The Handbook of Transformative Learning

THEORY, RESEARCH, AND PRACTICE

Edward W. **Taylor** • Patricia **Cranton**
and Associates

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*The Handbook of
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PART ONE

SETTING
THE CONTEXT

Transformative Learning Theory

Seeking a More Unified Theory

Patricia Cranton and Edward W. Taylor

The purpose of this chapter is to explore the key issues in theory, practice, and research in transformative learning with a view of moving toward a more unified theory, one in which the current perspectives can be brought together under one theoretical umbrella. Currently, there is a diversity of theoretical perspectives, which brings a rich complexity to our understanding of transformation, but there is also a tendency to think in dualisms. For example, theorists and researchers write about rational *or* extrarational processes, a focus on individual change *or* a focus on social change, autonomous learning *or* relational learning. However, these perspectives, and many others that are presented in this volume, can coexist. It may be that for one person in one context, transformative learning is a rational endeavor; for that same person in another context, it could be emotional and intuitive; in some contexts, social change may need to precede individual change, and in another context, individual transformation drives social transformation, and so forth. The outcome is the same or similar—a deep shift in perspective, leading to more open, more permeable, and better-justified meaning perspectives (Mezirow, 1978)—but the ways of getting there can differ depending on the person or people and the context or situation. There are many examples in the chapters that follow—stories of individual change, organizational change, social change, and global change. A more unified theory allows us to continue to speak of transformative learning while maintaining the diversity of approaches that are so important to the complexity of the field of adult education.

In this chapter, first, we briefly set transformative learning in the general context of adult learning. We review the philosophical underpinnings of transformative learning theory and explore how these have led to the current dominant perspectives in the field. This takes us to the existing tensions and issues in the literature on transformative learning theory, research, and practice. We note how the diverse perspectives presented in this Handbook can point us toward a more unified theory.

THE CONTEXT: ADULT LEARNING

Over the decades since Lindemann's (1926) *The Meaning of Adult Education* was published, adult learning theory has evolved into a complex, multifaceted set of theoretical perspectives. Early adult educators (Moses Coady, Myles Horton, and Paulo Freire, for example) focused on emancipatory learning and achieving freedom from oppression, but when humanism became the prevailing philosophy underlying education in the 1960s, many theorists turned toward understanding individual learning processes.

Adult learning has been described consistently as a process that is different from children's learning since Malcolm Knowles (1975, 1980) made that distinction. In the 1970s and 1980s, adult learning was described as voluntary (individuals choose to become involved), self-directed, experiential, and collaborative. Adults "going back to school" were thought to be anxious and lacking in self-esteem based on their earlier childhood experiences in education. Brundage and MacKeracher (1980) provide a good example of the early efforts to define principles of adult learning. During that time, adult learning was seen to be a cognitive process that led to the acquisition of skills and knowledge. Early writings on transformative learning reflected this general trend (for example, see Mezirow, 1981). Instructional design and program planning models focused on setting objectives, finding appropriate learning strategies, and objective assessment of the learning. Knowles (1980) advocated that the learner be involved in making instructional design decisions, but aside from that, the process did not deviate much from instructional design in any other setting.

Things began to change after the publication of Brookfield's (1986) *Understanding and Facilitating Adult Learning.* He critiqued the automaton approach to meeting learner needs and discussed the political dimensions of self-directed learning (Brookfield, 1993). Attention returned to the social context of adult learning and to learning that goes beyond cognitive processes. As Merriam (2008) points out, adult learning theory began to draw on situated cognition theory, feminist theory, critical social theory, and postmodern theory. Adult learning is now described in relation to embodied learning, the emotions, spirituality, relational learning, arts-based learning, and storytelling.

Non-Western perspectives, which reject Western dichotomies such as mind-body and emotion-reason, are contributing to an interest in holistic approaches to understanding adult learning (Merriam & Sek Kim, 2008).

The evolution of transformative learning theory has paralleled and been strongly influenced by the development of adult learning theory in general. As Gunnlaugson (2008) suggests, we are now in the "second wave" of theory development in the field of transformative learning; that is, we are moving toward the integration of the various factions of the theory and into a more holistic perspective.

TRANSFORMATIVE LEARNING THEORY: PHILOSOPHICAL UNDERPINNINGS

The first comprehensive presentation of transformative learning theory was Mezirow's (1991) *Transformative Dimensions of Adult Learning.* This book was preceded by a companion volume of more practical strategies for fostering transformative learning, *Fostering Critical Reflection in Adulthood* (Mezirow & Associates, 1990). Both of these books drew on diverse disciplines—including developmental and cognitive psychology, psychotherapy, sociology, and philosophy—to come to an understanding of how adults learn, transform, and develop. Mezirow (1991, p. xiv) explained that transformative learning theory "does not derive from a systematic extension of an existing intellectual theory or tradition"; rather, it is an integration of his earlier research and concepts and theories from a wide array of disciplines. Transformative learning theory is based on constructivist assumptions, and the roots of the theory lie in humanism and critical social theory. In this section, we review the constructivist, humanist, and critical social theory assumptions underpinning transformative learning theory.

Constructivist Assumptions

Mezirow (1991) was explicit in saying that constructivist assumptions underlie his theory. He wrote about his "conviction that meaning exists within ourselves rather than in external forms such as books and that personal meanings that we attribute to our experience are acquired and validated through human interaction and experience" (p. xiv). Transformative learning theory is based on the notion that we interpret our experiences in our own way, and that how we see the world is a result of our perceptions of our experiences.

Transformative learning is a process of examining, questioning, and revising those perceptions. If we were to take the philosophical perspective that there are universal truths and constructs that are independent of our knowledge of

them, then the goal of education would be to find those truths. Instead, argued Mezirow in 1991, we develop habitual expectations based on past experiences. We expect things to be as they were before. Or, put another way, we uncritically assimilate perspectives from our social world, community, and culture. Those perspectives include distortions, stereotypes, and prejudices. They guide our decision making and our actions until we encounter a situation that is not congruent with our expectation. At that point, we may reject the discrepant perspective or enter into a process that could lead to a transformed perspective.

Humanist Assumptions

Humanism is founded on notions of freedom and autonomy. Human beings are seen to be capable of making personal choices within the constraints imposed by heredity, personal history, and environment (Elias & Merriam, 2004). Humanist principles stress the importance of the individual and specific human needs. Among the major assumptions underlying humanism are the following:

- Human nature is inherently good.
- Individuals are free and autonomous, thus they are capable of making major personal choices.
- Human potential for growth and development is virtually unlimited.
- Self-concept plays an important role in growth and development.
- Individuals have an urge toward self-actualization.
- Reality is defined by each person.
- Individuals have responsibility to both themselves and to others (Elias & Merriam, 2004).

These humanist assumptions are inherent in transformative learning theory. If we could not make the assumptions that people can make choices, have the potential for growth and development, and define their own reality, transformative learning could not be described as it is described. What is problematic here is that the assumptions are rooted in a Western perspective; this may contribute to the challenges theorists encounter when transporting transformative learning theory into non-Western perspectives or attempting to integrate the two (Wang & King, 2008).

Humanist psychologists Maslow (1970) and Rogers (1969) had a strong influence on adult education in general and also specifically on Mezirow's conceptualization of transformative learning. Maslow's concept of self-actualization includes, among others, the characteristics of acceptance of self and others, and having peak experiences that lead to personal transformation. Rogers, known for his client-centered therapy, inspired Knowles's (1975) development of self-directed learning as a central concept in andragogy.

Critical Social Theory Assumptions

Critical social theory originated in the Frankfurt School of Critical Social Theory, especially from the work of Max Horkheimer. The goal of critical social theory is to critique and change society as a whole rather than explain or describe it. Brookfield (2005) gives three core assumptions of critical theory related to how the world is organized:

1. That apparently open, Western democracies are actually highly unequal societies in which economic inequity, racism, and class discrimination are empirical realities

2. That the way this state of affairs is reproduced and seems to be normal, natural, and inevitable (thereby heading off potential challenges to the system) is through the dissemination of dominant ideology

3. That critical theory attempts to understand this state of affairs as a necessary prelude to changing it (p. viii)

The dominant ideology in a society includes the beliefs, assumptions, and perspectives that people use to make sense of their experiences. If a part of the dominant ideology is, for example, capitalism, then it makes sense to center one's life on the acquisition of wealth and materials. In this way the dominant ideology perpetuates itself—it is seen to be the normal way to think and act, and it is seen to work in our best interests. Challenging and breaking through this cycle is the work of critical theorists.

At the center of transformative learning theory is the notion that we uncritically assimilate our values, beliefs, and assumptions from our family, community, and culture. In other words, we adopt the dominant ideology as the normal and natural way to think and act. When we are able to recognize that these beliefs are oppressive and not in our best interests, we can enter into a transformative learning process. Although early critiques of Mezirow's theory focused on his failure to address social change (Collard & Law, 1989) and his neglect of power issues (Hart, 1990), a careful reading of Mezirow's (1991) presentation of the theory reveals that he did pay attention to these issues, even though he was primarily interested in the perspective of the individual engaged in transformative learning.

Dominant Perspectives on Transformative Learning Theory

Transformative learning scholars have categorized the dominant perspectives on transformative learning in a variety of ways. Transformative learning is described as cognitive and rational, as imaginative and intuitive, as spiritual, as related to individuation, as relational, and as relating to social change, to name just a few of the most common perspectives. Each of these perspectives is described in this Handbook; the overlap between them and the fragile nature

of the boundaries that have been artificially set up to distinguish between them becomes apparent.

Examining the philosophical assumptions underlying the dominant perspectives on transformative learning illuminates how these perspectives may simply be the result of scholars examining different facets of the same thing. It is our hope that this volume will help readers see the whole elephant.

Mezirow (1991) is explicit in describing transformative learning theory as being based on constructivist assumptions. Meaning is constructed through experience and our perceptions of those experiences, and future experiences are seen through the lens of the perspectives developed from past experiences. Learning occurs when an alternative perspective calls into question a previously held, perhaps uncritically assimilated perspective. Mezirow sees this as a rational process, but others suggest otherwise. This, however, does not negate the constructivist underpinnings of the theory. An imaginative and intuitive approach to learning or a spiritual approach to learning also relies on the construction of meaning from experience. The actual process involved in the construction of meaning may be different, but meaning is still constructed; it does not exist as an absolute truth outside of the self.

Dirkx (2001) and others who propose an extrarational (imaginative, intuitive, individuated, depth psychology) approach to transformative learning are easily associated with the philosophical assumptions of humanism—freedom, autonomy, choice, importance of the individual. If transformative learning is about differentiating the self from the collective through bringing the unconscious to consciousness as the depth psychologists propose, then it is about defining the self—a humanist goal.

The cognitive rational approach to transformative learning is also concerned with freedom, autonomy, and choice. People make a choice to engage with an alternative perspective; without this caveat, we move into the realm of manipulation rather than transformation.

Those theorists who focus on relational or connected transformative learning suggest that individuals learn through relationships with others. Autonomy therefore seems to take a back seat. However, if we look at this carefully, we see that relational learning is a process by which individuals suspend judgment and struggle to understand others' points of view from their perspective (Belenky & Stanton, 2000). The goal is to see holistically, not analytically. But we are still moving to the same place—individuals moving toward a better understanding of the self by engaging with others. It is interesting to note that one of the assumptions of humanism is that reality is defined by each person—a constructivist assumption.

When we come to critical social theory, at first glance there seems to be a serious disconnect with the previous philosophical perspectives (this was the basis of early critiques of Mezirow's work). It is helpful here to turn to

Brookfield's (2005) seven learning tasks associated with critical theory. The first of these learning tasks is *challenging ideologies*—the ideologies embedded in language, social habits, and cultural forms. Ideology is a "broadly accepted set of values, beliefs, myths, explanations, and justifications that appears self-evidently true, empirically accurate, personally relevant, and morally desirable to a majority of the populace" (p. 41). As such, ideologies are hard to detect (they appear to serve the interests of everyone), but they are what prevents us from realizing our true interests. The second learning task Brookfield extracted from critical theory is that of *contesting hegemony.* Hegemony occurs when people embrace (and see as normal) the conditions that serve those in power but work against the people's own best interests. For example, with the help of the media, we come to accept corporate takeovers and government bailouts as normal. The third learning task is *unmasking power* (Brookfield, 2005), based primarily on Foucault's ideas about individual interpersonal relationships (such as between teacher and learner or among learners) and in broader social structures. Unmasking power involves recognizing how power is exercised in our own lives in everyday actions. *Overcoming alienation* is the fourth learning task of critical theory. We are alienated when we are unable to be ourselves, unable to be authentic in the way in which we live and work. The learning task is to develop a sense of free agency and to realize how our lives are shaped by our social contexts. Brookfield lists *learning liberation* as the fifth adult learning task. Marcuse (1964), in *One-Dimensional Man,* argues that people can escape one-dimensional thought and ideological domination through imagination and the arts. *Reclaiming reason* is the sixth task in a critical theory approach to adult learning. Reclaiming reason involves applying reason to examining how our lives have been shaped by the lifeworld. The seventh and final learning task that Brookfield (2005) lists is *practicing democracy.* Brookfield claims that the word "democracy" is used in so many ways and with so many agendas that it has no real meaning. What we need to do is to practice democracy through rational discourse, paying attention to ideal speech conditions, increasing our awareness of the contradictions inherent in the ideal of democracy, and pay attention to power structures related to diversity (for example, race, class, gender, ethnicity, and sexual orientation).

There is a seeming disconnect between the critical social perspective and the constructivist and humanist perspectives: the former has a social "unit of analysis"; the latter, an individual "unit of analysis," to use Taylor's (2008) wording. A careful examination of the learning tasks of critical theory reveals that the focus is on critically questioning social structures that are the basis of inequities and oppression. It is the content of learning that is different—centered on the world outside of the self and the individual's position in that world rather than on the self, as it is in previously discussed perspectives. Mezirow (2000) refers to these processes as objective reframing (related to the external world)

and subjective reframing (related to the self). Each of these learning tasks is about what individuals can and should do to increase their awareness of social conditions. Transformative learning theory need not be about individual transformation *or* social change; it is about both. Viewed in this way, this perspective is another leg of the elephant—an important leg, without which the elephant would fall down, but nevertheless, a part of the whole.

TENSIONS AND ISSUES IN THE FIELD

Scholars from a variety of perspectives within adult education and scholars from other disciplines other than adult education have been drawn to transformative learning theory. As a result, there are growing pains in the form of varied understandings of what transformative learning is and is not, seemingly conflicting perspectives on the learning processes involved, and unresolved issues related to theory development, which may in turn be creating stagnation in research and theory. Merriam, Caffarella, and Baumgartner (2007) list the following as unresolved issues: the role of context, rationality, and affect; the role of relationships in transformative learning; the place of social action; and the educator's role in fostering transformative learning. In this section, we highlight some of these tensions and issues in transformative learning theory.

Boundaries of the Field

Generally in the literature, there is an assumption that transformative learning is different from other kinds of learning (such as acquiring a new skill or elaborating on existing knowledge) (Mezirow, 2000). The *Journal of Transformative Education* maintains this distinction when the editors write that the journal is not another journal on education, but rather a "journal of another education" (Markos & McWhinney, 2003). But the boundaries remain unclear. Brookfield (2000) problematizes the idea of transformative learning, describing what he sees as the "misuse of the word *transformation* to refer to any instance in which reflection leads a deeper, more nuanced understanding of assumptions" (p. 139). He proposes that learning can be called transformative only if it involves a fundamental change at a very basic level, and he goes on to say that the indiscriminate use of the word "transformative" leads to the loss of its utility and validity. Similarly, and perhaps even more strongly, Newman (2011) presents examples of published works in which change of any kind (for example, becoming more open to other points of view, gaining self-confidence, "seeing things differently") are described as transformative. He challenges us to consider whether transformative learning exists as a distinct form of learning.

Teaching for transformation, he suggests, is simply good teaching. Scholars in the field need to continue to question the fundamental meaning of transformative learning and to refer back to original sources in doing so.

Fragmentation and Integration

As mentioned in the opening of this chapter, scholars and theorists tried to make meaning of the development of transformative learning theory by distinguishing one approach from another and categorizing accordingly. Early on, in response to Mezirow's (1991) work, individual and social change perspectives were defined, with the social change theorists critiquing the theory for overlooking social change. Within the focus on individual transformation, further splinters are immediately visible. Set up in contrast to Mezirow's cognitive approach is the extrarational approach or, as labeled by others, the depth psychology approach. Depth psychology theorists (Boyd & Myers, 1988; Dirkx, 2001) define transformation in relation to the Jungian concept of individuation, in which individuals bring the unconscious to consciousness as they differentiate Self from Other and simultaneously integrate Self with the collective. Also within the individual focus is a developmental perspective, wherein shifts are described in the way we make meaning—moving from a simplistic reliance on authority to more complex ways of knowing or higher orders of consciousness (for example, Kegan, 2000).

Within the focus on social change, some theorists see race and power structures as pivotal to ideology critique (Johnson-Bailey & Alfred, 2006). Tisdell and Tolliver (2003) add spirituality, symbolism, and narrative to what has been called the social-emancipatory approach. And there are those theorists who are interested in how groups and organizations transform.

In light of all of these fragments, what does transformative learning mean? When we use the phrase, what are we talking about? Clearly this is also related to the issue of boundaries discussed previously. However, some recent work is focusing on integration and holistic understandings in order to overcome a problematic plunge into a fragmented theory. At the 2005 International Conference on Transformative Learning, Dirkx and Mezirow engaged in a debate (Dirkx, Mezirow, & Cranton, 2006) that modeled an integrative process. They each presented their point of view, then looked for commonalities, overlap, and ways in which the two quite different perspectives could coexist without contradiction. Dirkx indicated that he was not denying the rational process of transformative learning; rather, he was simply more interested in the subjective world and the shadowy inner world. Mezirow acknowledged the significance of this dimension and added that there must also be a critical assessment of assumptions to ensure that they are not based on faith, prejudice, vision, or desire.

Gunnlaugson (2008) advocates working with a meta-analysis of what he calls the first-wave and second-wave contributions to the field of transformative learning in order to integrate perspectives. The first-wave contributions are those that build on, critique, or depart from Mezirow's account. Second-wave contributions are those that yield integrative, holistic, and integral theoretical perspectives. Gunnlaugson suggests that Taylor's (2006, 2008) integrative overview of the field is one example of how this supportive yet critical picture of the theory is beginning to emerge. Theorists and researchers need to identify what various perspectives on transformative learning theory have in common rather than continuing to try to distinguish between them. This is what we hope to encourage with our call for a more unified theory.

Social-Individual Tensions

The social-individual tensions go beyond the notion that some transformative learning is relevant to the individual and some is related to social change. Early on, Mezirow and Associates (1990) distinguished between the educational and political tasks of transformation. The educational task is to help people become aware of oppressive structures and develop the ability to change them (p. 210).

Taylor (2009) writes that "one framework . . . involves a collection of theoretical constructs that emphasize personal transformation and growth, where the unit of analysis is primarily the individual, with little attention given to the role of context and social change in the transformative experience" (p. 5). Social transformation, on the other hand, he describes as being about ideology critique whereby people "transform society and their own reality" (p. 5). The line between individual and social transformative learning is by no means clear. Rather than holding a dualistic viewpoint of "individual versus social" transformative learning, in a more unified theoretical stance we would think about how people engage in both ideology critique and individual transformation and how these processes complement each other.

Stagnation in Research and Theory

Considering the exponential growth of research on transformative learning theory over the last twenty years, it would be logical to conclude that the level of theoretical analysis is hard to contain and that many of the fundamental questions have been thoroughly explored. However, despite the intense interest in this theory, much of the research is redundant, with a strong deterministic emphasis of capturing transformative experiences and replicating transformative pedagogy in various settings, while overlooking the need for more in-depth theoretical analysis, including Mezirow's perspective as well new and emerging perspectives. Without an ongoing theoretical review, transformative