of knowledge. Being a student in this school causes me to gain appreciation for the moment, and I am nothing short of pleased. If I could give everyone or anyone the opportunity to partake in such a wonderful experience, I would do so without the slightest hesitation."

- "The word Captive comes to mind when I think of traditional school. I would go to school everyday and do the same curriculum. Day in and day out we would do the same things. It got so old. I had a lot of problems, substance abuse problems and problems at home. Since I have been in this program a new word comes to mind and that is "Captivate." I feel that this program has given me so much and I have only been in it for 4 months. It has changed me in so many ways – spiritually, intellectually. It has changed my life and I am so grateful for being in the program. Everyone here is not only my friends now, but also my family. It is just so amazing. I am a different person now." It is moments like these that remind us that teaching is as much about learning and learning can be the approach of every moment.

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