

Perspective Transformations: The Good, the Bad, and the Other

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Abstract: The ongoing development of Transformative Learning (TL) theory includes an ever-growing array of perspectives. This is a testament to the power of the theory's underlying concepts and the potential for both broad and specific applicability. The theory was originally conceived as a normative – or prescriptive – framework that hinted at social action and a movement toward democratic education. Over time, the range of voices within the TL community has grown to encompass ideas that do not necessarily conform to these earlier normative underpinnings. A review and analysis of the literature highlights what appears to be a growing dichotomy regarding the process of perspective transformation and the increasing use of both normative and descriptive assumptions and frameworks. This paper highlights two such lenses - descriptive and prescriptive – and recommends the explicit identification of which lens is being used by researchers and authors going forward. This recommendation may also apply to qualitative research more broadly, since researcher positionality, bias, and other similar limitations are often stated. Identifying a researcher's approach can lend transparency and enhance credibility to a study by making the reader aware of any ideological implications, or lack thereof. Likewise, future research and theory development might proceed in a way that is more intentional and transparent.

Keywords: Transformative Learning, Perspective Transformation, Adult Education, Cognitive Development, Education, Ethics, Qualitative Research, Research Bias

1. Introduction

Transformative Learning Theory (TL) is at its core a normative or prescriptive construct. Jack Mezirow, a foundational theorist in Adult Education, has used terms like *permeable*, *inclusive*, and *discriminating* to describe perspective transformations. In fact, these terms have become criteria against which transformations are judged to be either a bona-fide Transformative Learning Experience or another sort of generic transformation not encompassed by Mezirow's conception of TL [30]. The roots of TL reach back to Habermas, and others before him, and so have somewhat of a socialist grounding. In short, this area of research, depending on the author, could be labeled as a normative framework.

While this paper does not take issue with normative theories, the subjectivity inherent in the theories can pose a challenge to researchers attempting to analyze and describe transformations in an adult learning context, and to readers

who may or may not be clear about an author's intentions. A cursory review of the literature on Transformative Learning suggests that embedded in the theory are both normative and non-normative perspectives. When stripped of the normative descriptors and outcomes associated with Mezirow's ideation of perspective transformations, a non-normative or *descriptive* framework emerges that at once both transcends and unifies the diverse views (Hoggan [23]). This lens compliments the normative lens (hereafter referred to as *prescriptive*) commonly associated with TL, most notably Mezirow's description of perspective transformations.

Perhaps the most evident and significant implication of this fissure is that many authors apply one lens or the other (prescriptive or descriptive) without explicitly stating so. One exception is Donovan et al. [17], who do in fact explicitly refer to TL as a "descriptive theory" (p. 3); unfortunately they do not support their contention beyond simply stating it. Mezirow, on the other hand, went to great lengths to craft TL as a normative theory of adult learning. Paradoxically, he has

been criticized for being both too prescriptive and not prescriptive enough, as will be discussed later in this paper.

The tenets of Transformative Learning Theory, Critical Theory, and Social Constructivism support the notion that practitioners should identify and divulge their own biases and assumptions. Without the tools and language that might help facilitate the expression of these biases and assumptions, the epistemological underpinnings of the arguments – and the theories upon which they depend – are undermined. This can lead to specious arguments, and at its worst can support a continuation or even support of the hegemonic assumptions that these theories claim to challenge. This paper proposes a set of criteria, in the form of these two categories, or lenses, by which researchers can conduct their own work and critique the work of others. It is hoped that a more explicit use of these lenses applied to future inquiry and theory development will result in enhanced deliberateness of intent, more transparency in assumptions, and greater clarity of structure in argumentation.

2. Anchors of Transformative Learning Theory

Transformative Learning (Mezirow, [31]; Dirkx [13]) is a cornerstone theory in the area of adult learning and education. It serves as the foundation for several other branches of theory and exists on a continuum of educational theories that both describe the journeys of adults, and serve as a roadmap and framework for practitioners who work with adults (Kegan, [26]; Drago-Severson, [19]). Its significance can be measured not only by the number of authors and works that it has influenced in the years since its introduction, but also in terms of its impact on those individuals who have used the theory in practice to facilitate perspective transformations and the adults who have experienced the transformation. Whether one uses the theory to describe a phenomenon or to facilitate individual development, the importance and impact of TL theory on the field of adult education cannot be overstated.

Jack Mezirow's conceptualization of Transformative Learning Theory took shape three decades ago when he sought to describe the experiences of women returning to college:

Transformative learning refers to the process by which we transform our taken-for-granted frames of reference...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. (Mezirow and Associates, [33])

Here Mezirow uses words like *inclusive*, *discriminating*, *open*, and *true* to describe perspective transformations, which are all highly subjective terms. In addressing such subjectivity, it is easy to become mired in the dichotomy between a rational view – in which some objective truth rules norms – and a relativistic view that allows for any and all

perspectives to be taken with equal weight. This paper agrees with van der Veen [38], who suggests seeking a balance here by defining rationality as “an interplay of instrumental and normative rationality” (p. 35) as “Productive discussions are neither served by drastic exclusion nor by a “radical rejection of enlightenment” (p. 35).

TL can occur across two domains of learning initially proposed by Habermas: *instrumental*—learning to solve problems by manipulating things and people, and *communicative*—learning what others mean when they communicate (Mezirow & Associates [33]). Habermas also suggests additional domains, one of which he terms *normative learning*, which is related to learning the expectations of behavior based on shared values. By carving out this normative space, Habermas implies that there are, conversely, non-normative types of learning as well.

Mezirow suggests that a *perspective transformation* stems from a disorienting dilemma, involves deliberate rational reflection, and implies a linear process. He defines a meaning perspective – or frame of reference – as a “framework of assumptions” that affects how we perceive and experience the world around us (Mezirow & Associates, [33] p. 16). Drago-Severson [18] describes transformation as “a gradual, sequential, and incremental process” (p. 31).

Mezirow has also been critiqued for his structured ideation of the transformation process. One of the most significant critiques in this regard comes from Dirkx [12, 14, 15], who in turn draws on the work of Boyd and Myers [2] and brings a Jungian perspective to the theory. He proposes that TL has a strong affective element and that transformations can stem from everyday normal occurrences. Dirkx acknowledges the complexities of the human psyche, which is perhaps the key difference between Mezirow's view of TL and his own.

Dirkx [28] also suggests that the process of transformation is convoluted and not so easily captured by such conceptual models. He also emphasizes the role of emotion and imagination in transformations, suggesting that “by approaching emotionally charged experiences imaginatively rather than [sic] merely conceptually, learners locate and construct...deep meaning, value and quality in the relationship between the text and their own life experiences” (p. 70). In short, Dirkx notes that different people undergo and experience transformative learning in different ways. Like Habermas, Dirkx's emphasis on subjectivity hints at the need for additional lenses with which to make sense of such transformations. Before defining these new lenses, a look at some of the existing lenses applied to TL may be helpful.

3. Existing Lenses

In addition to the models proposed by Mezirow and Dirkx, the ever-expanding literature on Transformative Learning (TL) encompasses a number of other constructions. To help sort them out, Dirkx [13] suggests four lenses: a *cognitive rational* lens (Mezirow [31, 33]); a *social justice/emancipatory* lens (Freire, [21]); a *developmental* lens (Daloz [11, 22]; Kegan [24, 25]); and a *spiritual* lens (Dirkx,

[16]). Yorks and Kasl [39] propose yet another lens in the form of a *wholistic taxonomy*, which considers, among other things, expressive ways of knowing and the role of emotion as it relates to TL.

Taylor (in Cranton, [9]), on the other hand, provides two lenses: *individual* and *sociocultural*, based on what he refers to as the *locus of learning*. The individual lens encompasses psychocritical, psychodevelopmental, and psychoanalytical perspectives, and the sociocultural encompasses social-emancipatory, cultural-spiritual, race-centric, and planetary perspectives. Definitions of these terms can be found in the literature and are beyond the scope of this paper, but what is most important to note here is the variety of existing lenses applied to TL.

The literature ignores the tension between normative and non-normative aspects of TL and consequently demands additional structures to guide inquiry and give voice to those seeking to expand the theory. Regardless of the lenses currently used, however, TL began as a normative theory of adult education.

4. The Normative Roots of Transformative Learning

Linking socio-political streams of theory with streams of thought in adult education, Mezirow constructed the framework of his theory of Transformative Learning (Brookfield, [5]). As mentioned previously, Mezirow also drew from Habermas and extended Habermas' concern with communicative action to perspective transformation, which in turn expanded Mezirow's own theoretical conceptions of TL.

Mezirow makes one of his most explicit references to social action in stating that adult educators "are committed to efforts to create a more equal set of enabling conditions in our society, to the ideal of social justice" (p. 27) [33]. He also suggests, as does Freire that "adult educators are never neutral...they are cultural activists" (Bell et al., [1]; p. 30). He goes on to say: "Adult educators...create opportunities and foster norms supporting freer, fuller participation in discourse and in democratic social and political life" (p. 30). Both he and Freire warn, as will be seen later, educators against indoctrinating students, but these comments nonetheless indicate normative sensibilities.

Freire who spent many years working with and advocating for laborers in South America, similarly suggests that *conscientization*—a term that Mezirow [33] refers to as "subjective reframing" (p. 23) or a reframing of one's own assumptions related to power dynamics and sociocultural situation (i.e., oppression)—is attained through an educational process designed to elicit such changes. Few would argue that both Mezirow and Freire have established anything but prescriptive constructs of transformational learning. Freire was perhaps more prescriptive in his call for social action, while Mezirow was less so in focusing more on cognition. To obtain a clearer sense of where the theory

bridges prescriptive and descriptive dimensions, however, one must first understand the processes involved.

5. Learning and the Process of Transformation

The concept of learning is clearly at the heart of Mezirow's conception of TL. He writes that learning can happen "by elaborating existing frames of reference, by learning new frames of reference, by transforming points of view, or by transforming habits of mind" (Mezirow & Associates, [30], p. 19). One's meaning perspective in turn affects learning, and provides a context for making meaning. These meaning perspectives encompass two elements: habits of mind and points of view.

A habit of mind, according to Mezirow, is a broad set of assumptions related to one of many areas including culture, morality, philosophy, religion or art. In simple terms, a habit of mind can be seen as an orientation toward a certain way of thinking. A habit of mind is often expressed as a *point of view*, which "comprises a cluster of meaning schemes—sets of... expectations, beliefs...and judgments—that...determine how we judge, typify objects, and attribute causality" (Mezirow & Associates, [30], p. 16).

Transformations occur when we critically reflect upon our assumptions. Some of our most deeply held assumptions exist without our awareness, and so we must identify these values that are *subject* (hidden to us) and make them *object* in order to critically reflect upon them and presumably change them (Kegan, [24, 25]). Changing our most deeply held assumptions is an essential distinction between TL and other types of learning (Mezirow & Associates [30]).

In terms of process, Mezirow suggests that *critical reflection* and *reflective discourse* are at the heart of transformative learning and involve "a critical assessment of assumptions. It leads toward a clearer understanding by tapping collective experience to arrive at a tentative best judgment" (Mezirow & Associates [30], p. 11). Through rational and reflective discourse with others, we can uncover deeply held beliefs and gauge them against the yardstick of their perspectives and the consensus of those we include in this discourse. This is an important element of the process as it clearly suggests that others can heavily influence the dialog and, hence, the nature of the transformation. While Dirkx proposes a less structured internal process, he does acknowledge the influence of others [16].

These questions are rhetorical to a degree because the extent to which the answers can be generalized is uncertain. In addition, we are once again forced to contend with the complexities introduced by the notion of context. To help move closer to a greater sense of clarity, it is important to understand what is being transformed and what other sorts of changes occur before, during, and after perspective transformations. In this regard, the work of Kegan simultaneously complements and stands in juxtaposition to Mezirow's work.

6. Constructive Developmental Theory and Transformations

Constructive-Developmental Theory (CDT) (Cook-Greuter, [8]; Drago-Severson, [18]; Kegan, [24, 25]) provides a framework with which to explain the different ways that adults make meaning of the world around them. CDT builds on Piaget's work delineating the developmental stages in childhood. Kegan calls developmental stages in adults *ways of knowing*, although Drago-Severson interchangeably uses the terms "meaning-making system," "way of knowing," and "developmental level." [18]

In his book *In Over Our Heads*, Kegan [24] suggests that the social structures of the modern world have become so complex that we require increasingly complex ways of knowing to help us make sense of them. He describes six developmental levels through which adults can progress, each level encompassing more complexity than the preceding one. It is not our fund of knowledge—the amount of knowledge we possess—but rather our ways of knowing, Kegan argues, that need to improve if we are to make meaning of our increasingly complex world. According to Kegan and Lahey "we are already well informed, and it is maddeningly insufficient" (p. 232). In other words, it is not *what* we know, but *how* we know [27].

CDT stems in part from constructivism, which holds that people actively construct their own reality by reflecting on experiences, and not by merely absorbing them passively. The theory is also developmental in that it suggests that individuals pass through various levels of increasing complexity over a lifetime. In addition, CDT holds that emotions play a role in adult development, whereas Piaget focused primarily on cognitive development [34, 35]. In CDT, the process of transformation is as important as any stage occupied by an individual, and the influence of social context on development is equally important.

The movement from one way of knowing to another may entail increasingly complex thought processes, but new questions emerge: Do such transformations require *acceptance* of the views of others, or do they simply entail a new way of meaning making in which the subject attempts to *understand* the views of others? Can a person undergo a transformative learning experience and come to reject the views of others? What if those views are or are not in agreement with our own? The answers to these questions depend in part on who is asked and which lenses that individual applies.

In light of the normative construct of TL as envisioned by Mezirow and others, one is also led to consider whether some developmental levels, as defined in CDT, are *better* than others. Taking an apparently descriptive view, as defined earlier in this paper, Drago-Severson et al. [20] and Kegan [24], tell us that one way of knowing is not intrinsically better than another; successive levels are merely more complex and allow for more sophisticated meaning making. One would be hard pressed, however to claim that less complex thinking is just as desirable as thinking that is less

complex. For example, how far down in Piaget's model would one have to go before alarm bells are sounded? On the other hand, if one agrees that an individual must possess certain cognitive ability to engage in the critical reflection required for a perspective transformation (Merriam, [28]), this indeed implies that some levels are at least qualitatively better than others if not morally or politically.

While these developmental processes are presented as sequential, people of similar ages and phases of their lives may be at different stages in their development. In addition, as will be discussed below, adults undergoing these changes need different supports and challenges to help them cope with the increasing complexity and ambiguity with which they are confronted. These supports and challenges are part of what Kegan [25] and Drago-Severson [18] describe as the *holding environment*, and here once again the notion of context demands consideration.

7. The Challenge of Context

Drago-Severson et al. [20] describe the role of the holding environment in transformations:

Students with different ways of knowing need different forms of support and challenge from their surrounding contexts to grow. [These] "holding environments," when successful, can help students grow to manage better the complexities of their learning and their other social roles. (pp. 15-16)

She later postulates that one's way of knowing can in turn influence how one construes and makes use of supports and challenges. Therefore, not only does the holding environment impact a person's learning experience, but one's way of knowing can in turn influence the way one perceives the holding environment. One may deduce from this line of reasoning that the holding environment is subordinate to the developmental stage. In other words, if a person does not see the value of her holding environment due to her current perception of it, then he or she must progress to a new way of knowing in order to recognize the value of those supports and challenges and then make use of them. It is clear, then, that the holding environment matters.

Taking this a step further, Clark and Wilson [6] warn against approaching TL from a decontextualized perspective. They cite Mezirow's attempt to extrapolate the process seen in the women in his early study to the broader adult population, which caused the theory to lose its original context and meaning. They conclude that, "context...is integral to the structure of the [TL] theory" (p. 79). Clark and Wilson also chide Mezirow for "uncritically incorporating [into TL theory]... the hegemonic American values of individualism, rationality and autonomy" (p. 80); however they do not adequately explain precisely how these particular values are uniquely American, or how individualism and autonomy redound to hegemony. Paradoxically such arguments apparently presented to support TL reflect the very values that the theory tries to countervail.

This is not to say that a normative or prescriptive approach

should never be taken, but rather that it introduces subjectivity, which by implication is exclusionary. Exclusion in the social sciences should be justified or at least before it is applied. Therefore, one should be intentional when applying normative assumptions to a process that involves examining underlying assumptions. The process of uncovering our most deeply held assumptions can be arduous, emotional, and confusing; which also applies to research and writing.

While Mezirow's early conception of TL was derived from the emancipatory domain, he later expanded the theory to become more broadly descriptive of the processes and outcomes of perspective transformations. Mezirow [32] suggests that "the universal constructs of...adult learning are interpreted differently by different cultures and in different time periods. Choice is rational if one chooses well. The culture and time determines what 'well' means" (p. 2). Here he recognizes the influence of context and tacitly acknowledges the challenges posed by any normative application of the theory.

The constructive nature of learning suggests that it is context-bound — students' journeys are all very different. Harkening back to Habermas, we are compelled to acknowledge that learning cannot be disconnected from its communicative dimension. All of our contexts, communications, and interrelationships are inherently emotional and subjective (Brookfield, [4]; Heron [22]). When these notions are combined, we can conclude that myriad perceptions, learning processes, and outcomes are possible in any given learning or developmental context.

A key element of context that seems to be downplayed in the literature is the issue of locality. As mentioned earlier, Taylor [37] provides two lenses to help frame discussions in this regard. Social action theory addresses local context to a certain degree, but transformative learning, critical theory, and social action theory all seem to emphasize broader social movements and tend to ignore the impact of micro-environmental factors on learning. Brookfield [3], for example, suggests that critical reflection should be aimed at hegemonic assumptions and power dynamics. Habermas too recognizes that some social action comes from a critique of the consensus of the dominant culture (Van Der Veen, [38]). When applied at a local or individual level, however, many outcomes are possible and not all transformations will necessarily meet Mezirow's strict prescriptive criteria.

What of a young man who is raised in a feminist commune? Upon critical reflection, he might justifiably come to different conclusions about power dynamics than if he had been raised in an all-male racist environment. Again, perspective and context are crucial elements in framing transformations and in subsequently judging them from a normative perspective.

The contexts of learners who undergo transformative learning experiences, regardless of the lens or model applied, create challenges in crafting theoretical generalizations. Such challenges are inherent in the development of any overarching theory that addresses adult learning, but in this case the very values engrained in the theory are in danger of

being eradicated - or *excavated* (Brookfield, [4]) - by the theory's incapacity to adequately address the myriad outcomes it enables. This need not be the case, however, if one considers a broader view of TL through the explicit application of a non-prescriptive, or descriptive, lens.

8. The Descriptive Lens

In concluding his literature review of Transformative Learning, Taylor [37] calls for, among other things, a "broadening of the definition of a perspective transformation" (p. 1). A descriptive view of TL allows for such a broadening by allowing for a variety of transformations, normative and otherwise. While it does not appear that Taylor is suggesting that we strip the theory of its normative orientation, his comment suggests that this might be appropriate at times, as does Hoggan [23].

Mezirow was criticized for broadening the theory, which was seen by some as a distancing from those roots. One such critique cited his "lack of a coherent, comprehensive theory of social change" (Collard & Law, [7], p. 102). Mezirow [29] responded to this critique in his retort: "it seems unsupportable to suggest that every perspective transformation must involve a critique of social oppression" (p. 225). These statements indicate that there may be room for multiple views, and that in fact this might be welcomed.

Mezirow [29] describes critical reflection as "appraisive rather than prescriptive or designative" (p. 88). He also points out that "Habermas follows Hegel and Marx in rejecting the notion that a transformed consciousness can be expected to lead automatically to a predictable form of action in a specific situation" (p. 88). He later adds, "One cannot become emancipated through indoctrination" (p. 88). These statements seem to indicate that he has struggled with the epistemological implications of TL despite his normative intentions.

There are arguments supporting a number of approaches to the development, analysis, and application of theory as well. Prange [36], for example, explicitly discusses the prescriptive versus descriptive contributions made by various organizational learning theories. In highlighting different theorists, she makes a case for a descriptive approach to theory building. To this end she suggests, among other things, that "one should *describe* processes and results of organizational learning, rather than undertake a futile attempt at prescriptive generalization" (p. 31).

Some argue that the use of a descriptive lens applied to perspective transformations is tantamount to a regression to rationality and *instrumentalization* (Van der Veen [38]). To lose the normative elements inherent in TL and adult education is to move in a direction that is antithetical to the tenets of the theory itself. Cunningham [10] expresses this notion in stating that "democratic adult education should facilitate the production of knowledge by the 'have-nots' to counter the official knowledge of the 'haves'".

Yet another perspective comes from Kegan [26], who, like Brookfield [4], makes a compelling argument that the

word *transformation* is in danger of losing its original meaning because of its increasing ubiquity. He laments that the word “begins to refer to any kind of change or process at all.” (p. 47). While Kegan may take issue with this diluted meaning, he nevertheless recognizes that the dilution has apparently already happened and that descriptive views are in play.

These three perspectives suggest that some action be taken, and in light of this it is incumbent upon researchers to provide new tools that will guide future inquiry without losing sight of the goals of adult learning and education. The provision for these two new categories – descriptive and prescriptive – may serve this purpose.

9. Conclusion

This paper advocates for the explicit use of two lenses in the study of Transformative Learning. In building an argument for an explicit delineation as has been presented here, one might conclude that the emphasis of adult education should, like water, take the form of its container; that social change is less important than the analysis applied to justify its proposed outcomes. However, it is not necessary to subscribe to the term *descriptive* or the theories encompassed by this lens any more than it is necessary to subscribe to the term *bigotry* or the behaviors that are encompassed by it. These terms serve as descriptors that help us to categorize, analyze, and conduct inquiry. And while these terms vary in their level of subjectivity, they have intrinsic, non-normative value in research as discussed earlier. A descriptive lens also allows researchers, who are so inclined, to reject transformations that are not aligned with certain models of TL, while simultaneously creating a more expansive space to analyze transformations that fall outside the boundaries set by normative models.

When liberated from its prescriptive constraints, Transformative Learning theory provides a unique framework with which to describe a wide variety of intellectual and emotional journeys. It has been argued here that many authors only implicitly apply these lenses. A more explicit use of the terms descriptive and prescriptive as qualifiers—applied not only to transformations and branches of theory, but to other adult education theories as well—provides us with a more robust set of tools with which to describe learning in all its forms.

A constructivist epistemology demands that researchers in the field of adult education should be explicit about their assumptions, perspectives, and lenses. Since the proposed lenses are dichotomous, there may be significant implications in that future Transformational Learning theory development and the analysis of perspective transformations may proceed down two or more paths going forward. Some have implicitly argues that his is already happening as mentioned above. Consequently, such lenses and models can help frame new constructs at a broad level, or serve as a metric of sorts against which a given perspective transformation can be judged at a more granular level to be good, bad, or neither. It

is hoped that applying the two proposed lenses will accomplish these goals without diminishing the spirit of social change inherent in Transformative Learning theory.

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