

Transformation Theory as a Framework for Understanding Transformative Learning*

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Introduction

The first part of the present Introduction to Mezirow's translated book outlines the formulation process of his theory, and the second Part presents its constituent components. The third part discusses the relationship between Transformation Theory and "transformative learning theory" and puts forward the opinion that the former constitutes a focal point of reference within the wider theoretical field of transformative learning, which includes diverse conceptualizations. In the last two parts, a reference is made to the book's translation and suggestions are offered as to the creative and critical approach to its content.

1. The formulation of Transformation Theory

In the beginning of his career, Jack Mezirow (1923-2014) was an expert in community development and adult education issues. He worked for several years as an international organization consultant for adult literacy and community development programs in Asian, African and Latin American countries until 1968, when he became Professor of Adult Education at the Teachers College of Columbia University in New York. His initial outlook on adult education had mainly been influenced by the works of Bateson, Blumer, Dewey, Fingerette, Gould, Kuhn, Schutz and Socrates (see Kokkos, 2019), however, under the influence of Freire and Habermas's ideas, his views gradually became more groundbreaking and went on to incorporate the dimensions of critical awareness and transformation of stereotypical assumptions.

In 1978, Mezirow proposed Transformation Theory through his article *Perspective Transformation* (Mezirow, 1978a). The formulation of his theory was pivotally influenced by his own experience of watching his wife Edee's journey, who resumed her university studies during the 1970s, after having stayed away for a long period of time for personal and professional reasons. Like many other American women who returned to university study in those days, Edee had a powerful experience which went through various stages, such as feeling, initially, disorientation and doubt as to the outcome of her effort, and then stress

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when difficulties arose, engaging in critical self-reflection in order to gauge the situation and recast it in a more functional direction, sharing ideas and feelings with other female fellow-trainees, developing an action plan in order to overcome adversities and, finally, taking action according to her revised assumptions. Mezirow accompanied Edee in her endeavours and tried to use his own theoretical lens to understand them. He began to realize that his wife was going through a transformative experience, both in terms of her perspectives, as well as concerning the way in which she dealt with her new experience, while similar testimonies were being shared by her female fellow-students. He then decided to carry out extensive research on the journey of those women returning to university studies. The outcome was a research report entitled *Education for Perspective Transformation* (Mezirow, 1978b). This study analysed the process of perspective transformation and lent it investigatory depth and theoretical substance. Mezirow went on gradually to elaborate his perspective during the 1980s (Mezirow, 1981, 1985 α , 1985 β , 1989, 1990) and in 1991 he introduced Transformation Theory in its complete form in the original publication of the current book, entitled *Transformative dimensions of adult learning* (Mezirow, 1991 α).

2. Constituent components

The fundamentals of Transformation Theory, as outlined in Mezirow's 1991 book, can be summarised as follows:

- A central view, analysed in Chapters 1 and 2, is that we understand our experiences and, by extension, reality and our own selves, on the basis of values, perceptions, beliefs and interpretative rules which we have internalised in the past, during our socialization process, under the influence of family, the educational system, friends and the wider social and cultural context. Often, though, what we have learnt proves restricting and problematic, not being sufficient or suitable for the interpretation of our experiences in an open, discriminating, inclusive, comprehensive manner. In these cases, it is necessary to enter a transformative learning process in order to critically examine our dysfunctional assumptions and act according to our new outlook.
- *Meaning perspectives* and *meaning schemes* are the object of transformation. [Let it be noted that meaning perspectives were subsequently (1996a) renamed *habits of mind* and meaning schemes *points of view* by Mezirow]. Meaning perspectives are epistemic, sociolinguistic and psychological (Mezirow, 1991a). They constitute broad predispositions, which determine the way in which we interpret our experience and orient our behavior (Ch. 5). [In a later paper of his, Mezirow (2000a) identified three additional kinds of meaning perspectives/habits of mind, namely, philosophical, moral-ethical, and aesthetic ones, and finally, he (Mezirow, 2006) added the economic, educational, political, cultural and health habits of mind]. Therefore, an important element of Transformation Theory is that it addresses all life areas.

Meaning schemes are clusters of beliefs, feelings, judgments and concomitant behaviors. Similar meaning schemes are manifestations, specifications of a meaning perspective, through which the meaning perspective is expressed. In Chapter 3, Mezirow presented a hypothetical example. A woman adopts the stereotypical gender role (meaning perspective). One of the meaning schemes ensuing from this meaning perspective is that, after attending certain evening classes, the woman always hurries back home to cook for her husband. Mezirow pointed out that there are “more meaning schemes deriving from the same stereotypical role” (p.94). We can reasonably assume that he referred to the multiple meaning schemes relating to gender relations, child-raising, women’s position in the world of work, etc.

- Meaning schemes are more easily transformed than meaning perspectives. For the latter to be transformed, the extremely demanding process of critical reflection on our previously formed fundamental assumptions (premise reflection) must take place. This means reflecting upon “*why* we perceive, think, feel, or act as we do” (p. 108), or, in other words, upon the causes which gave rise to our problematic perspectives in the past. This process is not necessary for meaning schemes to be transformed. Later on, Mezirow (1994, p. 224) claimed that the transformation of meaning schemes can be an “everyday phenomenon”, which occurs through deductions stemming from experience or other people’s influence.
- The ultimate goal of Transformative Learning is to review problematic meaning perspectives. However, Mezirow stressed (Chapter 4 Summary, point 6) that reviewing meaning schemes is a form of transformative learning too. He went on to clarify (Chapter 3) that the accumulation of successively transformed, similar meaning schemes may lead to the transformation of the meaning perspective of which they form part. This view is of great importance for the formulation of educational strategies by educators. Depending on the transformative goals which they set, the available time frames, as well as the characteristics, interests and needs of the learning group, they will have to determine whether an attempt will be made at transforming either a meaning perspective- whereupon they will have to specify the individual meaning schemes which require transformation and the manner in which this will be performed (focusing and sequencing of actions, educational techniques) or one or more meaning schemes, whereupon they will once more have to specify the manners in which the endeavor will be made (Kokkos, 2017).
- A crucial means to the achievement of the transformative process of learning is *critical reflection*. Mezirow proceeded to a clarification of paramount importance (Ch. 4, Unit “Non Reflective and Reflective Action”). Contrary to the dominant view in academic circles, critical reflection is not identical with or restricted to the thoughtful process which includes judgments, interpretations, analyses,

generalizations, evaluations, inferences etc. According to Mezirow, critical reflection additionally includes deliberately reviewing and questioning the validity of assumptions. It can assume three different forms: a. *content reflection* – reflection on *what* we perceive, think, feel, and act upon. b. *process reflection* – examining to what extent the way in which we approach an issue is justified and based on reliable criteria. c. *premise reflection* – reflecting on the causes which have in the past led us to adopt assumptions vital to us, which have proven problematic. As previously mentioned, the last form of critical reflection is a necessary condition for the transformation of meaning perspectives to take place.

- The transformative process goes through certain phases, which have been identified by Mezirow's aforementioned study (1978b) and have been confirmed by subsequent studies (Ch. 6, Unit "Outlines of the Transformation Process"). The importance of identifying the phases lies in enabling educators and researchers to detect the point at which a group of learners, and each individual participant, are on their transformational journey, as well as whether transformations have occurred since the beginning of the process.
- The principles and standards according to which a transformative learning group interacts are included in the outlook on reflective discourse, which Mezirow drew from the work of Habermas. Reflective discourse lies in the fact that, realizing that their assumptions need to be subjected to a validity test and undergo critical investigation, the interacting individuals enter a process where they seek, through empathy, mutual respect and mutual influence, the best possible approach, which, for this reason, is a collective achievement and encapsulates the possibility of arriving at consensual action plans. Through this process, learning groups become core cells of democracy, where the participants learn critically to examine issues, seek convergences and build synergies.
- Moreover, the relation of transformative learning to practice was defined by Transformation Theory. Action, stemming from a reviewed, more functional perspective, is always the aim. However, according to Mezirow, action is not pursued in a mechanistic or blindly activist fashion. It should ideally occur as the amalgamated awareness of the reasons creating a problematic situation, as well as of the consequences which can be brought about by a change of circumstances. Moreover, an important action does not necessarily have a collective, socio-political character; it could also refer to the motivation of individuals or small groups; forms of action which have a social dimension nonetheless, given that they are shaped within a specific social context, are then disseminated across the social surface, influence the social fabric and transform it. The importance of Mezirow's particular outlook lies in the fact that he does not underestimate, but, on the contrary, highlights individual or group efforts to better their life conditions, e.g. within an educational organization, a professional group or a family.

- Another important contribution of Transformation Theory in my view is the stance taken on the role of adult educators contributing to transformative learning (Chapter 7). Educators do not by any means impose their opinion on the participants. Their role lies in posing critical questions and creating conditions for reflective discourse. “To help a learner become aware of and assess alternative meaning perspectives for viewing a problem is not to tell the learner what to do but only to present different sets of rules, and criteria for judging” (p. 203). Within this framework, Mezirow proposed a series of actions which aim both at encouraging participants critically to reassess their assumptions, and at gradually becoming less dependent on the educators’ influence, so that they can become self-directed learners. These actions include, among others (pp.199-200): help the learners understand how to use learning resources; assist the learners to define their learning needs; expand the learners’ range of options; foster a self-corrective, reflexive approach to learning; reinforcing the self-concept of the learners; emphasize experiential, participative, and projective instructional methods; provide a supportive climate with feedback to encourage provisional efforts to change and take risks.

Finally, Mezirow’s book includes a generous presentation of epistemological views which share affinities with his own one, as well as research data and examples relevant to reviewing problematic assumptions (large parts of Chapters 1, 2, 6). Let it be noted that among the most conspicuous references are those expressed by European scholars, such as Adorno, Bateson, Foucault, Gramsci, Griffin, Habermas, Heron, Jarvis, Piaget, Popper, Wittgenstein, as well as Freire’s ideas, which is Mezirow’s contribution towards exploring the theoretical horizon of transformative learning beyond American literature. Despite being written more than thirty years ago, these parts of the book are worth studying for the interesting approaches presented in them, as well as for their contribution to raising awareness of the influences Mezirow was exposed to and the manner in which he processed them.

3. Transformation Theory and “transformative learning theory”

After the book’s 1991 publication and for an entire decade, Mezirow’s written work focused on discussing Transformation Theory so as to make it widely accessible, while at the same time responding to successive criticism leveled at it. It is telling that among the fourteen papers he published between 1991 and 2000 (Mezirow, 1991b, 1992, 1994, 1995, 1996a, 1996b, 1996c, 1997a, 1997b, 1998a, 1998b, 1998c, 1999, 2000a) eight include the term Transformation Theory in their title and six of them are written as a response to critical comments¹. This extensive public discourse, which was mainly hosted in the *Adult Education*

¹*Transformation Theory and cultural context: A reply to Clark and Wilson* (1991b); *Transformation Theory: Critique and confusion* (1992- a response to Cunningham); *Understanding Transformation Theory* (1994 – a response to Newman and Tennant); *Transformation Theory of adult learning* (1995); *Transformation Theory out of context* (1997a – a response to Newman); *Postmodern critique of Transformation Theory: A response to Pietrykowski* (1998a); *Transformation Theory: Postmodern issues* (1999 – a response to post-modern thinkers); *Learning to think like an adult: Core concepts on Transformation Theory* (2000b).

Quarterly magazine, enabled Mezirow to clarify his theory and lend more depth to it. Meanwhile, the interest of the adult education community in transformative learning rose sharply. Taylor (2000) reported that since Mezirow's theory first appeared "it has received more attention than any other adult learning theory" and "at the 1997 annual Adult Education Research Conference transformative learning was central [...] more than any other topic" (p. 285). Mezirow himself (2000b) remarked that "this movement (of transformative learning) has produced several books, well over fifty doctoral dissertations, dozens of conference presentations and articles, and a continuing spirited discourse in the journal *Adult Education Quarterly*" (p. xi).

Two questions are posed at this point, though: firstly, why, these days, despite continuing to attract significant attention¹, Mezirow's work is hardly attributed its genuine title (Transformation Theory) by authors and educators, but is usually referred to in various other ways, such as, for example, "Mezirow's transformative learning theory" (Moore and Bovill, 2022), or "Mezirow's theory of adult learning" (Baumgartner, 2012); and secondly, why is the term "transformative learning theory" dominant in the literature? The questions are vital, as the answer can signify whether Transformation Theory, and by extension this translated book, carry central importance and relevance, or mere historical interest. For the questions to be answered, certain key events which took place in the field of transformative learning over the past thirty years are examined in the following paragraphs.

Since the 1990s, and particularly the beginning of the 2000s, due to the impact of the discourse on transformative learning, several interpretations of and theoretical approaches to it began to appear and grow in number. These perspectives at times discussed, elaborated on, and enriched Mezirow's view (e.g., Cranton, 2016; Eschenbacher and Levine, 2022; Fleming, 2018; Kokkos, 2020; Mälkki, 2010; Romano, Bracci, & Marsick, 2022). Simultaneously, all the more frequently, other perspectives went on to express alternative or different conceptualizations. The repeated records of emerging perspectives presented by Taylor are characteristic. He claimed (Taylor, 2008) that in the beginning of the 2000s three alternative views to Transformation Theory had emerged: *psychoanalytic* (with Boyd, Meyers, Dirkx as its chief exponents), *psycho developmental* (Kegan, Daloz), and *social-emancipatory*, which was founded on Freire's work. Taylor went on to add that by 2008 four additional views had appeared: *neurobiological* (Janik), *spiritual* (Tisdell), *race-centric* (Sheared, Johnes-Bailey), and *planetary* (O'Sullivan). Four years later, Taylor and Snyder (2012) identified four additional views (*Africentrism*, *critical theory*, *critical social theory*, and

¹Nylander, Österlund, & Feyes' research (2017) on adult learning in five key international magazines showed that citations to Mezirow's work are more numerous than to the work of other transformative learning scholars. An additional evidence is that in the recent handbook on transformative learning, edited by Nicolaidis, Eschenbacher, Buergelt, Gilpin-Jackson, Welsh and Misawa (2022), 37 out of 52 pieces of writing (71%) refer to Mezirow's view. It should be noted, however, that this seems to be a declining trend. Indicative of this is that ten years ago, in Taylor and Cranton's respective handbook (2012), respective citations amounted to 92%.

new grief theory). These days, one can identify at least two more new views, *transformative sustainability learning* (Lange, Ross) and *sociocracy* (Buck, Villines).

This process resulted in a dominant view that a “theory of transformative learning” is constantly evolving, shaped through the contribution of an array of thinkers, with a diversity of perspectives coexisting in its framework. As a result, Mezirow’s view came to be regarded by many as being *one* of the multiple sources of the theory. This gradual shift of central interest from Transformation Theory towards a range of varied perspectives possibly accounts for the reason why Mezirow’s theoretical work is rarely referred to by its genuine title when talked of in the literature. What is signified, is that his theory is widely regarded as no more a fundamental, distinctive component of the theoretical field of transformative learning, but one which, in a way, has been assimilated into it.

The result of this development was twofold. On one hand, Mezirow’s initial theoretical concept was enriched and expanded with regard to important aspects underdeveloped in his work, such as the role of emotions in transformative learning (e.g., Mälkki, 2019); the unconscious learning processes (e.g., Dirx, 2012a); the connection between transformative learning and Frankfurt School’s perspective (e.g., Fleming, 2022); exploiting the contribution of neurobiology (e.g., Taylor and Marienau, 2016); interconnecting individual and social transformation (e.g., Finnegan, 2019); the transformative function of artistic expression (e.g., Laurence, 2012), etc. On the other hand, however, the continuous emergence of new, often unconnected to each other, approaches, caused fragmentations and inconsistency in the developing field, as well as confusion as to its precepts and constituent components. Several approaches are characterized by diverging target areas and correspondingly different definitions of transformative learning, such as: reviewing problematic assumptions through critical reflection and concomitant action (Transformation Theory), exploring the unconscious processes (psychoanalytic view), development of orders of consciousness (psycho-developmental view), knowledge construction through unconscious and symbolic processes (spiritual view) and so forth. Moreover, the number of papers that frame themselves into “transformative learning theory” is increased, while they only have a few or even no interconnections at all with Mezirow’s theory or with the papers of leading transformative learning scholars¹.

As a result, Cranton and Taylor (2012) claimed that “transformative learning theory becomes a theory that may begin to lose its relevancy for the study of adult learning” (p. 13) and highlighted the danger of a “problematic plunge into a fragmented theory” (p. 11). Other

¹To the leading scholars of the transformative learning field could be included indicatively, but not exclusively, the following: the Stewards of transformative learning, the members of the Leadership Circle of the International Transformative Learning Association/ ITLA, the reviewers of Jack Mezirow Living Theory of Transformative Learning Award, the reviewers of Patricia Cranton Distinguished Transformative Learning Dissertation Award, the members of the Steering Committees of the International Transformative Learning Conferences, the members of the ESREA’s Network ‘Transformative and Emancipatory Adult Education’.

scholars pointed out that the identity of the field is becoming fluid (Dirkx, 2012b; Hoggan, 2016; Illeris, 2014a, 2014b; Kokkos, 2014, 2019). As Illeris puts it (2014b, p. 150):

Today, all of this has created a situation, in which, although the issue of transformative learning is more demanded and also more celebrated than ever, there is a basic conceptual uncertainty and even confusion as to what this term actually includes, covers, and implies.

Recently, Nikolaidis and Eschenbacher (2022) claimed that “there remains a lack of consensus into most aspects of transformative learning theory and how it operates” (p. 11).

Mezirow’s own attitude is of particular interest. In 2000, within the context of the collective volume which he edited, entitled *Learning as Transformation* (Mezirow & Associates, 2000), in the last chapter which he co-authored with Aalsburg Wiessner (Aalsburg Wiessner & Mezirow, 2000), he expressed his expectation for the possibility of interested thinkers’ collectively developing an expanded “transformative learning theory”. However, he stressed that for this to happen, there was a fundamental condition: those who would cooperate in the development of the theory would have, through continuous reflective discourse, to seek common grounds and interconnections among their views, so as to “become co-researchers in a process of collaborative inquiry” (p. 330). In that way, the developing theoretical construction could obtain cohesion and its parts – the individual theoretical views – could be combined.

How to connect the pieces of the puzzle in order to create a picture of transformative learning is a challenge facing scholars and practitioners (p. 329).

Instead of each person holding onto his or her separate pieces, they are combined and an overview can be achieved (p. 341).

There is still much to learn about transformative learning. But the greater challenge is to work toward finding common ground among our many diverse but related theories of learning (p. 356).

We need to collaborate across disciplines, theories, and paradigms to build a comprehensive theory of adult learning to guide educators of adults (p. 356).

As a result, Mezirow bestowed on the aforementioned collective volume the characteristic subtitle *Critical perspectives on a theory in progress* and spoke of a “transformative learning movement” (Mezirow, 2000b, p. xi).

However, in subsequent writings, Mezirow (2003a, 2003b, 2006) did not return to the idea of a collectively constructed theory – realising, perhaps, that the predominant tendency in the theoretical field of transformative learning was shifting away from the ideal of seeking convergences – and limited himself to the analysis and defence of the components of Transformation Theory. In yet another of his writings (Mezirow, 2009), he once again made

no mention of a cohesive formulation of a theory. For the largest part of the paper, he focused on the explanation of Transformation Theory, and in a next part he introduced certain other views which he deemed relevant to his. Finally, for his last publication, in the context of Taylor and Cranton's *Handbook of Transformative Learning* (2012), he chose to republish one of his earlier texts (Mezirow, 2000a) referring exclusively to his theory, under the characteristic title of *Learning to think like an adult: Core concepts on Transformation Theory*.

According to the above, three understandings can be drawn. The first one is that, within the expanded but fluid theoretical field of transformative learning, Transformation Theory is a focal point of reference, given that it is the primordial outlook in terms of which thinkers in the field converse in their majority. The second understanding is that Transformation Theory is a cohesive theoretical body within the field, yet open to enhancement. The third understanding is that "transformative learning theory" is a rich field of theoretical perspectives which are, nevertheless, frequently unconnected and have different conceptual tools; therefore, it could be maintained that the field does not possess basic characteristics constituting a theory.

For these reasons, Mezirow's Transformation Theory could be considered as a crucial frame of reference for the understanding of transformative learning.

4. The translation process

George Koulaouzides, who undertook the translation of the book and Effrosyni Kostara, who provided the language editing did a great job. A central issue of concern in our collaboration during the translation process was translating certain key concepts. For example, at certain points in the text, Mezirow spoke of "reflection" and, at others, of "critical reflection". However, a careful study of the context, as well as of later writings of his (Mezirow, 1997b, 2000a) indicates that, when he referred to his personal outlook on transformative learning, he identified the same process through use of these two concepts. Therefore, we chose to use the concept of "critical reflection" in all relevant points of the text, given that the critical approach to learning permeates Transformation Theory in its entirety.

Another instance of conceptual clarification relates to the word "premise", which Mezirow used in order to identify a kind of assumptions, or the critically reflective process. From the context, it appears that Mezirow was talking about the fundamental assumptions – or the critical reflection thereupon – which humans have formed in the past within the context of their socialization. For that reason, we favored the translated clusters of "previously formed fundamental assumptions" and "critical reflection on previously formed fundamental assumptions" respectively.

Additionally, we attached particular importance to rendering Mezirow's personal style of writing as far as possible. He did not express "out-and-out" arguments, but attempted to approach issues in a dialectal manner, critically examining as many of their facets as possible. As a result, he often used words or phrases (e.g., "may", "may not always", "can become", "often", "it is possible", "perhaps", "attempt to", "appears to", "tends to" and so on) which

allowed the nuances of an issue, the discourse on it and its evolving dimensions to shine through. With this in mind, we often selected concepts signifying the exploration, coherence and interrelation of ideas or events, for example, translating the concept of “process” with the Greek word signifying the interrelation of evolving ideas and events, instead of using the Greek word for “procedure”, which alludes to a linear, rigid series of events.

5. Exploring the book

We would not recommend studying this book statically, as a snapshot of Mezirow’s outlook at a particular point in time. It is necessary to take into account the process which preceded its writing, as well as its role and influence across the time-frame during which the field of transformative learning and, more generally, adult education were shaped. It is also necessary to study the book in conjunction and in comparison with other writings by Mezirow, as well as in association with congruent theoretical views, aiming at a more integrated understanding of transformative learning. What is more, this book should not be considered a “closed” text, allowing no dispute or enhancement. Its author himself went on, after the initial publication, to modify key concepts, work further on certain parts, focus more, or less, on others and claim that certain concerns of his view require further investigation, such as the essence of the transformative learning process taking place in the unconscious (Mezirow, 2006), and the role of emotions, imagination and intuition in transformative learning (Mezirow, 2009). Finally, he often maintained that the validity of a theoretical conception holds until critical reflection upon it or subsequent circumstances warrant its revision.

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