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Transformational Learning: Creating Attitudinal Shifts in Online Learners

Transformative experiences cause us to think differently and can even alter our cherished assumptions. When our learning is transformative, our perspectives change, our attitudes shift, and we begin to see ourselves and the world around us through new lenses. Learning environments that challenge students to question what they believe to be true and ultimately to interpret information more critically can be transformative. But change is seldom easy for individuals at any stage of their careers. For example, in health care, learners who have not yet served in the field may feel that they have not gained sufficient disciplinary knowledge to question existing assumptions. Learners with experience in health care bring perspectives supported by real-world
practice and may come with strongly held beliefs founded on their experiences. Transforming may be difficult for anyone. Kim’s story is typical.

Kim is a student in a health disciplines course. She could be a nurse, a social worker, a dietitian, a physiotherapist, an occupational therapist, a chiropractor, a dental hygienist, a radiation therapist, or any other learner involved in providing health care. She could be a novice beginning her program of study or an expert continuing her education in her chosen field.

Kim has always loved school, at every level. She reads professional journal articles of interest and browses the newspaper daily. Since much of what she reads aligns with what she already knows, she seldom has reason to question. Recently, Kim decided to take an online course to, in her words, “keep her thinking.” For a course assignment, she was asked to present two perspectives on an issue that was important to her. She had difficulty even thinking of an issue to present. Her upbringing and education taught her to respect the printed word and not to second-guess those who “know.” One could describe Kim as content with her existing knowledge and beliefs.

To facilitate Kim moving ahead with the perspectives assignment, her instructor suggested that she consider the issue of “increasing scope of practice in your area of practice.” Kim appreciated her instructor’s idea, but secretly, she thought, “Who would disagree with that?” She did not see this as a contentious statement: there was only one “right” viewpoint, and it was an obvious one at that.

The first part of the assignment asked Kim to journal her beliefs and attitudes related to her identified issue. Her journal page remained blank. Kim’s intentions to complete her assignment remained just that—intentions. What could Kim’s online teacher (a practitioner of transformational learning) do to facilitate meaningful shifts in Kim’s perspectives?
In the late 1970s, Jack Mizerow began developing a theory of adult learning that he called transformational learning (1978). Transformational learning emerged as a process of critical reflection and rational discourse relating to personal experience. In essence, Mizerow (1981) defines transformational learning as critically reflecting on our assumptions and beliefs and then intentionally creating a new view of the world. O’Sullivan (1999) describes transformative learning as involving a deep shift in consciousness that changes a person’s view of his or her place in the world.

Mezirow’s theory comprises three dimensions: psychological (changes in how people understand themselves), convictional (changes in belief systems), and behavioural (changes in lifestyle) (Mizerow, 1997). The outcome of transformative learning is what Mizerow (1978) calls “perspective transformation,” which he has concluded rarely occurs. When it does occur, perspective transformation is usually triggered by a life crisis and results in a disorienting dilemma for the learner. This traumatic life event triggers the deep conscious reflection that underpins the critical examination that results in transformative learning. In sum, as learners consciously examine underlying views and assumptions of which they may have hitherto been unaware, their view of the world is transformed.

Mezirow claims that some learning experiences have such a strong influence on learners that they can affect all future learning. He writes about “meaning schemes”—beliefs, attitudes, and emotional reactions that are acquired uncritically during childhood. Meaning schemes are “meaning perspectives” that filter future perception and determine the meaning of future experiences (Taylor, 1998).

In much the same way that, in Piaget’s theory of child development, the processes of accommodation and assimilation occur
naturally, without need for critical thought, Mezirow argues that adult learners are easily able to fit some new experiences into their current meaning perspective or frame of reference. Other experiences, however, particularly personal crises or confusing issues, require reflection and dialogue with others before being incorporated into a transformed meaning perspective.

According to Mezirow (1981), transformational learning is fundamentally a rational and analytical process. In other words, learners change their viewpoint through an active process of critically reflecting on what they believe. Transformational learners need to identify their assumptions, values, and beliefs before they can consciously make a choice to see the world in a new way.

As with any theory, critique of transformational learning is ongoing. Taylor (1997, 2007), for example, questions whether the fundamentals of the model have been fully researched, suggesting that the original model has been applied repeatedly to different situations with limited attention to debate, critique, or building on others’ writing. As for whether context has been adequately addressed, Clark and Wilson (1991) assert that Mezirow’s emphasis on individual agency has resulted in the neglect of family, peer contexts, and culturally embedded values and mores. Merriam (2004) questions whether all adults can be expected to function at the level of cognitive function needed to reflect critically. She argues that the model is not broadly applicable in that it excludes those with limited ability to think critically and to engage in rational discourse. Some critics question whether perspective transformations actually do include psychological shifts. Tennant (1993), for instance, notes that the shifts or changes in world view described in the theory are based more on cognition than on psychology or emotion.

Responses to these and other critiques are also ongoing. Although Mezirow’s original conceptualizations were based on just one small grounded theory study of American women’s reflections following
their experience of returning to a community college (Marsick & Mezirow, 1978), the theory continues to endure and expand, offering “one of the most generative ideas for both practitioners and researchers” (Dirkx, 2011, p. 139). General publications such as the Journal of Transformative Education and The Handbook of Transformative Learning: Theory, Research and Practice (Taylor & Cranton, 2012) reflect how the theory is currently being debated, developed, and refined. Discipline-specific publications such as Transformative Learning in Nursing: A Guide for Nurse Educators (Morris & Faulk, 2012) reflect applications of the theory in health care education.

As transformational learning theory has continued to evolve, the discussions of educational theorists have been wide ranging, exploring such concepts such as humanism, emancipation, autonomy, equity, self-knowledge, participation, cultural spirituality (narratives developed within students’ contexts), positionality, and neurobiology—it has been found that the brain structure actually changes during the learning process (Grabove, 1997; Janik, 2005; Taylor & Cranton, 2012). Discussions addressing the role of emotions, relationships, social contexts, different cultural affiliations, creativity, and the arts continue to impact the evolution of the theory as well (Taylor & Cranton, 2012).

All variations of transformational learning theory emphasize characteristics of instructors and students, course content, learning environments, and instructional activities as important. The contribution of these factors to transformational learning is considered in the following sections. Of note, Taylor (1998) suggests that not all learners are predisposed to engage in transformative learning. The same can be said for teachers, not all of whom may feel comfortable with the goal of transformative learning. In addition, many adult learning situations do not necessarily lend themselves to transformative learning (Imel, 1998).
The Instructor’s Role in Transformational Learning

In the transformational learning context, the instructor “functions as a facilitator and provocateur rather than as an authority on subject matter” (Mezirow, 1997, p. 11) and is responsible for creating a learning environment that promotes trust and relationship building. This means encouraging “learners to create norms that accept order, justice, and civility in the classroom and respect and responsibility for helping each other learn; to welcome diversity; to foster peer collaboration; and to provide equal opportunity for participation” (p. 11). Mezirow takes this one step further: “The facilitator works herself out of the job of authority figure to become a colearner” (p. 11). The instructor or facilitator is also responsible for determining the content, or what Anderson, Rourke, Archer, & Garrison (2001) call the “trigger event” that initiates the transformative learning process. Educators attempting to elicit transformational learning create opportunities, both in and outside the classroom, for learners to participate in experiences that bring new insights. Without such experiences to test and explore new perspectives, it is unlikely that learners will fully transform (Taylor, 1998).

The Student’s Role in Transformational Learning

Taylor (1998) suggests that Mezirow places too much emphasis on the instructor, thus decreasing the importance of the student’s role in critical thinking and discourse leading to transformation. Indeed, as the theory has continued to evolve, theorists such as Kitchenham (2008) and Mezirow himself (2009) have stressed that the transformation comes from the creative and intuitive processes of the student (see also Boyd & Myers, 1988; Grabove, 1997). Boyd and Myers (1988) note that before learner transformation can occur, there may be a need for personality to be changed, consciousness expanded, and ability to
discern enhanced; the learner may even have to go through a grieving process. In other words, certain rational and emotional student actions may be essential to transformation (Imel, 1998).

Describing her own transformation as a home economist, McGregor (2004) notes that all transformed learners have their own stories: the transformative experience is a unique journey for each learner. The commonality in the role of the student is an active reflection on foundational assumptions, values, and beliefs. Students need to engage in challenging their conscious and unconscious views and to be open to seeing the world in a different way in order for transformation to be possible.

_The Role of the Instructional Environment in Transformational Learning_

Three teaching approaches are central to fostering emancipatory transformative learning (Freire & Macedo, 1995), all of which help form the learning environment and determine course content and instructional activities. First, the instructor must make critical reflection central, with the goal of helping learners to rediscover their own power and develop an awareness of agency to transform society and their own realities. Second, a liberating approach to teaching is necessary, an approach couched in “acts of cognition not in the transferral of information” (Freire & Macedo, 1995, p. 67). This is a “problem-posing” and dialogical methodology (p. 70). A third essential approach is that of nurturing a horizontal student-teacher relationship where the teacher works as a political agent and on an equal footing with students (Taylor, 1998, p. 8).

Mezirow (1997) suggests specific instructional techniques and activities to engage students in transformational learning, including journal writing, metaphorical thinking, life history exercises, learning contracts, group projects, case studies, and role playing. Taylor (1998)
agrees that reflective journalling, classroom dialogue, and critical questioning are learning activities that have the potential to help students transform.

According to Dirkx (2006), a holistic approach to transformative learning recognizes other ways of knowing (intuition, somatic knowledge) as well as the roles of feelings and relationships with others. Vital to the process of genuine transformation, therefore, are conversations with students about feelings they are experiencing and reasons for their specific decisions in the critical thinking process. The learning environment must be one in which students feel safe engaging in learning activities that require them to reflect on deeply held personal perspectives. If learners are expected to share their perspectives, a supportive learning environment is an essential precursor.

The power imbalance between students and teachers found in some instructional environments may prevent learners from freely expressing themselves. Even if the teacher is attempting to be a co-learner, the inherent power in the position of instructor might intimidate some students, leading them to acquiesce in the teacher’s belief system. Hart (1990) notes that Mezirow ignores the power differential in teaching relationships; if transformation is to occur, however, it is crucial to strive for a teacher-learner relationship in which the power differential is as minimal as possible.

Finally, the transformation that results from learner engagement in specific learning activities may be “enduring and irreversible” (Courtenay, Merriam, & Reeves, 1998). The transformation may go beyond an epistemological change in world view; it can also involve an ontological shift (Lange, 2004). True transformational learning can therefore be life changing for students. All parties involved in such a venture need to be aware of the potential upheaval that such learning may have for the students, the teachers, and others affiliated with them. Core views will be challenged and students may feel compelled to make life changes based on their learning. Such potentially transformative endeavours need to be engaged in with eyes open.
Transformational Learning

TEACHING ACTIVITIES AND STRATEGIES CONGRUENT WITH TRANSFORMATIONAL LEARNING

Transformational learning seeks above all to trigger new insights and to invite critical reflection. Although these goals may sound simple enough, they are not always easy to achieve. The following offers a variety of activities and strategies that educators can use to create attitudinal shifts in online learners.

Triggering New Insights

Transformative learning theorists acknowledge the power of a life crisis or a deeply disorienting dilemma to bring about significant changes in an individual’s perspective or way of viewing the world. The insights gained from these shifts in perspective can be life changing. The occurrence of such transformational events is not, however, predictable, and personal crises obviously do not form a routine part of the learning environment. All the same, educators can implement strategies that mimic the sort of fundamental questioning that triggers important new insights. The strategies often centre on requiring students to present topics from different points of view.

FORMAL DEBATE

Because debating requires students either to take on a perspective different from their own or to defend their own views on a topic, a debate can be effective teaching activity for helping students to identify their underlying beliefs, values, and assumptions on a topic, which is an essential beginning step in transformative learning. Adopting a perspective with which one disagrees can trigger a “crisis” and a resulting transformation.
Vandall-Walker, Park, and Munich (2012) give the example of an instructor of a trends-and-issues nursing class who uses debate as a teaching activity that flows through several weeks of the course and includes all students in the course as debaters. In the first week of the course, the students are presented with a list of 25 potential debate topics. In addition, topics not on the original list may be proposed by a group of students. Learners are asked to select from the list three topics that they would like to debate and to prioritize these in order of preference. Students are also given a debate schedule and asked to indicate any particular weeks of the course during which they would not be able fully engage in a debate. Working with the students’ choices of topic and the times the students are available, the instructor pairs students and assigns each pair a debate topic. One student in each pair is asked to take the pro side and the other the con side, and the date that the debate will begin is assigned.

Debates are run on a weekly schedule, with one student pair assigned to each week of the course. On the first day of their assigned week, each student in the pair posts his or her side of the debate on a specific discussion forum. Three days later, on the same forum, the two students post their rebuttals to the opponent. The rest of the class is then invited to comment. On the last day of the week, each debater posts a summary statement. Finally, each member of the pair is asked to prepare an individual self-evaluation of his or her performance and experience in the debate and to email the self-evaluation to the instructor.

The debate may be an unsettling experience, even a trigger event, for the students, particularly those who have never participated in a formal debate. Arguing a position in a debate that does not align with one’s personal beliefs can provoke anxiety; students are forced to consider perspectives that challenge their own positions.

While instructors do not participate in the debate, they do engage with the students in a general discussion forum about debate and in individual email interactions to attempt to moderate any anxiety...
before and during the debate process. Debate learning activities are not graded, and no winners or losers are declared. The learning outcomes of the debate are gaining knowledge of course content and learning to express an opinion regardless of whether it is the student’s held belief. As part of the debate learning activity, students are introduced to the concept of fallacies of logic and are encouraged to identify fallacies and perhaps to use them when they feel that they do not have strong arguments for their position. At the conclusion of the activity, instructors are encouraged to examine their own perceptions of and views on the use of debates (Park et al., 2011).

As a caution, some might object that obliging students to act in ways that run contrary to their core beliefs—such as expecting them to debate against their own opinions—is unethical. However, the ability to view an issue from more than one side is fundamental to personal and intellectual growth. The transformational learning process may thus require students to enter a state of disequilibrium in which they critically examine their most firmly held values and beliefs. Formalized debate in online courses is one way to achieve this goal.

**ONE-MINUTE SELF-DEBATE**

For this activity, students are given the following directions for a short solo debate:

1. Listen to the podcast about ________ [a selected course topic], available at ________.

2. Consider the following statement: ________.[The instructor provides a statement related to the podcast that includes at least two obviously different perspectives.]

3. Agree with the statement and write down one point of support for the affirmative position.
4. Disagree with the statement and write down one point of support for the negative position.

5. Rebut your point of support for both the affirmative and negative positions. Repeat this process several times.

6. Share your best point with the class on the online discussion forum created for this purpose.

This shorter version of an online debate learning activity achieves some of the same goals as a formal debate: it helps students to consider both their held viewpoint and alternative perspectives on challenging topics. To achieve this, students need to reflect on what they believe about a topic and consider how others may see this topic differently. Because learners do the one-minute debate privately, they may, through honest reflection and self-examination, uncover deeply held perspectives that they may have been reluctant to share publicly. Additionally, the one-minute debate requires less organizational time on the part of the instructor than the formal online debate described above. The main drawback of the one-minute self-debate is that classmates are not part of the learning activity and shared learning is less likely to occur.

MOOT COURT

Few experiences are as life changing as those that play out in courtrooms. Defence attorneys and prosecutors present arguments that can deeply impact individuals and their families. Impartial judges are expected to weigh evidence that may challenge their own personal beliefs and assumptions. Judges’ verdicts must take into account both sides of an argument and apply their knowledge of the law to render a decision.

The courtroom process can be transferred to a “moot court” activity focusing on a relevant health care issue such as assisted suicide.
Online students are randomly assigned to the role of defence attorney, prosecutor, and judge. This way, students may find themselves in the position of preparing a life-saving defence for an individual accused of an action that they find abhorrent—a situation that could trigger a transformative process. Defence attorneys and prosecutors must prepare their cases, and the judges their verdicts, within an instructor-specified time limit. Students share their cases and verdicts online in written or video format. Teachers may wish to build in opportunities for debriefing, since personal memories related to the justice system could resurface as students engage in the activity.

**PAIR-SHARE: TWO PEOPLE, FOUR VIEWS**

For this activity, students are invited to read a scholarly article on a course topic and then to email another student to organize a pair-share discussion on this topic. Students can use online conferencing, e-meeting resources, instant messaging, Skype, or another avenue of communication for their pair-share collaboration. Students reflect on their own perspective on the article, contemplate alternative views on the topic, and then share with their partner at least two viewpoints related to the topic. Instructors can encourage students to practice active listening when their partner is sharing. At the conclusion of the pair-share discussion, the students reflect on their own perspectives and those of their partner and journal about what they discovered.

**Inviting Critical Reflection**

Before a shift in attitude can be expected to occur, learners must critically reflect on assumptions they believe are true. Because challenging these assumptions, at both a cognitive and an emotional level, can be difficult, the process is unlikely to be spontaneous. Instead, instructors must provide learners with opportunities to question their views on
specific ideas or issues. Activities in which no “right” or “wrong” interpretations exist can stimulate critical reflection.

**METAPHORICAL THINKING**

Since metaphors can encourage critical reflection, introducing students to a metaphor related to a course topic can expand their perspectives and contribute to transformational learning. For example, on the topic of mentoring, the metaphor of a garden as an effective mentoring relationship could be used. If the class is related to leadership, a leader might be seen as the ringleader in a circus. After the metaphor is introduced, students are asked to draw on what they have learned about the topic in the class to write a short comment that extends the metaphor. Each comment begins with a phrase provided by the instructor, such as “An effective mentor-mentee relationship is like a garden because . . .” or “An effective leader is like the ringleader in a three-ring circus because . . .” The student comments are then shared with the class in a discussion forum created for this purpose. A general class discussion evolves from the postings of the comments on the metaphor. The seemingly simple metaphor exercise encourages students to reflect more deeply on a given topic and how it may relate to them.

**WHICH PATIENTS WOULD I CHOOSE?**

Deeply held values, whether we are aware of them or not, are our blueprints for action. Activities that cause students to examine their values are essential to transformational learning. This exercise can facilitate a values examination.

To begin, the instructor devises a one-page list of approximately 20 patients who have fictitious names and short bios and who require care in the field in which the learners are (or will be) employed. For
example, if the class comprises a group of undergraduate student nurses, the list could include bios like the following:

Bill Barker  A 57-year-old gruff-talking man who has been admitted for prostate enlargement and follow-up examinations. Bill often swears and has been noted to speak roughly to his wife, who visits regularly.

Jane Ogdon  A 48-year-old woman who has completed treatment for breast cancer and has been admitted for reconstruction surgery. Her partner, Mary, visits regularly.

Elsie Paul  A 89-year-old woman who has dementia and has been admitted because she has fallen often at home. Her children are not able to help with her care, so she is awaiting placement in long-term care.

Sam Slip  A 28-year-old man who lives on the streets and has been admitted for liver problems and treatment of malnutrition.

Cammy Jones  A quiet and withdrawn teenager who has been admitted because of extreme weight loss and suspected anorexia and bulimia.

Students are given the list of bios and asked to select the five patients they would choose as health care professionals if they had the option to choose. Of course, as health care professionals, we usually do not have this choice, but for the transformative purposes of this exercise, students are asked to make choices. They are also asked to identify five patients they would choose not to care for if they had a choice. They then consider why they made the choices they did and record any common themes in their choices. After working on their choices individually, students form small groups and share their
observations about their choices as well as what they learned about their once “hidden” values and biases.

This learning activity works effectively online since students receive the bio list in digital form and can engage in either a real-time discussion via e-meeting software or an asynchronous discussion forum. Students find that this learning activity reveals conscious and unconscious beliefs and values that may influence the care they provide. Recognizing these values and beliefs can be an initial step in transformational learning.

*From the Field: “The Paths I’ve Walked”*

Sharon Moore created an arts-based pedagogical activity called “The Paths I’ve Walked,” a slide show with images, primarily of nature, set to a tranquil piece of music. Software such as Moviemaker can be used to create such a presentation. In Sharon’s case, the intent of this practice is to help students understand the characteristics and tenets of qualitative research. She was inspired to create the slide show while writing a graduate course on advanced qualitative methods. During her preparations, she read an article by McAllister and Rowe (2003), who write, “Being a qualitative researcher involves attributes such as compassion, passion, integrity, tolerance of ambiguity, willingness to play with ideas, knowledge and inquiry, commitment to viewing the social world from the viewpoints of the people being studied, valuing of detail, and willingness to inject something of themselves into the research process and its outcomes” (p. 296). The authors suggest implementing creative teaching approaches using narrative, poetry, dance, film,
music, and photographs.

Sharon’s four-minute presentation is included via a link near the beginning of the online course. Students are asked to view the presentation, respond in a discussion forum to some related questions that Sharon has incorporated into the presentation, and make some observations about qualitative research based on their classmates’ responses.

Sharon has received many positive responses from students about the presentation, which has had some unintended side-effects. The presentation usually comes at a time in the semester when the workload is heavy and the students are feeling stressed. One student remarked, “Thank you Sharon for sharing this slide show with us! I found the images and the music to be very calming and inspirational.” Another student wrote, “It forced me to stop and appreciate the world around me in the midst of a hectic schedule.”

But the slide show also accomplishes Sharon’s primary purpose. One learner remarked, “We each bring to our interpretations of this slide show our own experiences and beliefs. There is not a right or wrong interpretation. All of our contributions are important. The richness in this information is that it considers the perceptions of all of us. Together all this information gives the qualitative researcher a rich and robust collection of information.” Still another learner made this observation: “I viewed the slide show late at work one night when I thought the office was empty and accordingly turned the sound quite high. Within minutes a few nurses and clerical staff were drawn from hither and thither by the haunting Celtic melody. As we watched
the slide show together I was struck by how one image affected so many people differently or how one image elicited a similar response. It occurred to me that everything we do in qualitative research in contextually based.”

CONCLUSION

Transformational learning is about shifts in attitude. Health care students all bring deeply seated and well-established beliefs and assumptions to their learning. Facilitating genuine change in students’ views of the world is not easy. Teachers must provide content and experiences that have the potential to trigger new insights and invite critical reflection. Jack Mezirow, a key contributor to the development of transformational learning theory, emphasizes the importance of providing challenges within the educational process. Teachers who challenge learners provide them with opportunities to question commonly accepted truths and to reflect critically on points of view that are different from their own.

Ultimately, however, it is learners themselves who must be open to new perspectives. Although the process of shifting attitudes can be exciting, it can also be disorienting. Students must be active and willing participants throughout the process of transformation.

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