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TRANSFORMATIVE LEARNING AND THE POWER OF EXPERIENCE
CONTEXTUALIZED IN TERTIARY-LEVEL STUDY ABROAD

by

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B.A. May 2017, Gettysburg College

A Thesis Submitted to the Faculty of
Old Dominion University in Partial Fulfillment of the
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ABSTRACT

TRANSFORMATIVE LEARNING AND THE POWER OF EXPERIENCE CONTEXTUALIZED IN TERTIARY-LEVEL STUDY ABROAD

Colleen Michaela Kolb
Old Dominion University, 2020
Director: Dr. Chris R. Glass

The study abroad experience for many students is ineffable by nature. Teasing this apart and understanding how to maximize student learning abroad can lead to more enriched and potentially transformative experiences. There is little training offered to faculty and administrators at most American institutions about how to integrate study abroad learning into the wider higher education curriculum before, during, and after a global experience. By utilizing transformative learning theory (TLT) and experiential learning theory (ELT), this thesis provides a *space for thought* to conceptualize study abroad as a fully integrated part of the college curriculum that enhances the learner experience and the journey towards fulfilling the vision of a liberal education. TLT consists of a ten-phase process that is enhanced by critical reflection and intentional scaffolding to support the engaged learner. ELT suggests a multi-mode cyclical structure to learning through experience that can be deepened over time. The two theories complement one another well when the educator understands both and realizes how pairing TLT with ELT can maximize the power of experience. There is a particular focus on understanding the learner experience and how educators can best facilitate learning. Finally, suggestions are presented for integrating TLT and ELT into practice within tertiary-level study abroad.

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This thesis is dedicated to my Mom and Grandad.
I finished for you both.

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TABLE OF CONTENTS

	Page
LIST OF FIGURES	VIII
Chapter	
I. INTRODUCTION.....	1
II. TRANSFORMATIVE LEARNING.....	7
DISORIENTING DILEMMAS	11
PHASES OF TRANSFORMATIVE LEARNING.....	14
REFLECTION IN TRANSFORMATIVE LEARNING	19
TRANSFORMATIVE LEARNING IN A STUDY ABROAD CONTEXT.....	22
THE EDUCATOR’S ROLE	24
TRANSFORMATIVE LEARNING AND ETHICAL BOUNDARIES	29
THE (DIGITAL) FUTURE OF TRANSFORMATIVE LEARNING	34
SUMMARY	36
III. EXPERIENTIAL LEARNING	38
THE EXPERIENTIAL LEARNING CYCLE.....	42
THE EXPERIENTIAL LEARNING SPIRAL	45
THE EDUCATOR’S ROLE	47
SUMMARY	53
IV. OVERLAPPING AND INTEGRATING TRANSFORMATIVE LEARNING THEORY AND EXPERIENTIAL LEARNING THEORY IN PRACTICE	55
TRANSFORMATIVE LEARNING & EXPERIENTIAL LEARNING OVERLAPS	55
A FACULTY-LED SEMESTER-LONG PROGRAM IN PRACTICE.....	58
CONCLUDING THOUGHTS.....	62
REFERENCES	64
VITA.....	72

LIST OF FIGURES

Figure	Page
1. The Experiential Learning Cycle	43
2. The Experiential Learning Spiral.....	46
3. Educator Roles and Teaching Around the Learning Cycle	52

CHAPTER 1

INTRODUCTION

Structured education is intensely bound with curriculum. The word *curriculum* is derived from an ancient Latin metaphor referring to a racecourse on which people would compete in chariot races (Tagg, 2018). Curriculum, a word which is deeply intertwined with how many people think of education, is paralleled to running sprints along a track. There is a starting point and a predetermined finish line. It does not allow for deviation. This way of thinking has percolated too far into the modern educational system. I challenge those in the field of education to instead consider curriculum as a *learning journey* without a predetermined path or finish line. Learners and educators alike impact the learning journey and can act more intentionally when learning theories are understood and applied.

Transformative learning theory and experiential learning theory are explored in this thesis through the context of study abroad. There is a particular focus on understanding the learner experience and how educators can best facilitate learning. The study abroad experience for many students is ineffable by nature. Teasing this apart and understanding how to maximize student learning abroad can lead to more enriched and potentially transformative experiences. There is little training offered to faculty and administrators at most American institutions about how to integrate study abroad learning into the wider higher education curriculum before, during, and after a global experience. My goal in the following chapters is to create a *space for thought* to conceptualize study abroad as a fully integrated part of the college curriculum that enhances the student experience and journey towards fulfilling the vision of a liberal education. Educators of all kinds – from full-time faculty to international educators – are an integral part of this conceptualization.

Montrose (2002) observed that while the importance of encouraging study abroad goes relatively unchallenged by educators, “in many cases there is a lack of integration between the experience and the learning or educational value that can be derived from it” (p. 14). Integrating the experience itself and the potential learning in the experience calls for tuning into the cyclical relationship between theory and practice. When done well, intentionally utilizing study abroad for student learning reaches well beyond the international experience. Therefore, transformative learning theory and experiential learning theory must be intentionally used in practice by learners and educators alike.

Before diving deeper into both transformative learning theory and experiential learning theory, the basis of learning itself must be framed. Learning, as it is discussed in the following chapters, is based upon the acquisition of knowledge and experiences that give the learner a deeper understanding of the world (Keeling, 2006). Learning is thus framed in a way that goes beyond pulling facts from the educator and planting those facts, as they are, into the mind of the learner. Instead, information and experiences can be shaped and molded like clay.

A metaphorical example using clay demonstrates my points with how learning is framed in the subsequent chapters. Imagine a potter hands a piece of clay to another. The recipient of the clay keeps it in the same form and shape in which she receives it. She adds to her supply of clay and her collection grows over time. Each piece looks the same; the recipient does not change them. With each piece of clay she receives, she gains more knowledge, but does not develop as a potter – as a learner. Educators may recognize this process as information transmission.

Similarly, a potter may already possess a collection of clay. After visiting a gallery, the potter realizes she can do a myriad of things with her clay: coil it, pinch it, throw it, score it, carve it, even fire it in a kiln. With that discovery, she manipulates the clay she once received

into forms of her own with techniques that change over time as she experiences new things. The potter's new forms and creations represent her continued learning. In her twists and pinches of the clay, she makes meaning of the knowledge – the clay – she originally received.

Next, take a potter who excels at making cups. He has made ceramic cups all his life. He was raised in a community of potters who have also solely made ceramic cups. Therefore, cups are all he has seen and known to make with clay. One day, he travels to a new community and realizes that teapots can be made with clay. The material used – the clay – is the same for making cups as it is for making teapots. The potter comes to understand that he, too, could make teapots. However, he determines that he is perfectly content with making cups, and only cups, in the future. Making cups has not done him any harm, and he decides for himself that he will remain happy with his cups and does not want to discover how to mold his clay into teapots. A learner knowing they are capable but choosing not to continue their learning is different from a learner who does not believe they have more to learn. Scholars explain that “those individuals who believe that they can learn and develop have a *learning identity*” (Passarelli & Kolb, 2012, p. 155; Molden & Dweck, 2006). Transformative learning requires the design of experiences intended to foster the development of a learning identity, as well as learners engaged in development of their identity as a learner.

Further, Fenwick's (2000) work describes five contemporary perspectives of cognition. Two of them are necessary for a holistic view of transformative learning as I present it: the constructivist and psychoanalytic perspectives. The constructivist approach tends to be used most widely in adult learning and higher education (Fenwick, 2000; MacKeracher, 2012). Through the lens of constructivism, Fenwick (2000) describes the individual learner as “the central actor in the drama of personal meaning-making” (p. 248). From a constructivist perspective, “the learner

reflects on lived experience and then interprets and generalizes this experience to form mental structures [...] that can be represented, expressed, and transferred to new situations” (Fenwick, 2000, p. 248). This perspective makes sense when considering both transformative learning and experiential learning theories theoretically.

However, some scholars suggest that the messiness of a transformative learning process in practice is not encompassed in the constructivist view (MacKeracher, 2012). The psychoanalytic perspective suggests that individuals’ “knowledge dilemmas unfold through struggles between the unconscious and the conscious mind, which is aware of unconscious rumblings but can neither access them fully nor understand their language” (Fenwick, 2000, p. 251). Some learners’ experiences leading to transformative learning seem to originate more from the unconscious mind rather than from intentional thinking about their experiences (MacKeracher, 2012). For this reason, both perspectives should be considered when utilizing transformative learning theory and experiential learning theory.

Throughout this thesis, I refer to *the educator* and *the learner*. I do this for two main reasons. First, the terms are clear and simple. Second, they are inclusive. A *learner* can learn beyond their role as a student. A person in a faculty position can still be a learner. A person who is not enrolled at an educational institution can still be a learner. Similarly, an *educator* is not always someone employed as a faculty member. A host family or administrative staff member can also take on the role of the educator. Both transformative learning theory and experiential learning theory go beyond the traditional classroom walls and thus require inclusive terms for the people discussed in relation to the theories. In most cases, learners in a study abroad context *are* students, and most educators *are* higher education faculty or staff. Nonetheless, I generally use *learner* over *student* to demonstrate the wider applicability.

I am also intentional about how I use the terms *education abroad* and *study abroad*. Education abroad can refer to many international experiences, including service learning, coursework, internships, and study abroad. *Study abroad* is a subtype of education abroad that involves a student making academic degree progress in a different country from the home institution (The Forum on Education Abroad, n.d.). While *education abroad* can be used as an umbrella term that encapsulates study abroad, I primarily use the term *study abroad* in the forthcoming chapters to indicate my focus on that context specifically. This is not to say that transformative learning and experiential learning do not happen in other types of education abroad. I focus on study abroad for the scope of this work because of how likely the educator is to play a central and stable role in the learner's experience compared to other types of education abroad. I have found the educator's role to be critical in increasing the potential for both experiential learning and transformative learning.

I also wish to comment on the use of gender within these chapters. The learning journey is individualistic and personal. The learner and the educator have personhood. They have multifaceted identities that should not be disregarded in the context of the learning process. However, no single pronoun can accurately represent all individuals, and it would be misrepresentative to select one binary gender identity to use throughout this thesis. Therefore, when referring to a person – most typically *the learner* or *the educator* – I use they/them pronouns. This writing choice was made with intention. My writing applies to learners and educators who identify with any gender and by any pronouns. Thus, when I refer to a singular learner or educator, 'they' are an individual person referred to with inclusivity of all gender identities.

Chapter 2 goes on to discuss transformative learning theory. Experiential learning theory is discussed in Chapter 3. Both theories are integrated in Chapter 4 with discussion of how transformative and experiential learning overlap in practice within the study abroad context. The educator's role and engagement of the learner are highlighted throughout.

CHAPTER 2

TRANSFORMATIVE LEARNING

Jack Mezirow's transformative learning theory (TLT) came about when his wife, Edee, returned to school as an adult in the 1970s. Upon her continued education, Mezirow noticed interesting characteristics of Edee's learning experience and found similar things occurring with other adult learners. Casual observations turned into a large-scale study where Mezirow explored the learning experiences of women returning to higher education in adulthood, which resulted in the framework for the theory of transformative learning.

Mezirow's theory is based in the field of adult learning. It can be applied across adulthood and is notably different than adult learning in general as well as how learning occurs in childhood. Daloz (1986) suggests that transformative learning often occurs when a learner transitions between one developmental stage to the next. For example, traditionally aged college students make the transition from adolescence to adulthood during the transitional stage of development known as *emerging adulthood* (Arnett, 2000). Emerging adulthood refers to the stage of development between adolescence and adulthood in which people are trying to figure out their role as an autonomous adult. Consequently, this chapter will present transformative learning theory through a focused lens on emerging adults in higher education.

In setting the stage further, it is important to note that the phenomenon of transformative learning is relatively rare (Dirkx, 1998). Even within higher education where learners are more likely to be in a transitional stage, "it would be naïve and silly for us as educators to think that we can always foster transformation" (Dirkx, 1998, p. 10). Even seasoned and well-practiced educators fostering transformative learning may not regularly see transformation occur in the learners they teach.

It is difficult to succinctly define transformative learning because of its complexity and nuance. In an attempt at simplicity, it is a process of adult learning that involves a deep change in perspective resulting in changes of thought and behavior for the learner. Mezirow's own words add to this definition:

Transformative learning refers to the process by which we transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action. Transformative learning involves participation in constructive discourse to use the experience of others to assess reasons justifying these assumptions, and making an action decision based on the resulting insight. (Mezirow, 2012, p. 76)

Many of the terms Mezirow used in this explanation will come up again throughout this chapter.

Scholars of transformative learning make it clear that the theory is based in constructivist assumptions from its origin (Cranton, 2016; Cranton & Taylor, 2012; Mezirow, 1991). By these assumptions, meaning is constructed within learners based on their life experiences and discourse with others as opposed to learners gathering the "right answers" to meaning from external sources. In the words of Cranton and Taylor (2012), two well-regarded and long-standing scholars in the transformative learning field, "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" (p. 8). Transformative learning is a process of making and remaking meaning based upon our

experiences and how we become aware, evaluate, explore, and readjust our perspectives. The process ultimately leads to a substantial shift in meaning perspective.

Before we continue, it is useful to define key terms used in the discussion of transformative learning theory, namely: *meaning perspective*, *frame of reference*, *habit of mind*, and *point of view*. First, a *meaning perspective* is the structure of deeply held beliefs, values, and assumptions that we have collected throughout our lives and that inform the way we understand the world and our experiences within it (Mezirow, 1991; 2012). The learner may go their entire life without consciously acknowledging their meaning perspective nor questioning it. Transformative learning comes into the picture when the learner questions and is confused or unsettled from their meaning perspective, then intentionally and critically reflects on their experiences in what I will call a *learning journey*.

The terms *meaning perspective* and *frame of reference* can be used interchangeably. The subtle difference is that *meaning perspective* tends to be used in reference to a single learner whereas *frame of reference* is used more often when referring to a more collective set of paradigms. Mezirow (2012) reiterates this point by explaining that “our frames of reference often represent cultural paradigms (collectively held frames of reference) – learning that is unintentionally assimilated from the culture – or personal perspectives derived from the idiosyncrasies of primary caregivers” (pp. 82-83). When a learner leaves the place where their frame of reference was based, such as by studying abroad, it gives them greater opportunity to explore outside of their engrained culture and meaning perspective. In turn, experiences of study abroad may lead to greater chances of shifting the learner’s meaning perspective.

A *habit of mind* is a habitual way of thinking or feeling that is engrained in what the learner knows and is ritualistically comfortable with thinking or feeling (Cranton, 2016;

Mezirow, 2012; Morgan, 2010). Our *habits of mind* are the way we use our meaning perspectives to interpret our experiences. “They include distortions, prejudices, stereotypes, and simply unquestioned or examined beliefs,” and as Cranton (2016) adds, “maintaining a meaning perspective is safe” (p. 18). A learner expresses their habit of mind, which operates outside of conscious awareness, through what we can consciously recognize as their *point of view* (Mezirow, 2012). That learner can alter their point of view “by trying on another’s point of view” (Mezirow, 2000, p. 21) even though they cannot try on another person’s habit of mind (Kitchenham, 2008). We can use our awareness of this terminology and how it is used to further examine the transformative learning literature.

Mezirow’s work is perhaps the most well-known and commonly cited in the literature on TLT, emphasizing a shift in meaning perspectives through critical reflection in a rational process of learning that is either objective or subjective (Dirkx, 1998; Dirkx, Mezirow, & Cranton, 2006; Mezirow, 1991). However, Mezirow’s original theory was not received without criticism. In the nearly three decades since he published his first book detailing transformative learning theory, scholars have argued that Mezirow puts too much emphasis on the rational process of learning and does not allow room for the social, emotional, and perceptive side of learning (Cranton, 2016; Dirkx, 2008; Kitchenham, 2008; Mälkki, 2010). He has been receptive to the criticism, though Mezirow has largely maintained his original line of thought. Knowing the theory has received pushback, readers should be aware of alternative academic perspectives on TLT such as those of Freire, Daloz, Boyd, and Dirkx.

In Freire’s version of transformative learning, consciousness-raising is key to analyzing and forming questions that in turn work towards people’s personal and social liberation (Dirkx, 1998; Freire, 1970). Alternatively, Daloz (1986) frames transformative learning as occurring

most frequently “in between” developmental phases when new meaning structures are necessary to “help [learners] perceive and make sense of their changing world” (Dirkx, 1998, p. 5). Boyd’s line of thought within transformative education is centered in Jungian and developmental perspectives and focuses on emotional-spiritual individuation learning connected by powerful symbols (Boyd & Myers, 1988; Dirkx, 1998). In addition, Dirkx has significantly contributed to transformative learning theory. In Dirkx’s view, transformation is done through *subjective reframing* (rather than objective reframing) and keeps a focus on self-identity through an integration of mind and soul work (Dirkx, Mezirow, & Cranton, 2006; Cranton, 2016; Dirkx, 2008). Each of these lines of thought are valid in the literature and offer unique contributions to the field.

For the scope of this work, my discussion of transformative learning is grounded in Mezirow’s articulation of transformative learning intermixed with some aspects of the work of other researchers who followed Mezirow’s line of thought. I agree with Mezirow that transformative learning theory is both objective and subjective in nature; it is not one or the other. In many senses, it is messy. We will begin to explore some of the messiness with disorienting dilemmas.

Disorienting Dilemmas

The cornerstone catalyst of transformative learning is the occurrence of a *disorienting dilemma*. Mezirow originally coined this term when noticing a deep shift in perspective in the women he studied upon their return to college. The perspective shifts Mezirow observed were more than casual realizations for the women; they involved deeper questioning of personal realities that were oftentimes confusing or uncomfortable. Disorientation occurs when someone learns or discovers new information at such a deep or profound level that it shifts their previously

engrained assumptions and beliefs (Cranton, 2016; Feller, 2015). One scholar explains that a disorienting dilemma “is far more than cognitive dissonance, as it involves the full self and orientation to the world. [Rather, the] deeply felt dilemma of competing worldviews challenges the self on many levels at once” (Feller, 2015, p. 67). Competing worldviews, as Feller describes, only come to exist through new life experiences.

Putting oneself into situations where it is more likely to experience new things – whether it be through observation, conversation, direct engagement, or a combination of those methods – naturally makes it more likely for a learner’s worldviews to come into question. This is a major reason why study abroad can be a prime precursor to engaging in a disorienting dilemma, as discussed throughout these chapters: there are naturally more opportunities to engage difference and become aware of values or viewpoints unlike those present in the learner’s home culture and context.

Most researchers of transformative learning theory indicate that the occurrence of a disorienting dilemma directly precedes the remaining phases of transformation without a gap in time. Others suggest that a disorienting dilemma could occur and then be put into mental hibernation, so to speak, until the learner revisits the disorientation and then chooses to engage with it towards transformation (Nohl, 2015). Regardless of the timing and order, while the occurrence of a disorienting dilemma can be a profound time of realization and learning, disorienting dilemmas can also go undetected by the person experiencing them. If undetected by the individual (*the learner*) and not recognized and facilitated by another individual – most especially by an educator with a keen eye for transformative learning potential (hereby referred to as *the educator*) – the door into a transformative learning journey based upon that particular disorienting dilemma will likely be lost (Cranton, 2016; Feller, 2015; Mezirow, 1991; Mezirow,

2000). Thus, experiencing a disorienting dilemma does not mean that a transformative learning experience is a surefire successor to that disorientation.

In other words, engagement with a disorienting dilemma *may* lead to a transformation of perspective and engrained worldview for the individual, but such transformation is not a guarantee in the learning process (Cranton, 2016; Dirkx, Mezirow, & Cranton, 2006). The learner can experience disorientation, recognize it, and choose not to act upon it. The learner may also experience disorientation without being consciously aware of its presence. MacKeracher (2012) puts it this way: “I assume that throughout my life I have ignored many inconsistencies, challenges, and disconfirmations because I was too busy to notice or too distracted by other experiences” (p. 347). By acknowledging that a disorienting dilemma in itself does not guarantee any sort of transformation, we are reminded both of life’s complexities and that transformative learning is not magical – it does not simply occur without work, awareness, and willingness to engage in the learning journey.

Furthermore, in a scholarly debate of TLT viewpoints between Dirkx, Mezirow, and Cranton in 2006, the scholars agreed that experiencing a disorienting dilemma – or even multiple disorienting dilemmas – is not an uncommon experience to occur within the lifetime of the average person. Dirkx goes on to explain:

We may not have accepted the invitation implicit in such experiences to engage in a deeper form of learning about ourselves or our world, but it seems apparent that these experiences are not reserved for an elite few. Regardless of whether we accept and embrace the invitation or turn away from it and ignore its messages, we know we have been through something important and potentially quite profound in our lives. (Dirkx, Mezirow, & Cranton, 2006, p. 132)

This discussion underlines that even as the first piece of a much longer transformative learning journey, a disorienting dilemma on its own is not insignificant.

In the case that disorientation does lead to something further, a disorienting dilemma is the first step in a transformative learning journey. Feller (2015) notes that “when facilitated well, a disorienting dilemma can prompt a journey, leading a student through a truly life-changing process” (p. 69). Beyond disorientation, Mezirow’s presentation of the theory denotes ten phases of transformative learning. In the next section, I present those original phases and how they have been tweaked by Mezirow and other TLT scholars. These phases inform educators how to recognize and facilitate the transformative learning process in infinite contexts, including study abroad.

Phases of Transformative Learning

Mezirow (1991) outlined ten phases of transformative learning. Learners who experience these phases may have gone through perspective transformation and a fundamental change in their frames of reference (Mezirow, 1991). It must be noted that it is not necessary for all phases to be experienced altogether, nor in a linear fashion, in order for transformative learning to occur (Cranton, 2016; Kitchenham, 2008; Mezirow, 1991 & 2000). Mezirow has since revisited his original phases and revised them, albeit slightly (Mezirow, 2012), and Cranton (2002, as cited by MacKeracher, 2012) has also synthesized the phrases and reworked them to include snippets of additional researchers’ work. Table 1 shows these three versions of the phases side by side for ease of comparison. When deep meanings and perspectives become clarified for learners, Mezirow (2012) claims that the corresponding transformations will have followed some form of the ten phases.

Table 1*Comparison of Transformative Learning Phases and Segments*

Cranton (2016) & Feller (2015)	Mezirow (1991, pp. 168-169)	Mezirow (2012, p. 86)	Cranton (2002, as cited by MacKeracher, 2012)	
Segment: Awareness of a Disorienting Dilemma	Phase 1	A disorienting dilemma	A disorienting dilemma	Experiencing an event in society that disorients one's sense of self within a familiar role
	Phase 2	Self-examination with feelings of guilt or shame	Self-examination with feelings of fear, anger, guilt, or shame	Engaging in reflection and self-reflection
Segment: Evaluation of the Dilemma	Phase 3	A critical assessment of epistemic, sociocultural, or psychic assumptions	A critical assessment of assumptions	Critically assessing the personal assumptions and feelings that have alienated self from traditional role expectations
	Phase 4	Recognition that one's discontent and the process of transformation are shared and that others have negotiated a similar change	Recognition that one's discontent and the process of transformation are shared	Relating discontent to similar experiences of others; recognizing the shared problems
Segment: Exploration	Phase 5	Exploration of options for new roles, relationships, and actions	Exploration of options for new roles, relationships, and actions	Identifying new ways of acting within the role
	Phase 6	Planning of a course of action	Planning a course of action	Building personal confidence and competence
	Phase 7	Acquisition of knowledge and skills for implementing one's plans	Acquiring knowledge and skills for implementing one's plans	Planning a new course of action
	Phase 8	Provisional trying of new roles	Provisional trying of new roles	Acquiring the knowledge and skills necessary to implement this new course of action
Segment: Recalibration	Phase 9	Building of competence and self-confidence in new roles and relationships	Building competence and self-confidence in new roles and relationships	Trying out the planned action and assessing the results
	Phase 10	A reintegration into one's life on the basis of conditions dictated by one's new perspective	A reintegration into one's life on the basis of conditions dictated by one's new perspective	Reintegrating into society with the new role behaviors and with new assumptions and perspectives

According to Feller (2015), it is most critical for educators to be aware of the first two phases: the disorienting dilemma and the learner's self-examination of anger, fear, guilt, or shame related to the disorientation. A learner who navigates initial awareness and evaluation of a disorienting dilemma without the facilitation of an educator may ignore the disorientation and become mentally stuck in a place of cultural backlash from the disorientation. Feller (2015) also notes that the process is easier after experiencing the first two phases of transformative learning, though I would amend that statement in favor of the process becoming less *uncomfortable* for the learner in the subsequent phases.

Scholars such as MacKeracher (2012) note that about half of Mezirow's phases could be considered active or action phases of learning. Other scholars agree with MacKeracher and suggest that the ten-phase theory can be categorized or condensed into four segments of transformation, which are also shown in Table 1. The four segments of the process are as follows: *awareness of a disorienting dilemma*, *evaluation of the dilemma*, *exploration*, and *recalibration* (Cranton, 2016; Feller, 2015). Conceptualizing transformative learning theory by segments is especially useful to educators trying to guide learners who are not moving through the phases in a linear manner or those who have perhaps dabbled in multiple phases at once.

The first segment, *awareness of a disorienting dilemma*, covers Phases 1 and 2 of Mezirow's (1991; 2012) list. The previous section of this chapter goes into more depth about awareness of a disorienting dilemma. The segment following covers *evaluation of the dilemma* and Phases 2-4. Notice the potential overlap of Phase 2 between the first and second segments. Of *evaluation of the dilemma*, Mezirow (1991; 2012) emphasizes intentional reflection and recognizing reflective insights. Critical reflection is central beginning in this segment and continuing through the remaining process.

Exploration includes Phases 5-8. In this segment, the learner is both exploring options and planning actions. Action is key in turning learning into transformative learning. There must be some sort of behavioral change (action) to lead to a deep shift in perspective that is characteristic of transformative learning (Cranton, 2016; Mezirow, 1991). In Mezirow's (2012) words:

A mindful transformative learning experience requires that the learner make an informed and reflective decision to act on his or her reflective insight. This decision may result in immediate action, delayed action, or reasoned reaffirmation of an existing pattern of action. Taking action on reflective insights often involves overcoming situational, emotional, and informational constraints that may require new learning experiences in order to move forward. (p. 87)

The action taken in a learner's transformative learning process should be a facilitated experience to minimize any potential harm. The facilitators involved should be trained and practiced educators. Mezirow's (1991) work also established that an educator cannot decide on the specific outcome of transformative learning for their students; doing so would be considered indoctrination as opposed to transformation (Cranton, 2006). Instead, educators can facilitate students on a journey of critical reflection which has the potential to lead to transformative learning (Moore, 2005).

The final segment, *recalibration*, includes Phases 9 and 10 of Mezirow's (1991; 2012) list. This segment is where all of the awareness, evaluation, and exploration that the learner has experienced are internalized into new perspectives and frames of reference. Feller (2015) notes that the changes in this segment are progressive and humanistic. Recalibration is not something that occurs overnight. The educator working with a learner in this segment should be patient and

help to build the learner's confidence in their new roles and relationships (Feller, 2015).

Affirming the learner's new perspective will help them to accept it and live by it more securely.

Moving through the segments and phases of transformative learning does not happen neatly, wrapped up in a learning package of a traditional college semester – it can be a longer, ongoing process with no clear timeline. The unwieldy timeline can be understood more clearly in considering schemas. The more knowledge someone has accumulated, the more schemas they have established in their minds and memories. When exposed to an unfamiliar word, the learner assigns meaning to that word based on the schemas already in their mind (Tagg, 2018).

Assigning meaning and sorting through schemas takes time to process and learn. Therefore, experts in a certain subject area learn faster than novices because their schemas are secured in long-term memory with more complexity and flexibility in its use when new information comes about (Tagg, 2018). By the same token as a topical novice, “transformative learning, which by definition allows for changing the student's meaning perspective, takes a long time for the simple reason that the student's meaning perspective is *already consolidated*” (Tagg, 2018, p. 6) and consequently harder to change and fit into an existing schema (Mezirow, 1991). Different phases – for example, an action-oriented phase versus a reflection-oriented phase – are also more difficult for some learners than others and consequently take differing amounts of time (MacKeracher, 2012). The process of transformative learning may then have an unpredictable timeline, and certainly one that could extend beyond the course of a semester.

Higher education is structured such that students earn credits by enrolling in courses on specific topics, finish those courses in fourteen weeks, give-or-take, and then move onto the next set of courses after being assigned grades assessing their proficiency in the pre-determined topics. The constraints of this system do not strictly allow for built-in opportunities for continued

critical reflection on the previously studied topics. Put another way, the system was not built to support a learner going through the phases of transformative learning regarding a singularly focused disorienting dilemma throughout the degree-seeking years. Dirkx (1998) reminds educators that “transformative learning has neither a distinct beginning nor an ending. [...] As educators, it is a stance we take towards our relationships with learners rather than a strategy that we use on them” (p. 11). Educators who wish to take a stance towards transformative education pedagogy must then find ways to support learners journeying through the phases of transformation despite the constraints of the higher education system as it is currently run. An awareness of the phases involved in transformative learning can aid the educator in understanding and supporting learners’ journeys.

Reflection in Transformative Learning

Depending on which set of transformative learning phases the educator follows, reflection is a key part of at least four or five phases following a disorienting dilemma. The frequency with which reflection is included in Mezirow’s phases of transformative learning speaks to its importance in the learning journey. To have the kind of deep shift in meaning perspective characteristic of transformative learning, the lens through which a learner views the world must change through a process of critical reflection. Scholars across the field of transformative learning agree that through critical reflection, “we come to identify, assess, and possibly reformulate key assumptions on which our perspectives are constructed” (Dirkx, 1998, p. 4). The learning process would simply not move forward without reflection. Mezirow also identified three types of reflection that have a role in transformative learning theory: content reflection, process reflection, and premise reflection (Cranton, 2016; Kitchenham, 2008).

Discerning separations between these three types is part of why the reflective phases of the theory are not presented in a combined manner.

Educators who follow the constructivist perspective of learning are clear that meaning exists or is constructed within the learner. Further, meaning may not truly be present or significant to the learner without critical reflection and discourse with others (Kitchenham, 2008). The *and* is a key part of this formulation: learners need critical reflection *and* critical discourse (Kitchenham, 2008). For this reason, it is useful to strike a balance between independence in the learning journey and collaboration with others to allow for discourse. Educators can think about the reflective components of transformative learning in a conceptual way, but good progress will not come for the learner without considering external factors also at play. Mezirow (2012) explains it well:

Critical reflection, discourse, and reflective action always exist in the real world in complex institutional, interpersonal, and historical settings, and these inevitably significantly influence the possibilities for transformative learning and shape its nature. The possibility for transformative learning must be understood in the context of cultural orientations embodied in our frames of reference, including institutions, customs, occupations, ideologies, and interests, which shape our preferences and limit our focus. (p. 88)

Mezirow's words speak to the premise that reflection is easier said than done. It can be a "fluffy" concept that is foreign to learners who have not practiced it before. Given the many factors involved, including psychological and sociocultural factors, truly engaging in critical reflection may be an enormous challenge for learners (Kreber, 2012). Educators should not assume that learners know how to critically reflect. It is not something they can be sent off to do and check

off a list without any direction or practice. In many ways, critical reflection is a skill that is developed over time with continued practice.

Beyond the importance of reflection and the obstacles to consider, it is worth mentioning various methods of reflecting critically. While there are countless ways to critically reflect, these examples appear most prominently in the field: independent journaling, small group critical discussions, keeping a video diary, creating visual expressive artwork, and storytelling. Practicing these methods of reflection and others is an unquestioningly integral part of the transformative learning journey. Keeping records of a learner's reflections, though certainly not required, can also demonstrate transformative learning. One scholar uses her own experience with storytelling to exemplify her transformation. Her co-author articulates what is apparent in the story after a disorienting dilemma and subsequent phases of transformative learning took place: "The basic elements of the story were always the same, but the story fit into her life in different ways. It had to transform in order to stay with her" (Tyler & Swartz, 2012, p. 463). The basic elements of her story (her experiences) did not change; rather, her view and perspective had been transformed and thus made for a different story. Similar examples can also be detected through changes in journal entries, ways of speaking in discourse, and many more.

Additionally, critical reflection has long been considered entangled with emotion and creativity (Boud, Keogh, & Walker, 1985; Brookfield, 1987; Kreber, 2012; Mälkki, 2010). It is more than a rational activity. Due to the emotional and creative nature of critical reflection, the educator should be mindful of developing a learning environment where deep emotions can be safely and respectfully explored. I comment further on the educator's role in a subsequent section.

Particularly when emotional and creative processes are involved in reflection, it calls for creative methods of reflecting. Traditional methods of reflection work well but should not prevent educators and learners from trying out more avant-garde ways of critically reflecting such as fostering the imagination (Kreber, 2012) or even adult play therapy (Association for Play Therapy, n.d.). Facilitating critical reflection in learners has a lot of potential to be personally and professionally fulfilling to educators who seek to work creatively because it is a dynamic process with plenty of room for innovation. It is my hope that researchers will continue to explore new methods of critical reflection and educators will continue to utilize an ever-expanding toolbelt of reflection methods while facilitating transformative learning.

Transformative Learning in a Study Abroad Context

Transformative learning can occur in any context. Being in one physical location or another does not make transformation impossible nor inevitable. However, a learner is more primed for experiencing disorientation or being willing to engage in critical reflection when outside of their own culture and settings of familiarity. The “Otherness” found in study abroad enables more potential for transformative learning (Morgan, 2010). In settings that are familiar to the learner, their internalized perspectives and worldview are banal and not consciously considered. Unfamiliar settings tend to keep people more alert and observant, and more likely to consider the Otherness that may become apparent in such settings. They also allow people a greater sense of freedom to experiment with the setting without the same types of consequences that may be present in the home environment. The study abroad context is thus a prime testing ground for an emerging adult’s engrained value and belief systems as they absorb and experience the values and belief systems of the Other (Morgan, 2010; Perry, Stoner, & Tarrant, 2012).

In breaking down what makes this context opportune, the necessity to travel from one destination to another plays a part in the equation. The act of traveling to a new place can help the learner to open their mind to difference and prepare their mind-set to critically consider alternative perspectives to their own. The travel component may also lead the learner to “experience a degree of disruption to their subjective orientation to the world (worldview or inner consciousness) sufficient to engender transformative learning” (Morgan, 2010, p. 249). Study abroad programs have the unique power of transplanting learners in an unfamiliar environment and expecting them to continue going about their lives as students. The transplantation is also temporary in that learners will return to the context from which they came. Such circumstances can allow learners to experience new habits, languages, routines, customs, infrastructures, and people before returning home to try and make sense (make meaning) of what they experienced. Study abroad programs are designed to grant learners exposure to things they never experienced, immerse them in cross-cultural settings, and develop their global perspective. It is no surprise that countless scholars agree that study abroad creates a learning environment prime for transformative learning journeys (Cranton, 2016; Kasworm & Bowles, 2012; Morgan, 2010; Perry, Stoner, & Tarrant, 2012).

Once again, Morgan (2010) reminds us that a learner can be transformed in any context. The key element is a mind that is ready and has intentionality to pursue a transformative learning journey in the context. The context of study abroad and everything that goes with it naturally sets the stage for a learner to be ‘primed’ for transformation. Study abroad practitioners may even prime students further for the potential of transformative learning through pre-departure preparations such as peer dialogue groups or goal-setting workshops. While pre-departure preparations will not make transformative learning inevitable for every learner who studies

abroad, they will likely increase the potential for disorienting dilemmas, critical reflection, and other subsequent phases of transformative learning within the context of study abroad.

The Educator's Role

We have seen that studying abroad has a natural connection to transformative learning. I am not the first to sing high praises of study abroad in higher education, nor will I be the last. With my support for global education opportunities clear, I must also acknowledge that study abroad does not magically lead to transformation in the same way that a disorienting dilemma does not magically lead to transformation. The study abroad context should not overshadow the importance of the educator. As Feller (2015) put it when describing the necessary catalysts for transformative learning, “the fact is *how we teach* is the catalyst in the formula” (p. 70). The educator is a critical component to transformative learning. When we speak of transformative learning, the transformation we refer to is happening within the learner. However, transformative learning is by nature a collaborative process between the learner, other learners, and the educator. Without the educator working with learners, there is a much lesser likelihood of learners being transformed. This section discusses the role of the educator in transformative learning and presents best practices for such a role.

The educator's role in TLT must begin with a solid understanding of what it is and how it is used. The word *transformation* is often used both within and outside of the educational realm in ways that do not align with transformative learning theory. Daily usage of *transformative learning* and *transformative experiences* within higher education are grand and catchy, but the continued overuse and misuse can lead to the word losing its “utility and validity” and remove it further from Mezirow's original concept and theory (Brookfield, 2000; Cranton & Taylor, 2012). This concern has motivated me as an educator to gain a deeper understanding of TLT and to

encourage other educators to further explore the learner support necessary throughout transformative learning journeys. Moore (2005) also shares the concern “that *transformative learning* [...] will become [a buzzword] and that academics will not recognize the support necessary for personal changes of this magnitude to take place” (p. 89). Educators who can decipher when *transformative learning* is being used in accordance with its theoretical underpinnings and who practice correct usage themselves will be more successful in fulfilling their additional roles as a transformative learning educator.

Role in facilitation. The educator can act as the catalyst to a transformative learning journey. The significance of the disorienting dilemma was previously discussed in conjunction with the necessity of acting upon the disorientation to kindle its spark. The educator can facilitate action on the part of the learner that may have otherwise been dismissed. In other words, the educator who is in tune with their students may be able to recognize the potential for transformative learning and encourage their students to act upon their disorientation when they may have otherwise chosen to ignore it. The early components may be in place for transformative learning and when an educator who is well-versed in transformative learning recognizes those components, their role is to facilitate the next steps of the TLT process with the learners involved. This should be accomplished by working in psychosocial, sociolinguistic, and epistemic frames of reference (Cranton, 2016). The educator can be the difference between potential and action – between passivity and transformation. Thus, a practiced and knowledgeable educator should use their experience to take on a role of facilitation through a learner’s journey.

Role in reflection. Upon embarking on a transformative learning journey, the educator may notice that the learner could benefit from building their skills in reflection. Many learners at

the tertiary level have not had expansive experience with processes of critical reflection. I argue that critical reflection practices are a learned skill. For reflection to be most effective as a learning tool, it should be practiced and performed with intentionality. It is incredibly difficult to task a student to simply “reflect” without any direction. Learning to reflect takes time and practice. This could mean workshopping journaling techniques, developing mentored storytelling sessions (Tyler & Swartz, 2012), assigning thought-provoking fine art projects, engaging in contemplative practices of movement such as yoga or meditation, simply conversing about reflection strategies, or a range of other practices. Ultimately, the educator should aim to develop both critical reflexivity and reflection in learners (Ettling, 2012). The educator must be well practiced in reflection themselves to be an optimal support for the learner. An educator who is unskilled at reflection should reconsider their qualifications to guide learners through a transformative learning process. As critical reflection is so integral to transformative learning, the educator’s role in promoting critical reflection is not one to take on lightly.

Role in modeling. Modeling active transformative learning via critical thinking and discussion of perspective changes is also important for learners. Educators should be aware of themselves as both learners and practitioners (Cranton, 2016). Teaching is not static nor is it passive. The educator must be self-aware and, as stated above, regularly practice critical reflection themselves to be successful in facilitating learners’ transformation. Scholars of adult education suggest keeping a teaching journal, attending professional development workshops and conferences, and participating in discourse groups with peer colleagues as methods to maintain a steady framework for transformative learning (Cranton, 2016).

Educators can also model critical reflection by being the first to share a reflective story from their own experiences. This kind of modeling can set the tone for hesitant learners and

show that there is a safe learning environment to unmask and engage in reflection that could involve deeply personal thoughts, perspectives, or experiences; “educators who first unmask with a story that may feel risky will help learners calibrate the extent to which they can take risks with their own stories” (Tyler & Swartz, 2012, p. 466). Modeling both in group settings with learners and independently in daily life should be established as part of the educator’s role. Engaging in exercises that stretch the educator’s mind – that allow them to play with the clay they have been given and mold it into new forms – is a process that should never go cold for an educator who desires to promote transformative learning practices for other learners.

Role in authenticity. Along with modeling, the educator must be authentic with their students. Authenticity and building trust go hand-in-hand here, and both can lead to more positive transformative learning experiences. Encouraging group process and peer support (and collaboration as well as validation in reflection) is most successful when the educator is authentic. Being authentic also comes with being vulnerable as an educator. Each educator carries embedded assumptions and perspectives of their own which are inherent in their practice. These assumptions and perspectives can aid or hinder students’ transformative learning processes. When the educator is open with their students about these embedded assumptions, it creates space for more critical dialogue which can give way to continued reflection on students’ learning journeys regardless of whether the students hold the same assumptions on their own. It is part of the educator’s responsibility to understand their own assumptions and to revisit them and develop new or further understanding as they continue their own journey as an educator.

In my view, educators are not well-positioned to engage learners in transformative learning work without willingness to engage in transformative learning themselves. Put another way, the educator’s role is also to be a learner. Being a learner and an educator simultaneously

allows for even greater authenticity and connection to the learner's journey. The task for the educator here is to promote challenge and support for the learners that may typically come to mind – namely our students – while also promoting the same for themselves and their peer educators not solely as educators but *as learners*. It can be easy to neglect your own learning journey when wearing your educator shoes; we are better educators when never removing our learner shoes.

Role in referring. Another part of the educator's role is knowing when the needs of the learner go beyond the educator's expertise and having resources and extra support at the ready to provide to the learner in need. Examples of resources that may be relevant include information about support groups, contact information or collaboration with student affairs professionals, and referrals to professional counseling. Educators may also want to supplement necessary referrals with encouragement of contemplative practice (Barbezat & Bush, 2014). At such points where additional support may be needed, it is helpful to distinguish whether the transformation is personal or academic. A personal transformative journey can be more "dangerous" to the learner in that it may be connected to personal traumas or complex personal relationships. Such journeys can be delicate and require extra close facilitation and support for the learner.

Central to their role in referring is for educators to know how to recognize when a well-qualified therapist should step in with the learner. Cranton (2016) explains that "it is reasonable to support life transitions that come through transformative experiences, but of course, it is dangerous and unethical to step in where professional counseling is needed" (p. 129). It takes practice and experience for the educator to gain expertise in recognizing that threshold for each learner they work with along their transformative learning journey. Individual differences also come into account here and knowing each learner well makes this determination easier.

Transformative learning aside, academics exploring ethical issues in adult education have emphasized the importance of being aware of an individual's personal value system and how attached and internalized that system is within the individual (Brockett, 1988). A solid understanding of the learner's foundational value system can be informative in determining the extent of academic and personal discomfort the learner can handle and how they might respond. When the learner's reactions approach the threshold or the learner respond in unexpected or concerning ways, the educator cannot hesitate to refer them to additional experts for assistance in their journey.

Finally, the educator has a major responsibility in not crossing any ethical boundaries. The role of considering and remaining within proper ethical boundaries – and I want to emphasize this point – cannot be neglected. At times, such boundaries can be difficult to pinpoint. As Cunningham (1988) put it in regard to ethical boundaries in adult learning, “the ethical role of educators is to provide environments that allow people to examine critically the water in which they swim” (p. 135). The next section is dedicated to expanding upon the ethics involved in transformative learning and how educators can maintain a healthy respect for them as they work with learners. To borrow Cunningham's metaphor, I explore how to ethically support learners as they examine their swimming water.

Transformative Learning and Ethical Boundaries

Mezirow (1991) said that “encouraging learners to challenge and transform meaning perspectives raises serious ethical questions” (p. 201). Transformative learning theory cannot be discussed comprehensively without expanding upon the ethics involved. Before choosing to become involved in a learner's transformative learning journey, the educator needs to think critically about their reasons for engaging with this type of learning (Moore, 2005). It must be

certain that the educator's rationale is not ethnocentric nor self-serving even in a subconscious manner. This type of learning process can easily slide "into the realm of manipulation rather than transformation" (Cranton & Taylor, 2012, p. 8). Moore (2005) similarly describes the slippery slope to avoid the fostering of transformative learning turning into something more akin to brainwashing, coercion, or indoctrination. To remain ethically sound in their practices, the educator should make clear to learners that engaging with a disorienting dilemma – or any other phase of the transformative learning process – is an autonomous choice to be repeatedly made by the learner independently (Cranton & Taylor, 2012). The idea is similar to a living *informed consent* agreement; learners need to know that they can choose to stop actively engaging in their transformative learning journey at any point, and that while the educator is guiding, the learner is the one leading the way. The educator who takes over as leader is certainly crossing an ethical boundary.

Discerning where all the ethical boundaries lie is not always a clear-cut task. Examples are useful in breaking this down further. To begin: Is it ethical for an educator to choose what a student's disorienting dilemma should be and to push their agenda and curriculum on learners based on that theme of disorientation? While such an approach would make course planning drastically easier and more suited to the adopted constraints of a four-month-long college semester, I argue that it pushes the ethical boundary too far. Let us take another question from Moore (2005): "Is it ethical for an educator to facilitate transformation when the consequences may include dangerous or hopeless actions?" (p. 87). In that scenario, an ethically aligned answer is more ambiguous because the consequences can be difficult to predict and are likely to vary by individual. The idea that Moore is getting at, though, is finding the fine line between productive uncomfortable pedagogy and choices that cause harm to the learner or others. When

there is the potential for long-lasting or irreversible harm or damage of any kind, the educator should discontinue facilitating transformation. In such a case, it is also the educator's responsibility to pull in additional help to ensure the safety and wellbeing of all involved.

When discussing the ethics involved in being a transformative learning educator, Ettlting (2006; 2012) presents the idea of an ethical path with *ethical capacities* as opposed to a set of standardized guidelines for practice. She suggests that educators must gain ethical capacities for their practice through their individual journeys, both personal and spiritual, rather than following a set of step-by-step standardized guidelines for how to provide a student with a transformative learning experience (Ettlting, 2012). Those standardized guidelines do not exist in the field of transformative learning, perhaps because of the nature of this type of learning. However, it is critical to give high regard to ethical practices and competencies developed by transformative learning educators – practices that are inevitably informed by the educator's own value system and perspectives.

We must be careful of the assumptions that typically come along with being an educator. Most educators, by nature, believe that education is a positive force and allows for our advancement as people (Cranton, 2016). I myself firmly believe in the power of education. But is it appropriate to impose our love of learning on others? Is it ethical to will others to have a deep shift in meaning perspective? More specific to the study abroad context, which first and foremost is an *academic* program: Is it appropriate to use an opportunity in which a disorienting dilemma is more likely to encourage students' *personal* transformation through their learning experiences? While educators can guide and facilitate, we cannot choose how a student personally processes their world. We cannot choose what may become a disorienting dilemma and thus how a potential transformative learning process will begin for learners and whether it

will be more personal or academic. We can only be there to support, challenge, model, and facilitate as it happens. Educators must constantly consider the value systems and perspectives of the learner and of themselves when designing learning environments where transformative learning will be practiced (Brockett, 1988; Ettlign, 2012).

Furthermore, an individual's habit of mind does not inherently *need* to be changed. An individual may not have any desire to alter their habit of mind. While that can be hard to accept for an educator such as myself, who has a deeply rooted desire to keep learning and thrives on being opened to new perspectives, there stands an ethical boundary that should be respected. Reforming a habit of mind is not always a positive experience. Here is where the phrase, *ignorance is bliss* is welcomed and embraced by some. There may be situations when a person experiences a disorienting dilemma, critically examines their habit of mind, and decides that they do not want to alter that habit of mind. This could happen for a myriad of reasons and the reasoning should not have to be explained. In such circumstances, a facilitating educator should not force a path of transformative learning upon the individual. While the educator has a responsibility to educate, there is a difference between teaching and forcing a new meaning perspective upon a learner. It is here that an educator's role as described in the previous section can be questioned. Educators should be aware of these boundaries and should anticipate them. Doing so will allow for more practiced ways of handling situations when the learner is unsure or vulnerable so as to not overstep ethical boundaries.

Discussion of ethical boundaries is thus clearly connected to *uncomfortable learning* and *uncomfortable pedagogy* (Bautista, 2018). When learning remains too comfortable, transformative learning is unlikely to occur. Uncomfortable pedagogy here is like the icdea of pushing a learner but not pushing them over the edge: encouraging the learner to lean far enough

over the cliff to get their adrenaline pumping and bringing some discomfort into their gut as they teeter at the edge, but *never* pushing too far that the learner goes off the edge completely. There is controlled discomfort. Some educators use diagrams of *the comfort zone* to illustrate this point. Educators may facilitate learners stretching beyond the comfort zone, and even into the risk zone, but the ethical boundary is at the danger zone. Educators should prevent learners from moving into the danger zone. Again, it is imperative to practice voluntary participation; learners should never be *required* to share their journaling, storytelling, or other types of personal reflections (Ettling, 2012). The educator has the curious duty to fulfill their role in fostering the critical reflection and reflexivity necessary for transformative learning yet allowing a learner to opt out when they do not wish to share with a group. This speaks to the importance of building a learning environment where trust is central.

We cannot ignore that “there is a strong, ideological dimension to this question of challenging and transforming the consciousness of students” (Shor & Freire, 1987, p. 174). Educators may frequently find themselves nearing ethical boundaries as part of successful transformative learning processes. The proximity to ethical boundaries makes it important to remain aware of them and frequently check in about them as well as to seek the perspective of a peer when questioning where you stand as an educator. In wrapping up the conversation around ethical boundaries, I will reiterate that these boundaries are clearer when the journey is informed and directed by *the learner* as opposed to the educator: “In fostering transformative learning efforts, what counts is what the individual learner wants to learn” (Mezirow, 2012, p. 93). As much as the educator is there to guide, their guidance should be completely led by the learner and not by their own wishes or desires.

The (Digital) Future of Transformative Learning

I write this chapter in the midst of a global pandemic in which most institutions were forced into a digital learning format. While the lasting effects of this historic time are yet to be seen, I speculate that the prevalence of distance learning in higher education will not disappear. Thus, it seems fitting to discuss what transformative learning may look like if facilitated digitally rather than through the in-person lens that Mezirow initially developed the theory around.

Most of the literature on transformative learning in an online or digital format is conceptual rather than recounts of successful practice or case studies. We can take this to mean that transformative learning in a digital manner is either unfavorable or merely newly developing. Smith's (2012) literature review on the subject found only one empirical study about online transformative learning, which did not show the occurrence of transformative learning as an outcome (Killeavy & Moloney, 2010, as cited by Smith, 2012). There is also the issue of whether some of the emotional struggles that can arise from a transformative learning process would be overlooked in an online format. Without in-person contact between the learner and educator, subtleties in body language, facial expressions, changes in routine behaviors, and more indicators that normally suggest to the educator that further support or intervention is needed may be missed completely. This begs the question: Is it possible for the educator to monitor and mentor learners closely in an online or distance learning format? I argue that it is possible in theory, yet it would be nearly impossible and impractical in reality.

Another challenge is the technology required for an online format. If students do not know how to use the technology properly, the learning goals for a given curriculum can be easily lost (Smith, 2012). For example, a learner who does not know how to create a digital story or manipulate a blogging platform may get lost in the technology and have their ability to reach

deeper levels of critical reflection hindered. However, digital technology can be well utilized if the educator and learners are on the same page and have comfort with the digital tools. Under this line of thought, a digital platform opens many great potential avenues for critical reflection through things like blogs, digital storytelling, and more if those involved thrive by using these methods. Current research suggests that while the potential is certainly present, such platforms should be used with caution for the purposes of transformative learning. For example, the findings of one study indicated that student blogging did not elicit the type of critical self-reflection that could lead to transformative learning (Killeavy & Moloney, 2010). This finding further supports the necessity of the educator to explain and set an example of the type of critical self-reflection needed for a learner to potentially move down a path of transformative learning. With instruction, guidance, and intentionality, some of the aforementioned challenges could also be great points of progress for specific types of learners and educators.

It is clear that any future for transformative learning that includes technology is not without challenge. With a specific focus on the learning environment involved, deliberately thinking about the online environment is key to potential success in this format. All the considerations made previously about transformative learning must be taken into account *in addition to* the incorporated technology and the nature of the online learning environment. However, this is not a chicken-and-egg conundrum: the use of technology must be secondary to the pedagogical considerations of an educator facilitating and practicing transformative learning (Smith, 2012). If attempting to facilitate transformative learning in this manner, it is important to remember to build trust and authenticity with distance learners as discussed in the previous section on the educator's role (Smith, 2012; Cranton, 2010).

The additional layers of considerations when the online learning environment is put into play can be overwhelming. Those who are not practiced and comfortable with an online environment may choose to avoid this approach. Yet despite the additional challenges, Smith (2012) suggests that successfully facilitating online transformative learning is possible with strong, deliberate, intentional considerations from the educator. Future methodologies for facilitating transformative learning are still being developed and practiced. There are also recognizable challenges with fostering transformative learning in an online context. However, my stance is that this is an area that researchers should continue to pursue as distance learning is not going away from the tertiary institutional setting anytime soon. As demand grows for distance learning, it is likely that more educators will try their hand at facilitating transformative learning practices in a digital format. It is better to develop TLT practices to allow educators more informed guidance rather than closing the door on the digital format because of its apparent challenges.

Summary

Transformative learning theory has depth and complexity that takes time and practice to fully understand. Mezirow's work with TLT highlights the potential for a learner's deep shift in perspective that leads to them engaging in new behaviors or actions. The transformative learning process can encourage learners to interpret and reflect on their experiences in ways that challenge their deeply held assumptions and habits of mind. That shift in subjective and objective framing after a disorienting dilemma is the hallmark of transformative learning.

Disorienting dilemmas disrupt the learner's routine experiences, opening them to potential transformation if they choose to engage with the disorientation. Experiencing a disorienting dilemma is the first of the ten phases of transformative learning theory. The TLT

phases provide a general scaffolding for the theory though they do not have to be experienced sequentially for transformation to occur. A learner's critical reflection, which requires skill and practice, fosters deeper understanding of their experiences and worldviews. Study abroad is undoubtedly an optimal context for transformative learning because of the Otherness naturally introduced in a new physical environment with cultural adjustments that provide enhanced opportunity for disorientation.

Unfortunately, the term *transformative learning* is increasingly tossed around without regard to the theorized understanding of its associated learning process. With that in mind, the educator's role is first in understanding TLT fully and then participating in transformative learning practices themselves to best foster a supportive environment for other learners engaging in a potential transformative learning journey. Beyond the many roles of educators facilitating transformative learning, ethical boundaries must be considered and respected.

CHAPTER 3

EXPERIENTIAL LEARNING

A theory more commonly understood and applied in practice than transformative learning theory is Kolb's experiential learning theory. Experiential learning theory (ELT) is "a dynamic view of learning based on a learning cycle driven by the resolution of the dual dialectics of action-reflection and experience-conceptualization" (Passarelli & Kolb, 2012, p. 138). The theory is based on constructivist assumptions but also emphasizes the social environment involved, particularly in regard to people and relationship-building surrounding the learner. In this way, Kolb views learning as a process of sense-making that is ongoing and continuously builds upon prior experiences and knowledge through "active engagement between the inner world of the person and the outer world of the environment" (Beard & Wilson, 2006, p. 2; Morgan, 2010). ELT encapsulates the experiential learning cycle, the experiential learning spiral, the educator role profile, and the learning styles inventory, amongst other more in-depth ideas.

Kolb based his research on the works of those he calls the Foundational Scholars of Experiential Learning: William James, Kurt Lewin, John Dewey, Jean Piaget, Lev Vygotsky, Carl Jung, Carl Rogers, Paulo Freire, and Mary Parker Follett (Kolb, 2015). These scholars have each contributed separate yet overlapping ideas to the literature that Kolb uses to ground experiential learning theory. The theory is thus based in social psychology, philosophy, and cognitive psychology. As Kolb (2015) states it:

The aim of ELT is to create, through a synthesis of the works of the foundational scholars, a theory that helps explain how experience is transformed into learning and reliable knowledge. Truth is not manifest in experience; it must be inferred by a process of learning that questions preconceptions of direct experience, tempers the vividness and

emotion of experience with critical reflection, and extracts the correct lessons from the consequences of action. (p. xxi)

Engaging in the learning process in this way allows learners to gain knowledge, understanding, and truth. ELT encourages learners to engage actively in the learning process (Kolb & Kolb, 2018). It is an ongoing process that is simple to understand and thus manageable to incorporate into a learner's journey. In the decades since its foundation, it has become clear that experiential learning theory is popular because it is simple.

There has been some criticism of the simplicity of Kolb's learning cycle as it arguably does not capture all the depths and nuance of experiential learning (Beard & Wilson, 2006; Kolb, 2015). Other models of experiential learning may capture the learning process closer to reality. However, such models are notably more complex and difficult for educators to put into practice. Beard and Wilson (2006) explain: "Kolb's learning cycle can be regarded as a minimalist interpretation of the complex operations of the brain and therefore it is not surprising that this model is somewhat limited in describing the learning process" (p. 43). The simplicity of the learning cycle, as part of Kolb's grander experiential learning theory, also allows for it to be more easily used; simplicity allows for greater access and application for the educator.

The opposing complexities of transformative learning theory and experiential learning theory is one reason why I believe these theories should be paired in the context of teaching and learning in tertiary-level study abroad. The two theories complement one another well when the educator understands both and realizes how pairing TLT with ELT can maximize the power of experience. I am struck by Beard and Wilson's (2006) statement that "maximizing the power of experience, through combining different ingredients, will lead to the maximization of learning"

(p. 43). How experience plays into the learning process continues to be explored in this chapter with holistic learning in mind.

The holistic approach to learning that ELT emphasizes is a clear alternative to learning via information transmission. It allows learners to be stretched in their thinking (Montrose, 2002), leading not just to “cognitive knowledge of the facts” but also the “development of social and emotional maturity” (Kolb, 2015, p. 300; Passarelli & Kolb, 2012). Experiential learning theory is meant to be applied beyond learning in the classroom. Learning instead occurs in all realms of an individual’s life: educational, professional, social, and personal. When nurtured in a supportive environment, lifelong learning in each of these realms becomes part of the learner’s identity (Kolb, 2015; Molden & Dweck, 2006). The holistic approach is quite relevant to study abroad because the separation of these realms of learning can be blurred more than usual in that context.

For example, a learner may build a relationship with the director of their faculty-led study abroad program during formal class time and also at a group dinner or on a cultural outing with members of the program. Time spent abroad often does not fit neatly into boxes of what is *personal* and what is *professional* development. Experiential learning is thus extremely applicable as an educational model for study abroad and can serve as an invaluable tool for learners preparing for the modern workforce – a workforce that calls for transferable skills with evolving experiences. Experiential learning research conducted internationally also supports the model’s applicability in cross-cultural settings (Joy & Kolb, 2009; Kolb & Kolb, 2011a, 2011b; Passarelli & Kolb, 2012). Learners and educators who actively engage with ELT have the ability to develop holistic skills for lifelong learning. While that idea may sound lofty, Kolb clarifies the concept of learning by grounding it with set characteristics.

There are six characteristics of experiential learning, developed by Kolb and Kolb (2005), that are integral to understanding how ELT learning should be understood:

1. Learning is best conceived as a process, not in terms of outcomes.
2. All learning is *relearning*. Learning is best facilitated by a process that draws out students' beliefs and ideas about a topic so that they can be examined, tested, and integrated with new, more refined ideas.
3. Learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world.
4. Learning is a holistic process of adaptation to the world. Not just the result of cognition, learning involves the integrated functioning of the total person – thinking, feeling, perceiving, and behaving.
5. Learning results from synergetic transactions between the person and the environment.
6. Learning is the process of creating knowledge. (p. 194)

These characteristics are touched upon throughout this chapter. They differentiate Kolb's view of experiential learning as well as my own view of learning from a more static method of information transmission.

Moving further into the concepts of experiential learning theory, I should touch upon the learning style inventory that is included in the overall model. The most recent version of the inventory, Kolb's Learning Style Inventory 4.0, is a nine-style typology that captures how some learners prefer one or more learning modes when moving through the experiential learning cycle (Kolb & Kolb, 2018; Kolb, 2015). Learning mode preferences, or learning styles, can be explored to describe the ways in which an individual learner engages with the learning cycle

(Passarelli & Kolb, 2012). However, as this chapter is primarily focused on the overall process of learning and how it plays into study abroad rather than which learning styles may be present, exploring the learning style inventory in-depth is outside the scope of the current discussion. Kolb (2015) suggests that educators need not know which exact learning style is preferred by the learner because the experiential learning cycle is meant to be accessible and experienced by all learners no matter which mode they may prefer (Passarelli & Kolb, 2012). Though the nuances of the learning style inventory have limited relevance for this chapter, other aspects of experiential learning theory are important to cover. The remainder of this chapter presents each mode of the experiential learning cycle, discusses the significance of the experiential learning spiral, and explores the educator's role in ELT.

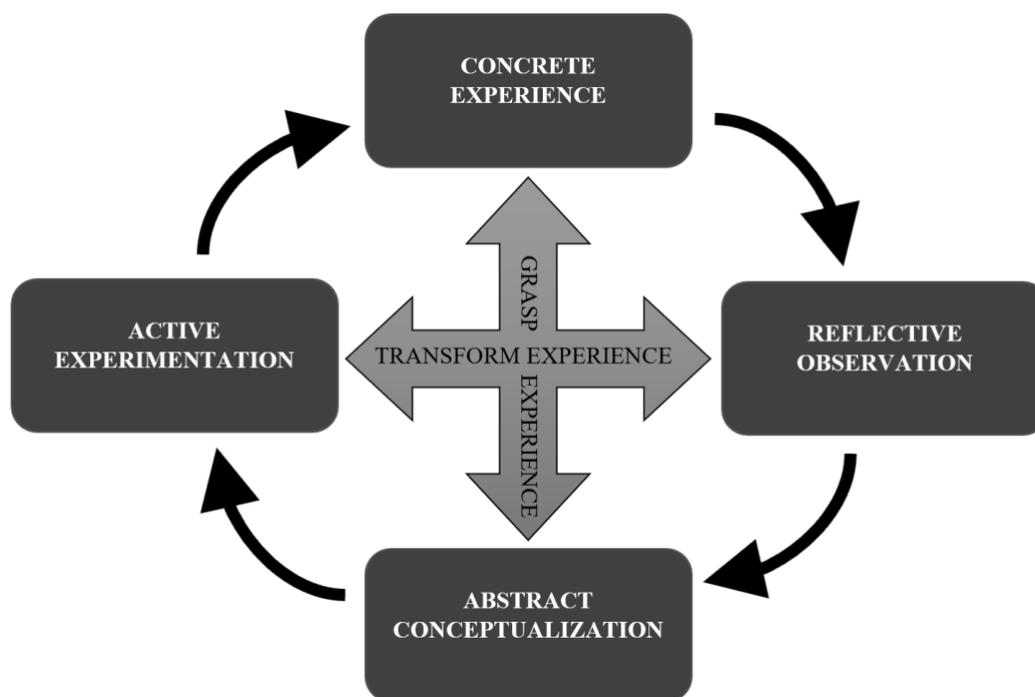
The Experiential Learning Cycle

The experiential learning cycle is essential to ELT. It is a cycle depicting how learners move through four modes in a process of learning. Kolb titled the four modes of his cycle as *concrete experience, reflective observation, abstract conceptualization, and active experimentation*. In the words of Kolb (2015), "learning arises from the resolution of creative tension among these four learning modes" (p. 51). Figure 1 illustrates this simple, continuous cycle in which learners engage in deepening experience and understanding through exchange with their internal world and external environment (Kolb & Kolb, 2018). Therefore, learners are both receivers and creators. Kolb's idea is that learners experience increased complexity and sophistication in their learning as they move through the learning cycle time and again; active engagement with the experiential learning cycle leads to a developmental process of deep learning (Passarelli & Kolb, 2012).

Movement through the cycle occurs through a series of what James (1977), one of the foundational scholars of ELT, calls percepts and concepts. The opposing axes of the learning cycle show modes that grasp experience (concrete experience and abstract conceptualization) and transform experience (reflective observation and active experimentation). Grasping refers to how learners interpret and understand their experiences; transforming refers to how learners behave based on their novel experiences (Kolb & Kolb, 2018; Kolb, 1984). The opposing modes and interactions with percepts and concepts are explained well with an analogy: “Perception exists in the here and now; conceptions point to the past or future. James uses the analogy of a

Figure 1

The Experiential Learning Cycle



Note. Adapted from *Experiential learning: Experience as the source of learning and development* (2nd ed.), by D. A. Kolb, 2015, Pearson Education, p. 51.

pair of scissors – in the same way we need both blades to cut, we need both concrete experience and abstract thinking to make sense of the world” (Kolb & Kolb, 2018, p. 11). These opposing ways of understanding thus enable continued movement in the cycle and allow for deep learning development. Similarly, dialogue is important as the learner moves through the waves of reflective and active modes in the learning cycle (Kolb & Kolb, 2018). Without dialogue with either an educator or another learner, the learner may find themselves stagnating in a single mode of the experiential learning cycle. Moving beyond the overall cycle, the following four subsections expand on each mode.

Concrete Experience. The first mode is often referred to as the *experiencing* mode. It is typically presented as the entry point into the experiential learning cycle though it does not have to be the first mode experienced. *Concrete experience* is characterized by being ‘stuck’ or ‘struck’ by a specific experience outside of the learner’s banal life routines and experiences (Kolb & Kolb, 2018; Kolb, 2015). For deep learning to occur, the concrete experience must be something unusual for the learner. In other words, something that is not “habitual and culturally mediated by many previous trips around the learning cycle” is needed as a concrete experience leading to deeper learning (Kolb & Kolb, 2018, p. 9). Kolb (2015) stresses that the concrete experience should not be over-simplified as a “doing” mode because *all* modes of the learning cycle involve doing and experiencing. Rather, it is a point in which something new is experienced, notably differing from the learner’s past experiences, or notably reinterpreted from a past experience. The concrete experience then becomes the basis for observation or reflection that occurs in the next mode.

Reflective Observation. The second mode is often referred to as the *reflecting* mode. In this mode, the learner reflects on any inconsistencies between the concrete experience and their

understanding (Kolb, 2015). *Reflective observation* includes time to perceive and intentionally reflect on the experience the learner was ‘stuck’ or ‘struck’ with in the former mode.

Abstract Conceptualization. The third mode is often referred to as the *thinking* mode. *Abstract conceptualization* is when reflections from the previous mode are distilled into concepts (Kolb, 2015). New ideas come out of the reflective observation mode and are conceptualized in the learner’s mind. A new concept can be completely novel to the learner or modified from previous knowledge or experiences. This mode emphasizes cognition and conclusions. Abstract conceptualization, once formulated by the learner, leads to new implications for action (Kolb, 2015).

Active Experimentation. The fourth mode is often referred to as the *acting* mode. Learners apply their new conceptualization by trying it out in their environment. *Active experimentation*, as the name implies, involves the intentional behavior of acting upon the learner’s abstract conceptualizations (Kolb & Kolb, 2018). In this mode, the learner is adaptive and action-oriented in their experiential learning. The action from active experimentation serves as a guide for new experiences when the learner returns to the concrete experience mode to begin the cycle anew (Kolb, 2015).

The Experiential Learning Spiral

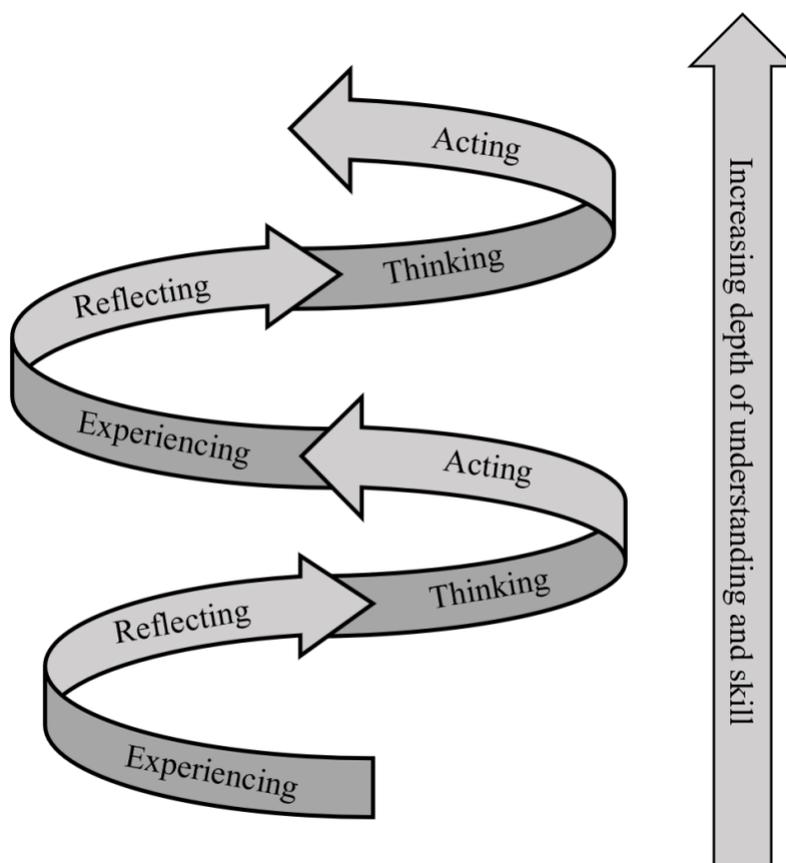
The experiential learning cycle is not meant to have a clear beginning or a clear end. Rather, the learner would optimally continue moving around the cycle as their learning develops and deepens. Kolb (2015) refers to this continuation as the experiential learning spiral. For the learner moving around a continuous spiral, “the learning achieved from the new knowledge gained is formulated into a prediction for the next concrete experience” (Montrose, 2002, p. 6). The key difference between the learning cycle and spiral is that experiential learning deepens

with new experiences and continued growth in the learning spiral as opposed to revisiting the same habitual and culturally mediated experiences (Kolb & Kolb, 2018; Kolb, 2015). Figure 2 shows how depth of understanding increases with each rotation around the cycle-turned-spiral.

The spiral is like a one-way street. Despite going through the four modes of the experiential learning cycle continually, the learner cannot return to a place in the spiral from

Figure 2

The Experiential Learning Spiral



Note. Adapted from “Eight Important Things to Know About the Experiential Learning Cycle,” by A. Y. Kolb & D. A. Kolb, 2018, *Australian Educational Leader*, 40(3), p. 9.

which they have already moved past. Instead, the learner repeats the learning process with added understanding and growth upon each repetition. The dimensionality of the learning spiral resonates with me as it depicts a journey of learning that builds upon all previous experiences, indicating growth, while maintaining the same cyclical process, indicating reliability. It shows that individual experiences and the environment both make an impact on the learner as they journey through percepts and concepts. Learners revisit modes within the learning spiral to discover both the limits and applications of their lifelong experiential learning process (Kolb & Kolb, 2018). Movement around the spiral can explore a particular experience with greater depth in each cycle, explore an entirely new concrete experience, or a combination of those options.

Kolb (2015) contributes his insights on the matter when stating, “it is this spiral of learning that embeds us in a co-evolution of mutually transforming transactions between ourselves and the world around us” (Kolb, 2015, p. 61). Every learner is journeying through their own spiral. One learner’s journey may or may not overlap with another learner’s experiential learning spiral and so forth. From the perspective of an educator, there is no doubt that “for students who move mindfully through the study abroad experience, it has the potential to change their worldview, provide a new perspective on their course of study, and yield a network of mind-expanding relationships” (Passarelli & Kolb, 2012, p. 137). In the next section, I discuss how educators can play a significant role in guiding learners to mindfully move through the experiential learning spiral and thus through their study abroad experience.

The Educator’s Role

There is no doubt that learners benefit from the guidance of an educator as they build complexities in their learning development (Passarelli & Kolb, 2012). Educators’ involvement can make the difference between learning and deep learning. The educator’s role in study abroad

can maximize the potential of the study abroad experience for learners. Utilizing experiential learning theory allows educators to design educational programs, such as study abroad programs, that facilitate learners' movement around the learning spiral (Kolb, 2015). This section first describes the educator's role in experiential learning theory more generally before noting roles specific to each mode of the learning cycle.

Regardless of where and how the journey begins, ELT scholars suggest that educators explain the experiential learning cycle to learners to allow them to better understand the learning process, perceive why the educator may shift roles in various modes of the cycle, and to build autonomy in their own learning journey (Kolb, 2015; Passarelli & Kolb, 2012). Explaining and understanding the process is also a way of building rapport between the learner and the educator. Furthermore, experiential learning theory is not meant to be used with a large-scale lecture group. It was developed with the individual learner in mind and works best when integrated with individual learner-educator relationships. Kolb (2015) says his "aim for experiential learning theory was to create a model for explaining how individuals learn and to empower learners to trust their own experience and gain mastery over their own learning" (p. 53). The role of the educator within this is to create a scaffolding structure of challenge and support to enable empowerment and continuous development in the learning journey.

Role in the learning environment. Once the educator has a solid understanding of experiential learning theory, scaffolding should begin by building and creating the learning environment. The educator should establish ground rules and expectations to develop the culture and boundaries of the group of learners with whom they are guiding. Points of discussion may include learner cooperation, respect, listening, engagement in activities and discussion, and arriving at the experience with a mindset open to learning (Beard & Wilson, 2006; Kolb, 2015).

Additionally, the educator must establish a safe, supportive, and challenging space – physically or metaphorically – for learners to engage in experiencing, reflecting, thinking, and acting (Passarelli & Kolb, 2012). Creating and providing such a space opens the door for learners to actively engage in each mode of the experiential learning cycle. Within the learning environment, educators need to carefully choose when to intervene in the process. Beard and Wilson (2006) suggest that intervening at every step will put unhelpful pressure on learners and prevent them from gradually gaining more control and autonomy over their own learning. In this sense, the balance between challenge and support is essential to progression through the learning cycle and growth for the learner (Patton et al., 2016; Sanford, 1966, 1967). Ultimately, the learning process is not about the educator, it is about the learner, and should always remain learner centered.

Role in modeling. Educators should also model the experiential learning process and authentically share examples of their own experiences in the process with learners (Beard & Wilson, 2006). Educators should not assume that learners have already developed skills for intentional thinking and reflecting; they should be prepared to meet students where they are to build or enhance this skillset through authentic modeling. Modeling not only aids in learner understanding of the cycle, it can also foster confidence in learners. Additionally, modeling can be an invaluable tool in preparing learners for the learning process, thus opening them up for greater learning potential (Roberts, Conner, & Jones, 2013). In the depths of the learning process, the educator must be a stable figure in providing consistent feedback (Passarelli & Kolb, 2012; Roberts, Conner, & Jones, 2013). Feedback leads to deeper understanding for the engaged learner and encourages them to appropriately move through the learning cycle. The overall benefits of educator modeling in ELT are quite similar to those already discussed in Chapter 2 in

regard to TLT. Therefore, I am presently noting the overlapping importance in this role and refrain from repeating content to a greater extent.

Role in commercial balance. The realities of the study abroad field should be considered when practicing experiential learning in this context. Most educational efforts do have the learner's best interests at heart. However, we must also remember that, ultimately, most study abroad providers and international institutions are businesses. Inseparable from a business is the need to make a profit and maintain a standard structure in order to provide educational services. We cannot deny the commercialization of learning practices that can act as selling points to learners specifically in the American higher education system. As *experiential learning* has gained popularity – and even become a catchphrase offering – for many study abroad providers, it problematizes the educator's role in facilitating experiential learning, as it aligns with Kolb's framework, within the confines of the business structure. Educators should therefore be mindful of balancing the needs of learners and ethical educational duties with factors of cost, time, grading structures, and support systems that may or may not be accessible.

The commercialization of *experiential learning* as a catchy method of teaching puts learners at risk of being left without proper educator support once the predetermined timeframe of their study abroad program has passed. To avoid the potential damage or lost learning that may arise from these structural constraints, the educator might consider connecting a learner in-process with another knowledgeable experiential educator who can continue supporting the learning process at the learner's home institution. Such a connection would aim to provide the learner with a continued support system to maximize the deep learning that may have begun during their time abroad. In a similar vein, the educator needs to be willing to engage and knowledgeable in ELT to enter this role. In other words, the ethics of educator training need to

be considered. An educator should not be placed into a position where experiential learning is boasted as part of the curriculum without any knowledge or training on how to facilitate ELT in practice. It is the responsibility of the educator, the study abroad provider, and the learner's home institution to jointly consider such important factors if they wish to promote *experiential learning* to their learners.

The Educator Role Profile. Acknowledging the importance of the educator's role in ELT, Kolb and his colleagues (Kolb, Kolb, Passarelli, & Sharma, 2014) developed the Educator Role Profile. This profile describes role positions based on the four modes of the experiential learning cycle and how the educator can best guide the learner based on what they are experiencing in each mode (Kolb, 2015). The four corresponding role positions - *facilitator*, *expert*, *evaluator*, and *coach* - are depicted within the learning cycle in Figure 3.

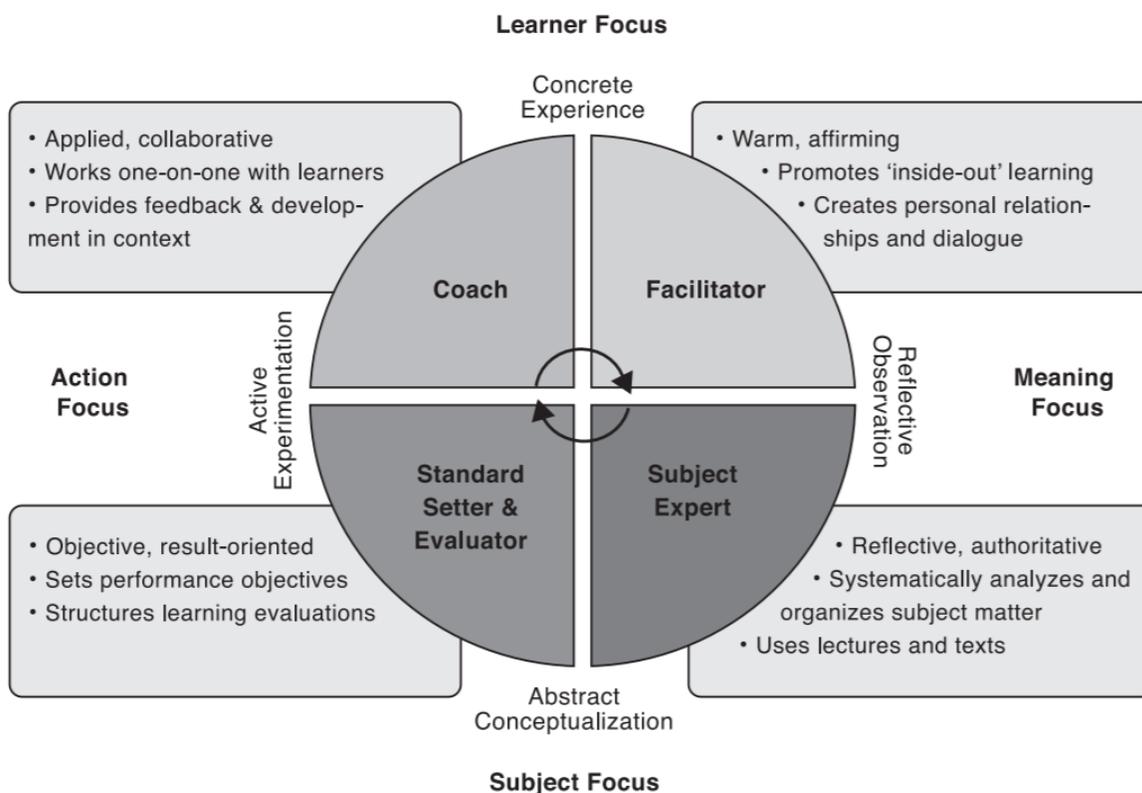
The educator's role as *facilitator* begins directly after a learner enters the concrete experience mode and lasts through the transition into reflective observation. In this role, educators first establish rapport with learners by fostering small group or one-on-one discussion (Kolb, 2015). They should be encouraging and affirming as the learner may be in a vulnerable state upon being 'stuck' or 'struck' by their recent concrete experience. Getting to know a learner from the facilitator role allows the educator to understand the learner to a greater degree. This understanding allows the educator to form a keener sense of when it is most appropriate to intervene for each individual as the learning process continues.

While learners are in the reflective observation mode, the educator should fill the *subject expert* role. There is a greater focus on authoritarian knowing than relationship-building here. Educators filling this role may provide learners with resources on the subject of their concrete experience and encourage learners to think critically about the subject (Kolb, 2015). The learner

may go to the educator to gain knowledge. The educator, acting as the subject expert, may provide information that the learner can use as content for intentional reflection with the goal of connecting knowledge to reflection. In this role, educators should nudge learners to “systematically organize and analyze the subject matter knowledge” (Kolb, 2015, p. 304) they are focused upon. The expert role leads the learner into the abstract conceptualization mode of the learning cycle.

Figure 3

Educator Roles and Teaching Around the Learning Cycle



Note. Reprinted from “Experiential Learning Theory as a Guide for Experiential Educators in Higher Education,” by A. Y. Kolb & D. A. Kolb, 2017, *ELTHE: A Journal for Engaged Educators*, 1(1), p. 18. Copyright 2017 by Southern Utah University Press.

The next educator role is that of the *evaluator*. This role is based upon the learner's performance and setting standards for them to achieve (Kolb, 2015). The push of the evaluator role can help the learner to keep the learning process going and prepare them to apply what they have learned through prior modes. As part of this action-oriented role, the educator also fosters a shift from subject-focused experience to action-focused experience.

The *coach* is the fourth and final role in the Educator Role Profile. Typically, by the active experimentation mode of the learning cycle where this role takes place, the learner has spent a significant amount of time grappling with their experiential learning and needs encouragement to put their learning into action. In the coaching role, educators assist learners in developing action steps that manifest into behaviors based upon experiential learning. The educator coaches the learner as they apply developed experience into their own life context (Kolb, 2015). From that point, the educator moves back into a facilitator role as a new learning cycle begins. Keeping the Educator Role Profile in mind, it is also important to note that the educator may serve in multiple roles simultaneously if they are working with multiple learners who are in different modes of the learning cycle. The educator should be realistic with their capabilities to properly fulfill these roles while successfully and ethically guiding learners.

Summary

Experiential learning theory captures a model of learning that is simple from the surface. The theory includes the experiencing, reflecting, thinking, and acting modes of the experiential learning cycle. Depth of understanding and development transcends for the learner when the cyclical model becomes the experiential learning spiral. The educator's role is extensive. It requires individual attention, creating a learning environment, modeling, balancing commercialization, and filling the roles of the Educator Role Profile as learners move around the

learning cycle. Overall, experiential learning theory provides an easy-to-understand framework for lifelong experiential learning and is undoubtedly a natural complement to transformative learning theory when integrated into practice in the context of tertiary-level study abroad.

CHAPTER 4

OVERLAPPING AND INTEGRATING TRANSFORMATIVE LEARNING THEORY AND EXPERIENTIAL LEARNING THEORY IN PRACTICE

In the previous chapters, I commented on the varied complexity within both theories: TLT is deeply complex whereas ELT is simple and straightforward. They include ten phases and four modes, respectively. True transformative learning occurs rarely whereas experiential learning can occur repeatedly with less ambiguity. Both theories have vast strengths when incorporated into the learning journey. I argue that educators who are familiar with both TLT and ELT have greater opportunity to foster deep learning for students immersed in the study abroad context. This chapter begins by laying out how transformative learning theory and experiential learning theory overlap. Then, an example is presented of how an educator can integrate both theories in practice through a faculty-led semester-long study abroad program. The chapter concludes with revisiting each of the theories and the purposes of my work in connecting them.

Transformative Learning & Experiential Learning Overlaps

In a review of 15 years of studies referencing transformative learning in higher education, Kasworm and Bowles (2012) found that most practitioners in a higher education setting view transformative learning as embedded in experiential learning framework, with educators using strategies of experiential learning to foster transformative learning environments. Transformative learning as the more complex process can make use of its counterpart, experiential learning, to nudge learners along in their journey. This integration works because the theories are based upon the same principles of individual growth and development, critical reflection, holistic learning, and systematic process (Feller, 2015). However, I must note that the theories' integration is not interchangeable: though experiential learning strategies can foster transformative learning

environments, the reverse does not hold. An integral difference in the theories lies in that distinction. Educators can create experiential learning environments and curriculum, but we cannot create transformative learning (Feller, 2015). Practitioners who assume that experiential and transformational learning are one in the same “miss essential clues indicating how well a student is making sense of self, place, and subject,” which can lead to regression in their learning or missed opportunities for growth (Feller, 2015, p. 66). However, experiential activities, including those encouraged within ELT, can help foster transformative learning (Cranton, 2016). Though the theories are different, they are innately intertwined.

The phases of transformative learning can be roughly placed into the modes of the experiential learning cycle (MacKeracher, 2012). For example, the idea of a *concrete experience* is similar to Mezirow’s concept of the *disorienting dilemma*. Both are experiences that commonly mark a learner’s entrance into a journey of deeper learning related to the topic of the disorientation. The notable similarities align the first phase of TLT with the *experiencing* mode. Furthermore, the second and third phases of transformative learning theory align with the *reflecting* mode. The fourth through eighth phases align with the *thinking* mode. Finally, the ninth and tenth phases align with the *acting* mode of the experiential learning cycle. I use these examples to demonstrate how practices of TLT and ELT may overlap. Conceptually, it is helpful to understand the theories’ similarities in this manner. The reality of learners moving through transformative learning journeys, however, is unlikely to neatly and perfectly align in the way that I just described. Reality is much messier. Before further exploring the messy learning involved in TLT and ELT in practice, differences in reflective practice between the theories must be noted.

As mentioned in the previous chapter on experiential learning theory, reflection is emphasized to a lesser extent in ELT than TLT. This is a common point of scholars' critique of experiential learning theory. In defending this criticism, Kolb (2015) acknowledges that many learning theorists, including Mezirow, emphasize reflection as the core element leading to deep, transformative learning and explains his rationale for the role of reflection in ELT:

Reflection in experiential learning theory is not the sole determinant of learning and development but is one facet of a holistic process of learning from experience that includes experiencing, reflecting, thinking, and acting. Reflection in isolation can become retroreflection, a turning in on itself that isolates the learners in their own self-confirming world unable to reach conclusions or test them in action. (p. 57)

I argue that reflective practice is why the educator plays such a vital role in genuine transformative learning – the educator guides the learner to step outside of their own mind and move to action. Therefore, Kolb's point that reflection can become retroreflection would be negated when the educator is facilitating the learner's journey and interrupts learner reflection at optimal points along the journey. My contradiction works, of course, in a theoretical sense when all aspects of the experiential and transformative learning processes occur in a neat and perfect vacuum. Educators and learners alike know that this does not reflect reality; life is more complicated and imperfect.

MacKeracher (2012) expertly calls out this point when discussing how her own experiences with transformation match up to how transformative learning is described across the literature. She declares that "most articles about transformative learning were written as if the process occurred in a vacuum without emotional responses and without interaction with others," and begs the important question, "Where is the messiness, the chaos, and the emotional roller

coaster that transformative learning brings to me?” (MacKeracher, 2012, p. 349). The messiness certainly exists in practice. No matter how well-researched the theories are, how a learning journey plays out in practice inevitably brings unexpected twists. The learner may have experiences that are disjointed and contradictory in one breath and straightforward and organized in another. The educator may also respond in chaotic and messy ways during their facilitation. It is important to acknowledge that both transformative and experiential learning are chaotic, messy, and individual processes. The cyclical relationship between theory and practice cannot be stressed enough when integrating transformative and experiential learning in study abroad.

A Faculty-led Semester-long Program in Practice

My applied scenario of how the theories may be integrated examines a group of 20 students and one faculty member from an American higher education institution participating in a semester-long study abroad program in Argentina. As part of the faculty-led program, students take two courses taught by the faculty director in her area of interest along with two Spanish language and culture immersion courses taught by partner faculty members at the local university. The faculty director is fluent in Spanish, well-versed in experiential learning and transformative learning practices, and is accompanied by her partner and small children.

The faculty director, whom I refer to as Dorothy, is excited about the semester for her own development as an educator. Like many educators, she acknowledges that she has not previously spent the time she wishes exploring the learning process and hopes the time abroad will encourage her to further consider that aspect of teaching (Feller, 2015). The study abroad context may allow educators to spend more time considering the learning process because, like study abroad students, accompanying educators also experience a change of environment that may spark their own perspective shifts and learning. Dorothy’s course curricula are built upon

the experiential learning spiral in hopes of fostering deep and potentially transformative learning in her students. A learning environment based on the experiential learning spiral lays a foundation for the types of practices that have been known to foster transformation. Dorothy plans to engage learners in the semester abroad program both within and beyond the classroom setting as she invites students to join her family for cultural activities outside of class time. She remains cautious because she knows that experiential learning practices do not inherently produce learner transformation (Feller, 2015; Montrose, 2002). However, Dorothy intentionally designed the semester to provide scaffolding and support for learners who may find themselves in disorienting dilemmas with the desire to act upon their disorientation and engage in a transformative learning journey.

I concur with scholars who present study abroad as a multi-semester experience (Roberts, Conner, & Jones, 2013). This means that the potential journey of transformation begins pre-departure and ends well after learners' reentry back home. As an educator familiar with the benefits of a multi-semester experience, Dorothy meets with her students throughout the semester prior to their departure for Argentina. Getting to know the learners as a group as well as independently both primes them for experience and allows Dorothy to learn more about them and have a better grasp of when and how to intervene in the learning process for each student. This step is important because "the activity of studying in a foreign country in and of itself does not provide learning" (Montrose, 2002, p. 1). In other words, as my colleague tells learners in a pre-departure goal-setting workshop she facilitates, simply stepping off an airplane in a new country, opening your arms wide, and shouting "change me!" does not exactly do the trick. It bears repeating: the potential of transformation in study abroad requires intentionality and work on the parts of both the learner and the educator.

Dorothy's understanding of TLT and ELT informs her decision to utilize multiple methods of critical reflection when working with her students in Argentina. First, she requires that students keep a journal throughout the semester. Dorothy emphasizes the importance of journaling by devoting a brief portion of class time for everyone to write in their journals, including Dorothy herself who models the practice in front of her students. Students' are graded on their journaling not by the content but rather by their participation in writing and conversation in small groups and individually with Dorothy.

Secondly, Dorothy has drawn on the expertise of an Argentine faculty member at the local university who teaches the students' language and culture courses. That faculty member is a trained facilitator in a lesser-known practice of critical reflection: LEGO Serious Play. The well-known building blocks, LEGOs, get their name from the Danish words *lege godt*, meaning *play well*. From my vantage point as an educator, I reason that playing well is intertwined with learning well. Other methods of critical reflection already discussed such as journaling, drawing, writing poetry, making music, digital storytelling, reflective conversation, and participating in other contemplative practices are all examples of the learner *playing* with their assumptions, experiences, and knowledge. All these methods promote a furthered learning journey.

The LEGO Serious Play method involves learners building visual representations of their responses to the facilitator's series of questions. The questions are intentionally crafted to promote deep thinking and reflection through the process. More specifically, the activity is comprised of "building landscape models with LEGO elements, giving them meaning through story-making, and playing out various possible scenarios – a process which deepens understanding, sharpens insight, and socially 'bonds' together the group as it 'plays' together" (LEGO Group, n.d.). Learners experience this method in a group setting where peer learners are

encouraged to ask questions of each other's LEGO models. The method provides a safe and creative way to explore any disorienting dilemmas that Dorothy's students may have concretely experienced.

I bring up the LEGO Serious Play method in the scenario of this semester program in Argentina to stress the point that critical reflection can come in many forms. Traditional methods such as journaling and non-traditional methods such as LEGO Serious Play both have immense potential in fostering the kind of deep processing and reflection involved in experiential and transformative learning. Educators who combine traditional and non-traditional methods in practice may be most effective in creating an environment ripe with the spirit of transformation. Structured *playing* as a tool for learning allows learners to be imaginative, to explore perspectives outside of their own immediate reality, and to be more open to disorientation. When it is in the context of *play*, learners may be more open to the messiness that is inseparable from the innate deep learning of transformation.

Beginning before the group's departure for Argentina and throughout their time in-country, Dorothy works to build and maintain the scaffolding needed for experiential and transformative learning experiences. The potential for transformation for her students is also heightened because Dorothy offers them re-entry support when they return to campus in the United States. Critical reflection after the scheduled program keeps the learners' attention on their study abroad experience upon their return to a once familiar context; oftentimes learning continues (Roberts, Conner, & Jones, 2013). While transformative learning as articulated in TLT is not guaranteed for even one of the students who studies in Argentina in this theoretical scenario, Dorothy incorporates her knowledge of the theories, integrates experiential learning practices in multiple settings, and strives to fulfill each of the educator's roles ethically. She has

set the stage for any learners who do experience disorientation and wish to pursue a learning journey with the support of a skilled educator.

Concluding Thoughts

Two of the great scholars in this subject area, Cranton and Taylor (2012), synthesize the field of transformative learning, its power, and its essence:

The growing body of research and alternative perspectives reminds educators that fostering transformative learning is much more than implementing a series of instructional strategies with adult learners. It is first and foremost about educating from a particular educational philosophy, with its own assumptions about the purpose of education, the role of the educator, and the nature of knowledge. (p. 15)

Educators should approach their work with both transformative learning theory and experiential learning theory as an educational philosophy rather than a series of steps that infallibly lead to transformation. In other words, it is okay if transformation does not occur. Education from a TLT and ELT approach is not about transformation as the end goal – it is about the learning journey.

It would be idealistic and plainly false for me to claim that transformative learning occurs in every class or for a learner in every study abroad program. Many learners may express moments of excitement, change, or discovery in their learning that are completely independent of true transformation. Educators can mistake those moments as signs of transformation and should be cautioned not to falsely identify transformative learning. Instead, my claim is that learning through an intentionally developed experiential learning curriculum with the scaffolding to support transformative learning if it were to sprout, makes it more likely for transformation to occur for learners. Optimal curriculum utilization of both TLT and ELT focuses on context-specific learning strategies as well as educator training and program design considerations. Yet

ultimately, no matter how well the educator optimizes the learning environment, transformative learning cannot happen without intentional engagement from the learner.

Mezirow's transformative learning theory articulates the ten-phase process that may lead to deep perspective transformation. Kolb's experiential learning theory utilizes the experiential learning cycle and spiral to depict the optimal process of deep learning. In integrating the educational philosophies of both, we see an increased potential for transformation yet no straightforward blueprints that guarantee learner transformation. Throughout the combined process, we must also keep ethical boundaries in mind. Not all learners want to engage in a transformative learning journey. Having a learning identity is not a given for students studying abroad. Regardless, the optimal context of study abroad paired with fulfilling the educator's roles allows for maximized student learning before, during, and after the experience.

It is my hope that educators indulging in my writing are encouraged to gain a deeper understanding of transformative and experiential learning through practice and adopt educational philosophies stemming from TLT and ELT along the way. I am reminded that there is always more work to be done, as my own educator's identity has developed through this writing process. A learning journey, whether it be through study abroad or other contexts, awaits all learners who wish to engage. Learning is messy, but discovery is endless.

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VITA

COLLEEN M. KOLB**Education****Old Dominion University, Norfolk, VA** (December 2020)

*Master of Science in Education: Educational Leadership – Higher Education, International Education Track
Scholarship Award, Higher Education Program* (May 2020)

Gettysburg College, Gettysburg, PA (May 2017)

*Bachelor of Arts: Psychology, Minor in Studio Art
Member of Psi Chi, the International Honor Society in Psychology
Leadership Certificate, Garthwait Leadership Center* (May 2015)

DIS Study Abroad in Scandinavia, Copenhagen, Denmark (August 2015 – May 2016)

Studied in *Psychology* program (Fall 2015) and *Child Development & Diversity* program (Spring 2016)
Class Representative for Cross-Cultural Psychology and Child Development in Scandinavia core courses

International Higher Education Experience**Associate Program Manager**, Center for Global Education, Hobart and William Smith Colleges, Geneva, NY
(September 2019 – Present)

- Manages all aspects of short-term study abroad programs from program proposal through re-entry.
- Manages Terra Dotta application portal, including interface updates and building process elements.
- Facilitates pre-departure study abroad Goal Setting Workshops for small groups of students.
- Works closely with faculty and partner institutions in all phases of the study abroad process.
- Contributes to team approach with collaborative departmental initiatives.

Global Education Intern, Hobart and William Smith Colleges, Geneva, NY (May 2019 – July 2019)

- Gained in-depth understanding and utilization of pre-departure and re-entry programming techniques to engage students throughout the critical learning periods of their study abroad experiences.
- Redeveloped goal-setting workshop through multiple rounds of collaborative revisions and research.
- Edited and reviewed upcoming volume of *The Aleph: a journal of global perspectives*.

Study Abroad Graduate Assistant, Old Dominion University, Norfolk, VA (August 2018 – September 2019)

- Advised students regarding cultural adjustments, health & safety, course approvals, visa procedures, etc.
- Advised club for study abroad returnees to promote global learning on campus.
- Organized and led pre-departure and re-entry orientations for study abroad students.
- Assisted with entry process and orientation for incoming exchange students.
- Managed foreign transcript processing for transfer credit evaluations upon students' return.
- Managed biannual Study Abroad Fair, attended by 500+ students.
- Assisted with Terra Dotta system, office marketing, and social media outreach.
- Served on committee to interview and nominate qualified students for international exchange programs.
- Conducted information sessions, group advising, and drop-in advising for students.

Child Development & Diversity Program Assistant, DIS Study Abroad in Scandinavia, Copenhagen, Denmark (July 2017 – August 2018)

- Utilized crisis and risk management skills when leading international and domestic student travel.
- Planned and co-led five multi-day study tours; responsible for visit logistics, student wellbeing, and all money on tour; maintained communication with co-leader, students, and emergency contacts.

- Managed program finances and accounting for personal company expenses and faculty expenses.
- Elected by colleagues as a peer representative to support and liaise between peers and HR.
- Organized and executed program orientations for incoming students each semester.
- Held 1:1 appointments with high-risk students to provide support and advise on strategies for success.
- Arranged and led field study trips for various program courses across Copenhagen.

Global Leader of Gettysburg College, Gettysburg College, Gettysburg, PA (September 2016 – May 2017)

- Practiced mentorship, scholarship, and activism by intentionally applying knowledge and skills learned abroad; selected as a student representative at Pre-Departure Orientation and Family Weekend events.

Residential & First-Year Programs Experience

Extended Orientation Coordinator, Gettysburg College (May 2016 – June 2017)

- Enhanced and ran an extended orientation program for first-year students designed to empower students to learn about, engage in, and plan their college experience.
- Managed over 90 scheduled events in a six-month timeframe.
- Oversaw eight student assistants and collaborated with campus partners.

Community Advisor, Gettysburg College (August 2014 – May 2015)

- Oversaw residential experience of 60 students, focusing on community building and providing encouragement and resources regarding campus involvement and ownership of the college experience.
- Utilized Sophomore Success Plan framework to intentionally support the needs of second-year students.

Student Programming Experience

Traditions Chair, Campus Activities Board, Gettysburg College (August 2016 – May 2017)

- Managed \$20,000+ budget, planned, and executed four large-scale traditional events.
- Led weekly planning committee meetings focused on student voice and peer involvement.
- Established and ran the first Annual International Food Festival, attended by 1,000+ students.

Movie Nights Chair, Campus Activities Board, Gettysburg College (August 2014 – May 2015)

- Managed budget, planning, and execution of movie events on- and off-campus.

Research Experience

Independent Research (June 2016 – May 2017)

- Developed and conducted empirical research project on identity development in international college students; wrote and presented a full research report utilizing collected data and statistical analyses.

Research Assistant for Dr. Kathleen Cain (September 2015 – May 2017)

- Conducted on-site interviews in Copenhagen, Denmark with Danish adolescents for a multi-year project; transcribed interviews, developed coding systems, coded qualitative data, etc.

Conference Presentations & Involvement

ROC Your Global Future, Study Abroad Returnee Conference, Rochester, NY (October 2019)

- Presented: *From WWOOFing to Working: A Sampling of Post-Graduation Opportunities Abroad.*

Society for Research in Child Development, Biennial Meeting, Baltimore, MD (March 2019)

- Co-authored symposium: *Religious Identity among Immigrant-Origin Muslim Adolescents in Denmark and the United States.*

Society for Research in Child Development, Biennial Meeting, Austin, TX (April 2017)

- Co-created and presented research poster: *"It feels like a renewal": Religious Identity and Spirituality in American Muslim Adolescents.*

First-Year Experience, 36th Annual Conference, Atlanta, GA (February 2017)