Articles

FOSTERING MEZIROW'S TRANSFORMATIVE LEARNING THEORY IN THE ADULT EDUCATION CLASSROOM: A CRITICAL REVIEW

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Abstract

This critical review builds upon the theoretical and practical debate of Mezirow's transformative learning theory by investigating what 23 empirical studies reveal about the practice of fostering transformative learning in the classroom. The review finds much support for Mezirow's ideals for promoting rational discourse and critical reflection. Findings point to the importance of fostering group ownership and individual agency, providing intense shared experiential activities, capitalizing on the interrelationship of critical reflection and affective learning, developing an awareness of personal and social contextual influences, promoting value-laden course content, and the need for time—all of which reveal a complex and challenging form of teaching. Future research needs to focus on the more subjective elements of fostering transformative learning, such as the role of relationships, how emotions are managed in the classroom to promote critical reflection, and the impact of fostering transformative learning on learning outcomes.

Résumé

Prenant appui sur 23 études empiriques, cet examen critique des écrits s'intéresse aux aspects tant théoriques que pratiques du débat qui concerne la théorie de l'apprentissage transformatif «transformative learning» de Mezirow. Cette recension vient appuyer l'idéal de Mezirow en matière de discours rationnel et de réflexion critique. En effet, les résultats indiquent qu'il est important de mettre l'accent sur l'appartenance au groupe et sur l'initiative individuelle, de favoriser la mise en commun d'activités axées sur l'expérience, de prendre en compte les interrelations entre la pensée critique et les aspects plus affectifs de l'apprentissage, de développer une conscience des

influences personnelles et de celles liées au contexte, de promouvoir des contenus de cours faisant la promotion de certaines valeurs et d'accorder le temps nécessaire à la réflexion. Ce qui précède constitue un défi invitant à penser l'enseignement d'une manière nouvelle et complexe. Les futures recherches auront à se pencher sur les éléments plus subjectifs associés au développement de l'apprentissage transformatif tels que le rôle des relations, la manière de prendre en compte les émotions dans le développement de la réflexion critique et l'impact de l'encouragement de l'apprentissage transformatif sur les résultats de l'apprentissage.

No recent body of research in the field of adult education has been given more attention in the pursuit of understanding adult learning than the study of transformative learning theory. Transformative learning theory is uniquely adult, abstract, idealized, and grounded in the nature of human communication. It seeks to explain how adults' expectations, framed within cultural assumptions and presuppositions, directly influence the meaning individuals derive from their experience. Since the original research by Jack Mezirow (1978) over 20 years ago that studied women returning to school after a long hiatus, numerous investigations and theoretical critiques have been undertaken to explore transformative learning in relationship to community and social transformation, power, intercultural learning, critical reflection, whole person learning, and career change, just to mention a few (see E. W. Taylor, 1997, 1998). In addition to the empirical and theoretical discussion, a growing body of instructional literature offers practitioners who work in a variety of adult and higher education settings innovative methods and techniques for fostering transformative learning in the classroom (e.g., Anderson & Saavedra, 1995; Cranton, 1994, 1995, 1997; Fulton, Licklider, & Schnelker, 1997; Jamieson, Kajs, & Agee, 1996; Laiken, 1997; Mezirow, 1990, 1991, 1995, 1997; Nabben, 1995; Robertson, 1997).

Fostering transformative learning is a practice of education that is "predicated on the idea that students are seriously challenged to assess their value system and worldview and are subsequently changed by the experience" (Quinnan, 1997, p. 42). However, despite the continued interest in transformative learning theory, little is known about how it actually looks in practice from an empirical perspective. My earlier, extensive review of the research on transformative learning revealed that "concepts of promoting and fostering transformative learning are the least empirically investigated" (E.

W. Taylor, 1997, p. 38). Only five studies were identified in this review that directly informed the practice of fostering transformative learning in a typical classroom setting. In a subsequent paper (E. W. Taylor, 1998) I confirmed this same pattern of a lack of research and identified the need for researchers and adult educators to explore "the practicality of Mezirow's ideal conditions for learning in a typical classroom setting" (p. 61).

In essence, adult educators are being encouraged to promote a form of teaching from an array of instructional text with little understanding and/or evidence of what the educational implications and outcomes are for their students. Questions need to be addressed about what is required of those who want to promote learning as transformative, such as: What are the essential methods to precipitate a change in perspective in the classroom? What are the responsibilities and risk? What is the role of the students and teacher in the transformative experience? How do transformative practices influence learning outcomes? In essence, how does fostering transformative learning inform the practice of teaching adults? Therefore, in this article I review the practice of fostering Mezirow's transformative learning from an empirical perspective and discuss the implications it has for teaching adults.

A Framework for this Literature Review

The framework for addressing the purpose of this review involves a brief synopsis of transformative learning theory from Mezirow's perspective, a discussion of how the studies were selected an analyzed, and a presentation of significant findings, followed by a discussion and related implications for the fostering of transformative learning and field of adult education in general. Also, it is important to note at the beginning of this review that there are other conceptions of transformative education (e.g., Freire, Horton, Shor, Belenky) besides transformative learning theory that were not included in this review. These emancipatory educators conceptions vary greatly from Mezirow's conception of transformative education, not only in their theoretical assumptions about personal and social change, but there work is not rooted in an empirically grounded theory of adult learning. For this review, by utilizing a consistent lens in the selection and critique of the different studies, ensured a purposeful selection process and promoted a more valid and reliable review. Furthermore, Mezirow's transformative learning theory has become a significant part of the mainstream discourse over the last decade about the practice of educating adults.

An Overview of Mezirow's Theory

There is an innate drive among all humans to understand and to make meaning of their experiences. It is through established belief systems (a frame of reference) that as people we construct meaning of what happens in our lives. As there are no fixed truths and change is continuous, we cannot always be confident of what we know or believe (Mezirow, in press). Therefore, it becomes imperative in adulthood that we seek ways to understand better the world around us and in doing so develop a more critical worldview. As adults we need to understand "how to negotiate and act upon our own purposes, values, feelings and meanings rather than those we have uncritically assimilated from others—to gain greater control over all lives as socially responsible clear thinking decision makers" (Mezirow, in press). Developing more reliable beliefs about the world, exploring and validating their dependability, and making decisions based on an informed basis is central to the adult learning process. Transformation theory as defined by Mezirow explains this psycho-cultural process of constructing and appropriating new or revised interpretations (beliefs) of the meaning of one's experience.

Mezirow (1991) sees the goal of fostering transformative learning as helping

> learners move from a simple awareness of their experiencing to an awareness of the conditions for their experiencing (how they are perceiving, thinking, judging, feeling, acting—a reflection on process) and beyond this to an awareness of the reasons why they experience as they do and to action based upon these insights. (p. 197)

Three interrelated components are central to the process of fostering transformative learning: the centrality of experience, critical reflection, and rational discourse. The learner's experience is the starting point and the subject matter for transformative learning (Mezirow, 1995). Experience is seen as socially constructed, so that it can be deconstructed and acted upon. It is experience that provides the gist for critical reflection, the second theme. Critical reflection is the distinguishing characteristic of adult learning, which refers to questioning the integrity of assumptions and beliefs based on prior experience. It often occurs in response to an awareness of a contradiction among one's thoughts, feelings, and actions. The third theme is rational discourse, the necessary medium through which transformation is promoted and developed. However, in contrast to everyday discussions, it is used

"when we have reason to question the comprehensibility, truth, appropriateness, (in relation to norms), or authenticity (in relation to feelings) of what is being asserted or to question the credibility of the person making the statement" (Mezirow, 1991, p. 77). It is within the medium of rational discourse that experience and critical reflection come together. Discourse becomes the means by which critical reflection can be put into action, where experience is reflected upon and assumptions and beliefs are questioned, and where new or revised interpretations of experience takes place.

Mezirow (1995) believes a central activity of adult education is the fostering of transformative learning. It involves the most significant learning in adulthood, that of communicative learning. "Communicative learning involves identifying problematic ideas, values, beliefs, and feelings critically examining the assumptions upon which they are based, testing their justification through rational discourse and making decisions predicated upon the resulting consensus" (p. 58). Fostering transformative learning successfully requires the promotion of ideal conditions for rational discourse. This includes (a) establishing a sense of safety, openness, and trust; (b) having access to accurate and complete information; (c) using instructional methods that promote a student-centered approach; and (d) exploring alternative perspectives through problem-solving activities and critical reflection.

In addition to the themes that Mezirow identified, previous research as well as theoretical critiques has raised other concerns that could be of great significance to fostering transformative learning (Cunningham, 1992; Hart, 1990; Newman, 1993). From a theoretical perspective a number of issues have been identified, such as the role of power (Hart, 1990), the decontextualization of rational discourse in transformative learning (Clark & Wilson, 1992), and rational discourse's culturally universal orientation to learning (E. W. Taylor, 1998). For example, Hart argues that Mezirow implies a power-free form of communication and, by doing so, fails to recognize the inherent distorting effect of power within communication that has to be addressed for critical reflection to take' place. His failure to recognize the power relations inherent in communication with an educator contradicts the practicality of the ideal conditions Mezirow (1995) sets out for fostering rational discourse.

From an empirical perspective, my review (E. W. Taylor, 1997) of over 35 studies involving transformative learning theory identified a number of factors that could be of significance, even though only a few studies had researched the practice of fostering transformative learning in the classroom. Those factors included recognizing the lesser role for critical reflection and an increased role of affective learning, the significance of personal and social contextual factors that surround and shape the learning experience, the significance of relational knowing, and the varying nature of how transformative learning is triggered and initiated. Now that a greater number of studies are available on fostering transformative learning my objective in this review is to identify not only what new insights can be learned but, more importantly, to identify how transformative learning looks empirically when explored in context of the adult classroom experience.

Educational Settings and Methodologies in the Selected Studies

In the identification of studies on transformative learning, literature searches were conducted on several databases (e.g., ERIC, Dissertation Abstracts International) using three criteria for selecting the studies. Each of these studies had: (a) Mezirow's model of transformative learning as its theoretical framework; (b) a purpose that informed the practice of fostering transformative learning in an educational setting; and (c) a defined methodology section. In contrast, conceptual pieces were excluded. In all, 23 studies were identified (inclusive of the five reviewed by me in my 1997 article), of which 19 exist only as unpublished dissertations. Each dissertation was obtained, read in its entirety, and reviewed—as well as the original dissertation for one of the published studies—with the analysis of each study framed within Mezirow's transformative learning theory. In the next subsection I provide a brief overview of transformative learning theory and the related conditions for fostering transformative learning from Mezirow's perspective.

The 23 studies reviewed for this article examined how personal change was facilitated in a variety of educational settings. They included learning in higher education (King, 1997; Vogelsang, 1993); classes in religious studies and adult education (Bailey, 1996; Brown, 1997; Herber, 1998; James, 1997; Kamisky, 1997; Sokol, 1998); training of church members (Cusack, 1990; Johnson, 1997); technology instruction for ABE teachers (King, 1999); teacher education and nursing (Gallager, 1997; Heggie, 1998; Wilson, 1995); job, management, and leadership training (Kritskaya & Dirkx, 1999; Ludwig,

1994; Neuman, 1996; Pierce, 1986); inservice training for teachers and family life educators (Matusicky, 1982; McKinzie, 1997; Saavedra, 1995); self-help groups (Dewane, 1993); and computer-assisted rehabilitation (Russell, 1995). This diversity of settings illustrates the range of opportunity and potential for fostering transformative learning in the adult education classroom.

From a methodological perspective, the majority of these studies were qualitative in design, mostly case studies, using predominantly interviews and observations as methods of data collection. Some of the qualitative studies were supplemented with quantitative data, although the quantitative data generally offered little insight into the findings. There was one large quantitative study conducted, that of a survey of four private colleges identifying students who experienced a perspective transformation within the context of their higher education experience (King, 1997). The educational activities identified by the students as contributing to a perspective transformation were informative. However, a significant limitation of this study (similar to the few other quantitative studies involving transformative learning) has been the lack of reliability in identifying a change in meaning schemes and/or meaning perspective.

Fifteen of the studies involved case examples, whereby a classroom(s) or a group of participants were followed throughout a particular educational event ranging from 6 weeks to 2 years. For example, some of these studies explored the impact of particular transformative practices (e.g., critical reflection, group discussion) such as the use of reflective thinking in teaching Bible content in Brazil (Johnson, 1997) or the practice of fostering transformative learning to promote a particular outcome (cultural awareness, Christian beliefs). Another five studies involved interviewing or surveying students after the fact, whereby they reflected back on their transformative experience, identifying contributing factors within the classroom experience. The remaining two studies used transformative learning to develop an instructional model for training family life educators and an instructional training manual for the economically disenfranchised.

One of the most revealing findings about the different methodologies and foci of these studies is the range of what constitutes the practice of fostering transformative learning. Explanation of teaching practices include every imaginable approach—from lecture, role playing, discussion (Brown,

1997) to just promoting critical reflection (Johnson, 1997). In essence, the same problem that I mentioned in my previous review (E. W. Taylor, 1997) about the vague boundaries of what constitutes a perspective transformation also extends to what constitutes fostering transformative learning in the classroom. This lack of criteria for operationalizing the practice of fostering transformative learning is the direct result of most of the studies failing to review any previous research on fostering transformative learning, let alone research on the study of transformative learning in general. This oversight has also contributed to a homogeneous view of learning, a lack of appreciation for the significance of difference and its relationship to transformative learning, with a mere handful of studies (e.g., Herber, 1998; Vogelsang, 1993) exploring cultural differences in relationship to fostering transformative learning in the classroom.

In addition, only a few studies identified in this review addressed the issue of ecological validity, that of providing evidence that promoting the practice of transformative learning in the classroom resulted in valued student outcomes (Kagan, 1990). Beyond promoting change in a frame of reference, did students learn more about the subject at hand when transformative learning was fostered in the classroom? For example, one study involved a comparison of two teaching approaches, each used for two Bible courses on Song of Songs in a theological school in Brazil (Johnson, 1997). One course used an approach that emphasized critical reflection and less biblical interpretation whereas the other course approach emphasized more biblical interpretation (teacher-centered) and less reflection. Through journaling, interviews, participant observation, and testing of comprehension it was demonstrated that there was no difference among the two groups in recall and comprehension of the material. However, in the group where reflection was emphasized, students demonstrated a greater behavioral change in response to the course material and in their relationships with other students and partners. Also, in the final interviews, students in the reflective class continued to demonstrate greater reflection about the subject matter of the course, more so than students in the nonreflective group. In general, many of the present methodological approaches to fostering transformative learning (a) inadequately provide definitive data supporting different forms of transformative learning (change in meaning scheme and frame of reference); (b) demonstrate an over-reliance on retrospective interviews of the participants; (c) give little attention to previous research conducted on

transformative learning theory; and (d) inadequately develop criteria for defining the practice of fostering transformative learning.

Despite these concerns the present research begins to reveal a number of findings that not only support Mezirow's conditions for fostering transformative learning, but also identifies other conditions equally significant. Before discussing the findings it is important to explain that I use the term "essential practices" in the next section to capture what the studies under review found significant to fostering transformative learning and is not meant to imply a set of "truths" about the characteristics of these practices or to overlook the fundamentally constructivist epistemology involved. All that being said, this review does identify factors that begin to give shape and form to the elusive nature of what is meant by fostering Mezirow's transformative learning in the classroom.

Essential Practices Identified in the Review

The approach to making sense of this disparate literature was to identify essential practices for fostering transformative learning based on the shared findings of the different studies. These practices are critiqued in relationship to what Mezirow purports as significant to fostering transformative learning; as well, new categories are offered. The review begins by identifying a number of findings that support the ideal conditions of fostering transformative learning outlined by Mezirow (1995). They include the importance of providing a safe, open and trusting environment for learning (Bailey, 1996; Dewane, 1993; Gallagher, 1997; Heggie, 1998; Ludwig, 1994; Matusicky, 1982; Neuman, 1996; Pierce, 1986; Saavedra 1995, 1996; Sokol, 1998; Wilson, 1995); using instructional practices that support a learner-centered approach and promote student autonomy and collaboration (Bailey, 1996; Gallagher, 1997; James, 1997; Ludwig, 1994; Matusicky, 1992; Pierce, 1986; Russell, 1995; Saavedra, 1995; Sokol, 1998); and the importance of activities that encourage exploration of alternative personal perspectives and critical reflection (Bailey, 1996; Gallagher, 1997; Heggie, 1998; Johnson, 1997; Kaminsky, 1997; King, 1997; Neuman, 1996; Saavedra, 1995; Sokol, 1998; Vogelsang 1993; Wilson, 1995).

Also revealed are an array of other practices that have as much significance as those identified by Mezirow for establishing a democratic, open, rationally oriented learning environment which encourages critical

reflection and consensus among its participants. These other practices tend to be more subjective and equally challenging, if not more difficult to implement as an adult educator. They include: (a) the necessity of teachers to be trusting, empathetic, and caring (Bailey, 1996; Kaminsky, 1997; Ludwig, 1994; Neuman, 1996; Pierce, 1986, Russell, 1995) as well as authentic and sincere, and to demonstrate a high degree of integrity (Pierce, 1986); (b) an emphasis on personal self-disclosure (Dewane, 1993; James, 1995; Pierce, 1986; Saavedra, 1995); (c) the necessity of discussing and working through emotions and feelings before critical reflection (Gallagher, 1997; Kaminsky, 1997; Neuman, 1996; Pierce, 1986; Saavedra, 1995); (d) the importance of storytelling and the use of narrative (James, 1995); (e) the importance of feedback and self-assessment (Pierce, 1986; Saavedra, 1995); (f) solitude (Neuman, 1996); and (g) self-dialogue (Scott, 1991). Some of these findings were identified based on their preponderance in the literature and warrant greater discussion, because they begin to illuminate inherent traits of fostering transformative learning in the classroom.

Six themes emerged from the literature about the nature of fostering transformative learning and its essential characteristics. They include: (a) fostering group ownership and individual agency, (b) providing intense shared experiential activities, (c) developing an awareness of personal and social contextual influences, (d) promoting value laden course content, (e) recognizing the interrelationship of critical reflection and affective learning, and (f) the need for time. To assist in bringing these themes to life, several studies are discussed in greater depth within the various themes to offer a context for understanding the practice of fostering transformative learning in the adult education classroom.

Fostering Group Ownership and Individual Agency

The studies in this review demonstrate that a group setting is the ideal medium for fostering transformative learning. Although not exclusively so, it is a significant contributing factor for fostering group ownership and individual agency among the participants (e.g., Dewane, 1993; Gallagher, 1997; Heggie, 1998; Kaminsky, 1997; Kritskaya & Dirkx, 1999; Neuman, 1996; Pierce, 1986; Saavedra, 1995; 1996; Sokol, 1998). For example, Saavedra's longitudinal study looked at the question, "What process of teacher transformation occurs during social interactions between teachers within a cohesive and sustained study group context?" (p. 16). Over a two-year period Saavedra facilitated the Davis Teachers' Study group. The group

involved six teachers meeting on a weekly basis with the intent of analyzing issues and strategies related to the teaching in each participant's classroom, student learning, and the learning and knowledge development of each participant. Saavedra was able to show that placing teachers *at the center* of their own learning in a critically reflective and social group setting contributes to a transformation. Much of the change among the participants involved developing self-awareness about the perceptions they held about students and parents and how they viewed themselves as teachers and learners. Even though this study is not about a typical adult higher education classroom, it offers much insight into the identification of conditions essential for promoting ownership and agency in relationship to transformative learning, such as the importance for mediation of the different topics discussed and the need for time to reflect and self-evaluate.

Other factors that seem to contribute to a sense of group ownership include the need for participants to have the opportunity to share their social, political, and cultural history with each other in relationship to the overall objective and in a setting that makes an intentional effort to be collaborative and democratic. Also, Saavedra (1995) found embracing dissonance and conflict among group members strengthened the group experience and provided learning opportunities, such as offering an excellent medium for exploring difference in perspective among group members and stimulating critical reflection.

In addition to promoting group ownership, it was equally important that there were opportunities for individual agency, whereby group members tested and explored newly acquired assumptions and beliefs, rather than to simply experience them in relationship to rational discourse and critical *reflection*. Saavedra (1995) believes that

> a relationship is established between the events in the classrooms and the study group that allows teachers to investigate their theories and practices and put into motion a cycle of: taking stock of daily events; applying new strategies; adjusting and making changes; reconstructing activities, strategies and materials; further developing what is effective; and exchanging those that do not work for newly generated applications. (p. 274)

It is the critical interaction between the study group and other interdependent settings in which teachers work that help the teachers deconstruct and reconstruct their practice.

These findings lend much support for creating a cohesive group when fostering transformative learning and the need for learners to explore and make connections outside the group experience. However, what is not clear is how teachers manage the tension of accomplishing course objectives and, at the same time, giving learners choice and control of the classroom experience. In addition, research is needed in understanding ways teachers and students handle competing interest in the classroom, particularly managing the role of conflict and dissent in the promotion of critical reflection. Also, how do teachers who work with larger classes, where the setting is less intimate, foster a cohesive group learning experience?

Providing Intense Shared Experiential Activities

A second theme that emerges from these studies is that fostering transformative learning is not just about making sense of experience through rational discourse. Instead, it requires educators at times engaging learners in intense shared experiential activities that help provoke meaning-making among the participants involved (Gallagher, 1997; Herber, 1998; King, 1999; Kritskaya & Dirkx, 1999). These activities often act as "triggers" or disorienting dilemmas that provoke critical reflection and facilitate transformative learning, allowing learners to experience learning more directly and holistically, beyond a logical and rational approach. For example, Gallagher (1997) explored how an adult drama-in-education facilitated changes in educational understanding and practice among preservice teachers. Drama-in-education is a process that involves all participants in "actively shaping the direction and outcomes of the drama" (p. 14). In this case, it was a series of episodic events based on the lives of the participants. Each event built upon the other, with the outcome not predetermined, took place over an extended time period, involved the entire group including the teacher in its construction, and the audience, was the participants themselves. To carry out this study, Gallagher organized a weeklong intensive creative drama class for grades K–12 educators. Her experiential approach to transformative learning revealed a developmental process of change, an emphasis on professional rather personal growth, and specific episodic events that were significant to the participants' change in understanding. As drama "evolves and participants assume various

perspectives, power differentials are made explicit in a non-threatening way, removed from the 'personal' (as in how I feel) to a more objective consideration (this is how I feel as someone else)" (p. 267).

A second example that illustrates how these intense shared experiential activities can act as disorienting dilemmas is demonstrated in a study by Herber (1998) who sought "to determine if an awareness of the African American struggles for civil rights could precipitate a perspective transformation for preservice teachers taking a foundation level course in urban education" (p. 35). This course was a prerequisite for participants seeking admission to a formal teacher education program at a local university. Central to this study was a series of experiential activities designed to initiate and facilitate the transformative process. First there was a tour of the National Civil Rights Museum in Memphis, Tennessee with the objective of documenting the ongoing struggle for equality in a diverse society. Also included was a focus group discussion following the museum tour, reflective papers, required participant observation of an African-American religious service, and reading of the novel *Roll of Thunder, Hear My Cry* (M. D. Taylor, 1976) which portrays the segregation of African-American children in a Mississippi school system. Herber's study found that the museum tour served as a catalyst for the transformative process for several of the learners. More importantly she learned

> Adult learners can confront a difficult and painful social issue, they can become aware of perceptual distortions about race, they can move to a more inclusive permeable perspective through experiential learning, reflection, and discussion in a context that supports the questioning of assumptions." (p. 158)

These studies reveal that involving learners in intense experiential activities accommodates many of the essential conditions necessary for fostering transformative learning. First, they offer a shared catalyst for change initiating a mutual context for individuals and groups to explore relevant issues through a different medium. Second, within this shared experience, reason and discourse becomes more relevant and meaningful to those involved. Third, these experiences not only provide opportunities for learners to develop greater self-awareness, essential for transformative learning, but also offer ways to confront issues that they find painful and are often resistant to learning about. Questions remain, however, that need

further investigation, such as how does the teacher balance the need for a safe and non-threatening environment while instigating intense experiential activities when practicing transformative learning in the classroom? What factors involving the teacher, the learner, and the classroom environment contribute to the success of these intense activities? What are the rights and responsibilities of learners, particularly in reference to participation in required courses that provide these activities?

Promoting Value-Laden Course Content

Several studies found that controversial and value-laden content played a role in fostering transformative learning (Vogelsang, 1993; Wilson, 1995). It seems that certain subject matter encourages and provokes critical reflection among learners more so than other content. For example, in a longitudinal study Wilson used transformative learning as a theoretical framework to examine the professional socialization of baccalaureate nursing students in the classroom, areas of content, discussion, and questions that acted as triggers to critical reflection about personal and professional values. The content that held the most meaning for the participants involved issues about AIDS, abortion, wellness, spirituality, death and dying, and communication. The controversial content would provoke the learners to reflect on both their personal and professional values, which at times would be in conflict with each other. One example involved a student who could not accept the practice of abortion, even if it meant losing her job.

Similarly, Vogelsang's (1993) findings point to the relationship of value-laden course content and the practice of fostering transformative learning. She conducted a qualitative case study of 20 adult female senior students who were either married or formerly married, with children, and were working on an undergraduate degree. Her intent was to explore their educational experiences and related educational activities as transformative. She found from her participants that "subject matters pertaining to the social sciences were more likely to stimulate transformative learning than subject matters of the 'hard' sciences" (p. 120). The topics most value-laden were found in the study of English, religious studies, speech and communication, sociology, social work, anthropology, women's studies, education, and history. She notes that it was the nature of the subject matter that offered greater personal significance to the learner, thus encouraging reflection and exploration of alternative perspectives. In contrast, it seems that the hard sciences tended to foster instrumental learning, that of learning how to

perform a task. Wilson (1998) offers further clarification, finding that when educational activities even in the social science course are task oriented, the course content still "may make it more likely that alternative perspectives on issues that are of personal significance to the students are presented and thus emancipatory learning is encouraged" (p. 121).

A third example sheds light on how both value-laden course content and intense shared experiential activities were significant to fostering transformative learning. Kristskaya and Dirkx (1999) provide insight into the meaning of the formal text, how meaning is constructed by the participants, and the role of educator in facilitating the meaning-making process. They followed two instructors, who were teaching organizational theory and leadership courses for 9 months and who described their practices as transformative. They found that:

> if the formal text—the content that is to be negotiated and the meaning of which is to be constructed by the students—represents outer work, the teacher's task is to engage participants in a process of negotiation of this text in ways that would be most authentic to their inner journey. (p. 189)

For example, one instructor had students work through a controversial drama, such as a school board meeting; the findings revealed that fostering transformative learning is less about structure and more about process—it requires students to engage the formal text, themselves, and each other at various levels, resulting in not only a greater understanding the of text, but of themselves as leaders. As the formal text is framed within experiential activities it becomes a "metatext," a pedagogic tool for the analysis of the self.

The findings of these studies reveal that use of value laden course content provides a cataylst for critical reflection and an opportunity to promote transformative learning in the classroom. In addition, it poses a challenge for instructors who want to foster transformative learning but who teach the less obvious politically and socially charged subjects, such as the hard sciences and the more skill-based courses.

Capitalizing on the Interrelationship of Critical Reflection and Affective Learning

Another finding that continues to build on upon the same emotional vein raised in the last two practices is that of the interrelationship of critical

reflection and affective learning. This finding is not only consistent with my earlier reviews (E. W. Taylor, 1997, 1998), but also reveals is a deeper level of understanding about the relationship and how it is manifested in the classroom. As shown in Neuman's (1996) study, one of the most extensive ever conducted on fostering transformative learning, it is the learners' emotions and feelings that not only provide the impetus for them to reflect critically, but often provide the gist on which to reflect deeply. Neuman focused on the nature of critically reflective learning among a sample of participants from the intern program of the National Extension Leadership Development Program at the University of Wisconsin. The program curriculum attempted to foster reflection framed within the basic principles of practicing transformative learning. He conducted a qualitative case study over a 24-month period involving nine participants, utilizing in-depth interviews, reflective writing, reflective questionnaires, dialogues, and participant observations. The study reveals six key findings about the relationship of affective learning and the fostering of critical reflection in transformative learning in the classroom. One, a prerequisite for the initial development of a critical reflective capacity (critical reflection and critical self-reflection) requires "acquiring the ability to recognize, acknowledge and process feelings and emotions as integral aspects of learning from experience" (p. 460). Two, the role of affect demonstrated both evocative and provocative characteristics. Evocatively, exploring one's feelings in-depth led to greater self-awareness and the initiation of changes in meaning structures. Provocatively, feelings were often the trigger for reflective learning and an unwillingness to respond to these feelings often resulted in a barrier to learning. Three, affect played a diverse role when learning from experience, such that "when current affect was incorporated into reflective processing, it often produced clues and insights for directing reflection's focus toward the more fundamental or assumptive basis underlying meaning structures and perspectives" (p. 462). Fourth, the processing of feelings and emotions related to experience was both therapeutic (appreciation of working through negative feelings as essential for personal development) and enabling (expanded the power and scope of critical reflection). Five, the outcome of affective learning resulted in a "greater appreciation for differences, tolerance for ambiguity, and feelings for courage, self-trust and inner strength" (p. 463). Lastly, episodes of critical self-reflection can involve intensive emotional experiences, particularly when learners are grieving the loss of old meaning perspectives and the acquiring new ones.

Similarly, in Herber's (1998) study, the visit to the civil rights museum provoked a range of negative feelings, which became the catalyst for questioning the learners' assumptions about race and racism and encouraged self-reflection. In essence, the significance of processing feelings increases the power and appreciation of critical reflection as formative when fostering transformative learning.

Many questions are raised that are not addressed in this research, such as: Do most teachers feel comfortable and professionally prepared to handle emotions surrounding personal issues responsibly in the classroom? What risks are at stake? Is focusing on emotions ultimately going to result in greater outcomes in participant learning? What prevents the educator who gives greater attention to learner feelings from conducting therapy in the classroom?

Developing an Awareness of Personal and Social Contextual Influences

Context refers to personal and social factors that play an influencing role when fostering transformative learning. Broadly speaking, these factors include the surrounds of the immediate learning event, made up of the personal and professional situation of the individual at that time, and the more distant background context involving the familial and social history that has influenced the individual growing up (Clark, 1991, 1992; Sveinunggaard, 1993). Several studies begin to offer insight into contextual factors that influence the practice of fostering transformative learning at the individual learner level and also reveal some of the epistemological tensions inherent between what is fundamental about transformative learning and teaching within an educational setting.

For example, Sokol (1998) explored a best case scenario of fostering transformative learning by observing an expert, Partricia Cranton, teach an adult education course on "Methods and Strategies of Adult Learning." In so doing, she identified several contextual influences. Even though she did not use the term context, she refers to influential factors that seem similar in nature (e.g., voluntary or required participation in the course) and environmental conditions (e.g., classroom physical environment and psychosocial ambiance established by the teacher) that were found to both promote and inhibit transformative learning. For example, Sokol found some students were critical of the democratic practices in the classroom, because they did not see it applicable or relevant to their own teaching practice.

McKinzie (1998) took this idea of context a step further by examining an on-line learning environment which provided opportunities for critical reflection in an effort to "illuminate those factors that contribute to the information literacy of educators and promote opportunities for transformative learning" (p. 22). She looked at the informational context (informational resources, technology and other delivery systems, and people within the institution) and its relationship to a small group of educators in an alternative program within a secondary school setting, who were participating in a professional development course on using the Internet. The findings revealed critical indicators reflective of a "transformative capacity" (p. 136)—the ability of the informational context to facilitate personal change among the participants. "Transformation theory is based on personal change and ... the identified capacity is descriptive of critical indicators in the informational context that seemed to support this process" (p. 136). The critical indicators include: personal indicators (desire, commitment, collaborative culture, degree of computer literacy skills, prior experiences, time); access indicators (availability of the technology); and process over product indicators (project-oriented curriculum, nontraditional assessment methods).

Other personal contextual factors found in this review begin to shed light on the individual learner role in relation to fostering transformative learning. Several studies reveal that some learners have a greater disposition toward transformation—a change of a frame of reference—than others do in the classroom (Bailey, 1996; King, 1997; Neuman, 1996; Pierce, 1986; Vogelsang, 1993). For example, Pierce interviewed 28 managers of a Fortune 500 company who participated in a management-training program and found that those participants who came to the training with recent experiences of critical incidences in their lives seemed more predisposed to change. She states:

> The disturbing events in the participants' lives, therefore, create, a fertile ground for perspective transformation. Ready to question the very assumptions upon which their lives are based, these participants find themselves involved in an educational experience, which encourages a search for meaning, an exploration of oneself and fulfillment of human purpose. (pp. 296-297)

This personal contextual factor, a predisposition for change, has also been found to be developmental in nature (King, 1997; Neuman, 1996;

Vogelsang, 1993). It is based on the assumption that transformative learning reflects a movement through a series of phases by an individual away from a concrete, egocentric, context-free, and nonreflective view of the world towards a more progressive developmental frame of reference. King conducted a survey of over 470 adult learners at four private colleges in the Philadelphia area about what learning activities may contribute to transformative learning. King found a greater incidence of a change in their frame of reference among learners who had been enrolled for more than one semester. This developmental process was also seen in the application of critical reflection, the second essential component of fostering transformative learning. As well, Neuman found that acquiring a critical capacity occurs with and is contingent upon other developmental changes in a person's life. This conclusion is similar to Vogelsang's findings that "the readiness of the student to engage in critical reflection is equally important for transformative learning to take place as the educational activities per se" (p. 122).

These studies clearly indicate the significant influence of social and personal context (particularly the learners' present and past biography), the immediate environmental context of the classroom, and the access to information in fostering transformative learning. These factors bring to light a host of challenges for the practitioner, such as requiring the development of a contextual awareness beyond the mere implementation of various teaching methods when fostering transformative learning. Further research is needed in identifying the interrelationship between specific contextual factors (e.g., courage and maturity of participants, power relations between students and the teacher) and essential components (e.g., critical reflection, affective learning) when fostering transformative learning. In addition, all of these studies have looked at fostering transformative learning as if it stood separate from the socio-historical forces taking place in society and not recognizing how these forces gives shape to the transformative learning experience in the classroom. In other words, how does what is happening in the world outside the classroom—ongoing historical and social events—shape what is happening inside a transformative classroom?

Recognizing the Demand of Time

The final theme is the issue of time. Adhering to the practices of transformative learning, particularly in a group setting, requires an inordinate amount of time, something that many regular adult and higher education

classes do not have (Gallagher, 1997). One study in particular brings this issue to light. Kaminsky (1997) explored how "issues of action, voice, empowerment, and knowledge were enacted in practice" (p. 13). She spent over 10 months conducting a collaborative inquiry with a cohort of 13 doctoral students studying for a degree in adult education. She found that observing the conditions outlined by Mezirow for promoting rational discourse resulted in a challenge: "inclusiveness in terms of stakeholder membership practically guarantees that groups will have different agendas about what needs to be done, making coming to a consensus an onerous, time-consuming task" (pp. 274-275). In particular, the lack of time puts a constraint on providing access to the voices of all the participants as well as coming to consensus around various group decisions. She found that a combination of different expectations, different styles of working, and insufficient time drove the group to "'the edge' where emotions flared, people stopped listening, conversation ground to a halt, and action took the form of inaction" (p. 279). Most of the studies that focused on the practice of fostering transformative learning involved an intense group experience of lengthy duration, and even under these conditions teachers and participants felt constrained by the exigency of time. It seems that the very conditions that foster transformative learning, a democratic process, inclusiveness of agendas, striving for consensus, critical reflection, dialogue, and the like, create such a high demand for time.

Discussion and Future Research

On the surface, these findings about fostering transformative learning seem quite promising. Teachers in the adult and higher education classroom can facilitate significant change in perspective among their learners. The studies reveal that if instructors develop authentic positive relationships with their learners, use creative experiential activities, encourage group ownership and individual agency, discuss value-laden course content, are willing to engage learners on the affective level in concert with critical thinking, and have ample classroom time, change can be initiated among those predisposed to transformative learning. In many ways these studies confirm what the transformative teaching instructional texts advocate, that the potential for transformative learning exists in the classroom. In addition, these findings are consistent with earlier research on Mezirow's transformative learning in general: that the role of feelings and context are significant in the learning

process and cannot be overlooked in the classroom environment when fostering transformative learning.

However, on a deeper level other concerns start to emerge. They include a host of issues that confound and call into question the need and potential of fostering transformative learning in the classroom. Despite this recent research, adult educators are being encouraged to practice a particular approach to teaching towards an outcome (perspective transformation) and with a process that is still inadequately defined and poorly understood, particularly in a classroom teaching experience. Also, when identifying these ideal learning conditions, most authors of these studies, as well as Mezirow himself, under-emphasizes the practical implications associated with facilitating and encouraging learners to revise their meaning perspectives. More specifically, several issues emerge that warrant greater discussion as well as a need for more research in the practice of fostering transformative learning in the adult higher education classroom.

One issue in particular is the challenge for faculty to establish authentic and helping relationships with learners in the classroom. Previous research revealed that developing positive relationships are most significant to promoting effective rational discourse, which is one of the fundamental components of transformative learning (see E. W. Taylor, 1997). However, when it involved the study of fostering transformative learning, most studies overlooked the teacher–student relationship factor, and when they did give it attention, they tended to avoid the more subjective elements of relationship building. For example, Sokol (1998) identified several essential factors of the facilitator' role, such as demonstrating preparedness and flexibility, the use of a variety of teaching methods, and the need to custom tailor these methods to the learners interest, but she overlooked how the more complex issues of trust, honesty, and genuineness were established in the classroom.

This review reveals a neglect of systematic inquiry and discussion on the complexity of personal/professional relationships between student and faculty, which are particularly relevant to a learning process that is personally transformative and professionally challenging. Furthermore, it confirms Robertson's (1996) conclusion that despite all the empirical evidence "the field [adult education] neither adequately prepares nor supports adult educators to manage the dynamics of helping relationships or the dynamics of transformative learning within the context of those relationships" (pp. 43-44). Basic questions need to be explored that center

on: what authentic relationships look like, what steps adult educators should take to ensure their success, and what cautions and concerns instructors need to be aware of. Mezirow, along with others, offer little practical guidance in response to these questions. Establishing teacher–student relationships is often fraught with professional challenges "such as transference, counter transference, confidentiality, sexual attraction, supervision, and burnout, each with attendant ethical, legal, and efficacy considerations" (Robertson, 1996, p. 44). Much research is still needed about the nature of helpful relationships, including when during the process of transformative learning are they most significant, what kind of discourse takes place in helping relationships, and how can helping relationships be safely managed in the adult higher education classroom.

A second issue, very much associated with relational knowing, is that of engaging and promoting affective learning with learners in the classroom. Affective learning, the role of emotions and feelings in meaning making, were found to be essential to transformative processes, particularly the fostering of critical reflection. Affective learning is not only the precursor to reflection, but is often rooted, as Saavedra (1995) found, in conflict. This finding poses tangible challenges to the instructor in the adult higher education classroom. Because transformative learning has the potential to be a deeply emotional experience, it demands considerable knowledge and skill of instructors to manage it responsibly and effectively (Brookfield, 1990; Daloz, 1986). It could also require the instructor to spend time exploring personal issues with learners, very possibly detracting from the overall intent of the course objectives. The impact of transformative learning on the instructors and how they changed when fostering transformative learning was only marginally addressed by the studies in this review. For example, Neuman (1996) found the transformative process to be reciprocal in nature involving both the learner and the instructor, meaning that it is important for the instructor to be both willing to learn and to change himself or herself while encouraging others to transform. Does this mean that instructors need to work through their emotional transformative process in concert with the learners when fostering transformative learning? Is this something that adult educators are prepared and trained to do? How are teachers to deal with the competing interest of delving into personal and emotional issues and making sure that the learners are covering course material? More research is needed in this area, particularly in how to manage emotions effectively in the transformative process, identifying essential affective teaching strategies,

and better understanding of the interrelationship of emotion and critical reflection.

A third issue is that many of the findings revealed in this review identify research-based principles of good practice, particularly with adults in higher education, that also could apply to any type of effective teaching, not just to transformative learning (e.g., see Chickering & Gamson, 1991; Angelo & Cross, 1993). Because many of these studies inadequately operationalized the practice of fostering transformative learning within previous research about Mezirow's theory it is difficult to ascertain what is unique about this particular practice of teaching adults. This commonality with other practices to teaching raises several questions that need to be addressed, such as: Is fostering transformative learning simply a goal about promoting personal transformation? Is it following a set of ideals about learning and teaching? Is it a certain combination of teaching practices? What is fundamental to fostering transformative learning? If fostering transformative learning is to become a teaching practice in its own right, it is imperative that what distinguishes it from other approaches is thoroughly explored. What has been identified so far are shared themes that emerge from the literature that begin to concretize what is essential about the practice of fostering transformative learning in the classroom.

Also, despite all the rhetoric on promoting transformative learning in the adult education classroom, there is little research about its impact on learner outcomes. For example, as a result of fostering transformative learning in an ABE classroom, are adult learners more successful at reading and writing? How can those who advocate this approach demonstrate to their constituency (other practicing adult educators, students) that it is a worthwhile teaching approach when there is little evidence for support?

A fourth issue involves the ethics of fostering transformative learning in the adult higher education classroom. Education is a social activity involving the interaction of people who have differing views and feelings of obligation and responsibility within a process involving more than just one right way to teach. And the objective of adult education is a form of social intervention often resulting in personal and social change, often with unplanned and unintended outcomes (Merriam & Caffarella, 1999). Therefore, the fostering of transformative learning "becomes both a moral activity and a social intervention accompanied by dilemmas over good versus bad and right versus wrong" (p. 371). For instance, just because we as adult educators

believe that fostering transformative learning is in the best interest of our learners, it may not reflect the wishes and desires of the learners themselves or even the institution in which we teach. This ethical dilemma raises a number of questions that need greater discussion, such as: Do we have the right to challenge learners to change and transform? How ethical is it to create conditions that will put learners in such emotionally challenging classroom experiences? Are we as adult educators prepared to handle the responsibility associated with that change? These kinds of questions have not been explored in the present research and need to be investigated in greater depth not only as topics for discussion in the classroom, but as part of future research agendas. Ultimately, coming to terms with the dilemmas and challenges associated with fostering transformative learning will make us all better adult educators.

Conclusion

Transformative learning theory has had a significant impact on the field of adult higher education. Over the last decade it has been one of the most popular topics of presentation at the annual adult education conferences. Following the collapse of andragogy, it seems in the 1990s that transformative learning has attempted to fill the need for a contemporary practice of adult education. However, despite all this interest, the practice of transformative learning is still inadequately understood, researched, and present in the professional literature. This review of the empirical literature offers only a beginning in identifying essential practices for the transformative adult education classroom. Teachers and learners who are willing to engage each other in open and safe group settings, participate in challenging experiential activities, and explore learning beyond the rational to include the extrarational, have the potential for a transformative learning experience. However, there is a caveat that adult educators have to be aware of: we are entering an arena we are only beginning to understand, with still much unknown. Furthermore, not only is there a need for more research, but many adult educators are ill prepared for the formidable task of fostering transformative learning. It could be clearly argued that "the field naively and unwittingly encourages adult educators to practice incompetently with regard to facilitating transformative learning" (Robertson, 1996, p. 50). Therefore, it is imperative that, as we embark on the journey of fostering transformative learning in the classroom, we do so responsibly and with our eyes wide open.

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