

## What was ultimately J. Mezirow's perception of the role of emotions in Transformation Theory?

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### Abstract

This article attempts to contribute -with bibliographic data- to the constructive dialogue that continues to evolve around the emotional dimension of learning, within the framework of Transformation Theory (TT). It presents the findings of a literature review - as part of a doctoral thesis - regarding the significance that Mezirow himself attaches to the role of emotion in a transformative process. The research was conducted using the content analysis technique of primary sources, namely the texts of J. Mezirow. The research findings indicated that Mezirow linked emotion to the key elements of his framework: the object of transformation, the means, the phases of the process, the taking of action, and the role of the adult educator. These constitute the "strong" points of the emotional dimension of his theory. On the other hand, points were identified that Mezirow chose to touch upon only superficially or not to analyze further, such as a more detailed examination of the relationship between the emotion of critical reflection in each phase of the process, the recognition and utilization of positive emotions, and proposals for specific techniques for the emergence and management of emotions in practice. Ultimately, the research highlighted that Mezirow, despite any omissions, managed to synthesize a comprehensive theory with a relative balance of rational and emotional elements. In his effort to keep the boundaries of adult education distinct from psychotherapy, he didn't go any deeper into issues in which he had not delved, leaving them open to more specialized theorists in the field.

**Keywords:** transformative process, rationality, emotions

### 1. Introduction

The Transformation Theory by J. Mezirow currently gathers the most attention today in the international field of Adult Education (Hoggan, 2016; Kokkos, 2022; Nicolaidis & Eschenbacher, 2022; Cranton & Taylor, 2012; Raikou & Karalis, 2016). Furthermore, the robust dialogue surrounding it, demonstrates that it is an open and evolving theory (Mezirow, 2000a; Fleming, 2022). In this context, several texts by Mezirow have been critically discussed. Many theorists mention that one of the central points of criticism has been the excessive emphasis on the rational element at the expense of emotion (Cranton & Taylor, 2013; Kokkos, 2022; Nicolaidis & Eschenbacher, 2022). Based on this viewpoint, significant scholars of transformative learning have attempted to construct a new perspective, in which the emotional and inner world of learners play a significant role. However, some of the approaches that were developed, introduced elements that are often discordant and foreign to the foundation laid by the originator of TT (Cranton & Kacukaydin, 2012; Kokkos, 2022; Mälkki, et al., 2017; Newman, 2012; Taylor & Snyder, 2011). Cranton and Taylor (2012) share

the same view, emphasizing that the low awareness of the components of TT leads to the development of practices incompatible with this specific theoretical orientation.

For these reasons, an in-depth exploration of Mezirow's perception, based on what he explicitly and implicitly states, as well as what he omits, regarding the role of emotion in TT - which is neglected from the literature- was considered purposeful. Subsequently, this article aims to fill this gap, contributing in this way to what was also the goal of the thinker himself (Mezirow, 2000b), the search for a common ground. This occurs when one takes into deep consideration the perspective of another, critically examines it, expands it, transforms it, and thus organically incorporates it into their approach, that is what Mezirow calls reflective dialogue. The article has the following structure: first, the methodology chosen is presented to clarify the reasons for the validity of the findings. Next, the research findings are presented regarding the research question: "What significance does the concept of emotion have in J. Mezirow's TT, and how it evolves?" The article concludes with final thoughts and discussion.

## **2. Method**

The research presented is bibliographic research (Karakou, 2023), which was conducted using the technique of content analysis. In this context, 26 texts of the American thinker were examined, i.e. 85% of his total work, to achieve the investigation, understanding, presentation, and documentation of the long-term evolution of his thinking about the importance of emotions in TT. These texts were analyzed semantically focusing on concepts and meanings that contained emotions (Glesne, 2015). Regarding the way of measuring the semantic elements, it was chosen to do a combination of qualitative and quantitative types of analysis, to emphasize not only the presence or absence of an opinion but also its intensity and frequency of occurrence (Vamvoukas, 2010). In particular, our interest focused both on the frequency of occurrence of the sections that were considered revealing clues to Mezirow's understanding of emotion, as well as the weight he attributed to it, and the degree to which he delved into the issue.

Subsequently, based on the themes that emerged from the preliminary study of the material, the categories of analysis were selected. In this review, an attempt was made for the choice of categories to cover both the criterion of non-ambiguity since Mezirow's opinion on emotion was not stable throughout his entire work, and the criterion of significance. To ensure the second criterion, the degree of correlation between emotion and the key structural elements of TT was examined, which, according to important scholars of Mezirow (Baumgartner, 2012; Cranton & Taylor, 2012; Kokkos, 2022; Fleming et al., 2022), as well as the theorist himself (Mezirow, 2007), includes the object of transformation, the means of transformation, the phases of the transformative process, the assumption of action, and the role of the adult educator. According to the above, five categories of analysis were chosen:

1. Correlation of emotions with the object of transformation
2. Correlation of emotions with the means of transformation, i.e., critical reflection and reflective discourse
3. Correlation of emotions with the phases of transformation
4. Correlation of emotions with the assumption of action
5. Correlation of emotions with the role of the adult educator, concerning the exploration of emotions and the techniques that can be applied to utilize them in educational practice

For the findings related to the above categories, the process of analytical data processing (Have, 2007) was followed, going beyond the explicit level of data to an "interpretive" level, asking the following questions:

- What does Mezirow mention or not mention regarding emotions?
- How many sections in each text relate to this topic, and what period do they cover?
- How much importance does he attribute to it (with which issues does he connect it, how clear is the connection he makes)?
- How deeply has he delved into the topic (how much does he delve, what influences has he had, what sources does he utilize)?

We believe that the chosen methodology and the aforementioned criteria contribute to clearly depicting Mezirow's perception of the role of emotion.

### **3. Findings**

Next, the findings of the research regarding the correlation of emotion with the basic elements of TT are presented.

#### **3.1 Correlation of Emotions with the Object of Transformation**

From his early texts, the philosopher had already settled on the idea that the object of transformation is linked to psychological factors on multiple levels. On one level, he acknowledged that emotions are inherent in the very nature of the assumptions that make up cognitive structures, such as mental habits and perspectives (Indicatively Mezirow, 1978a, 1991a). On a second level, he identified certain deep psychological factors that set priorities, determine relevance, and focus attention while ultimately distorting cognitive structures. We are referring to childhood traumas (Mezirow, 1990a; 1991a) and defense mechanisms (Mezirow, 1981, 1990a, 1991a). Mezirow, drawing from Gould for childhood traumas and from Goleman for defense mechanisms, provided substantial explanations for how these two processes correlate with negative and threatening emotions, how they can lead to self-deception and fixation, and ultimately how they can function as obstructive barriers to transformation. Finally, on a third level, he emphasized the significance of the influence of the sociocultural framework in shaping cognitive structures through the appropriation of symbolic patterns. These patterns encompass the questioning of an individual's most significant and emotionally charged relationships in life (Mezirow, 1990a, 1991a).

From the above, it becomes evident that the philosopher attributed great importance to emotions related to the object of transformation. He revisited this theme several times, especially during the early stages of his journey, until 1991 when he published his seminal work. His perception was that the exploration and management of emotions should precede transformative learning chronologically to activate it. However, he mainly confined himself to observations and did not delve into a deeper exploration of the subject, explaining, for example, how the acceptance and/or management of negative emotions that distort reality can be achieved, what methods can be used to address fixation and self-deception, or how an individual can cope with the internal struggle and be aided in the process of inner exploration aimed at understanding the difference between emotions rooted in childhood traumas and those related to the daily pressures of life.

#### **3.2 Correlation of Emotions with the Means of Transformation**

Regarding the two pillars of Transformative Learning, critical reflection, and reflective dialogue, the research revealed that Mezirow's thinking has undergone overtime shifts that link these two processes with emotions. About critical reflection, there is an evolution in his thinking. Until 2000, his perception was that it was intricately linked with emotions bidirectionally. On one hand, critical reflection generates a threatening and intensely emotional state (Indicatively Mezirow, 1978b, 1981, 1998a). On the other hand, emerging emotions require critical reflection for the recognition of specific beliefs, perspectives,

meanings, ideas, or even habits that accompany the way of observation, thought, or action. (Mezirow, 1981, 1990a, 1995, 1998a). All these ideas resurface and enrich the concept of critical reflection in his work in the 2000s, especially in the chapter he contributed to the collective volume "Learning as Transformation". Furthermore, Mezirow adopted new elements, such as the concept of emotional intelligence, which led to a broader perspective on critical reflection. In this context, Mezirow (2000a) argues that the threatening emotional experiences that accompany critical reflection upon cherished beliefs (a leap into the unknown, as he characterizes this process to emphasize the intensity of the threat) can only be managed if the qualitative characteristics of emotional intelligence have developed. These characteristics include the ability to recognize, manage, or redirect emotions, the ability to control pressure for adaptation to changing situations, and the development of feelings of courage. Therefore, we understand that, from 2000 onwards, he started to see emotion as an integral part of the reflective process, considering emotional intelligence as a prerequisite.

Regarding reflective discourse, it was found that until 2000, the references mainly focused on the rational dimension of the concept. There are only a few exceptions, such as the reference to therapeutic dialogue, the object of which is the recognition and management of emotions (Mezirow, 1991a), as well as some brief mentions of the role of relationships (Mezirow, 1989b) and empathy (Mezirow, 1996, 1997, 1998b). Between 2000 and 2003, after about twenty years of creative ferment, Mezirow makes a turning point and presents a more enriched perspective on reflective discourse. He primarily draws elements from Goleman's concept of emotional intelligence (Mezirow, 2003, 2000a). Based on this, he highlighted emotional maturity as a prerequisite for participation in reflective discourse, recognizing the need for the development of two important emotional skills: self-regulation and empathy.

All of the above are significant steps toward mitigating the rational character of the means of transformation. However, a deeper exploration of the interactive relationship between emotions, critical reflection, and reflective discourse is missing.

### **3.3 Correlation of Emotions with the Phases of the Transformative Process**

Regarding the phases of the transformative process, the content analysis findings reflect that Mezirow primarily focused on the emotional constraints in the early phases, the disorienting dilemma, and the self-examination phase.

Mezirow's perception of the disorienting dilemma over time is that it is accompanied by intense and threatening emotions, as it is usually linked with either a dramatic event or a sense of disharmony (Mezirow, 1978a, 1978b, 1981, 1985, 1990a, 1991a). Especially in the first case, Mezirow (1978a, 1978b) recognized that the dilemma caused externally is typically less negotiable, more intense, and emotionally charged. Consequently, it is more likely to lead to a perspective transformation. He even believes that the emotional pressure accompanying the disorienting dilemma is crucial for the entire process's outcome (Mezirow, 1978a).

Therefore, Mezirow, on the one hand, recognizes the emotional nature of the disorienting dilemma and, on the other hand, considers it necessary for transformation. For this reason, he deemed the self-examination phase as essential, given that in this phase following the realization of loss, the individual ceases to be the same and is called upon to experience an intense and emotionally charged phase of life. To support the role of emotions in this phase with research data, he drew on elements from his research and related research from the field of Mezirow's Theory of Transformative Learning (Morgan, 1987; Williams, 1986; Hunter, 1980, in Mezirow, 1991a), which he observed converged in highlighting the intense emotional intensity in the early stages, described as shock and disorientation, pain, and rejection. Furthermore, he identified common behaviors in the above research, mainly in terms of a kind of immobilization resulting from the failure to manage negative emotions in the second phase, which obstructs learners from committing to and progressing in the transformative process

because it appears particularly demanding and threatening to them. Subsequently, he recognized that special emotional strength is required for learners to overcome their fears and advance in the transformative process (Mezirow, 1991a).

So, for the first two phases, a strong connection with emotions is identified, perceived as "intruders" that disrupt the learning processes. We, therefore, arrive at a similar point to what we saw in the section on critical reflection: Mezirow mainly referred to negative emotions and considered their processing as a prerequisite for transitioning to the remaining phases of the transformative process. What is missing is the reference to possible positive emotions. On the other hand, even in the case of limiting ourselves to negative emotions, we lack a more nuanced approach to interpreting and analyze emotional processes and how they function in-depth, and especially to provide specific suggestions for management and, why not, their utilization for the benefit of transformation.

### **3.4 Emotion Correlation with Taking Action**

For Mezirow, taking action is closely linked to Transformative Learning. This idea serves as a constant reference point for the scholar (Indicatively Mezirow, 1978a, 1991, 1994a, 2000a). He believed that taking action largely depends on what an individual's emotional state dictates. He realized that to guide a person to the final stage of transformation, one needs to activate not only their cognitive abilities but also their emotional energy to overcome the negative emotions that tend to hinder progress (Mezirow, 1991a, 1998a). In the end, he concluded that emotional maturity is a prerequisite for taking action. The characteristics of emotional intelligence, such as recognizing and managing emotions, creating self-motivation, understanding the emotions of others, self-regulation, and self-control, are deemed essential conditions for transformative learning (Mezirow, 2000a).

To sum up, Mezirow recognized that the ultimate goal of transformation, taking action based on new, revised perspectives, depends largely on the successful management of negative emotions that tend to hinder progress. On the one hand, we see that the scholar adequately developed this issue, perhaps because it is a familiar topic in the field of adult education. On the other hand, we see a repetition of the same reasoning: only negative emotions are acknowledged, and positive ones are completely omitted.

### **3.5 The Role of the Adult Educator in Emotion Management in Transformative Learning**

Mezirow repeatedly refers to the role of the adult educator in his writings (Indicatively Mezirow, 1978a, 1990b, 1991a, 1995, 2000a, 2009), attributing to this role multiple dimensions. About the explored topic, Mezirow often refers to the educator-facilitator of relationship development and other times to the educator–counselor–encourager, which is in our opinion, **two** dimensions interconnected and difficult to distinct. The first dimension is indirectly related to emotions, as Mezirow consistently considered the role of supportive relationships significant in developing self-confidence, empathy, and emotional understanding of learners (ostensive see Mezirow, 1981, 1990b, 2000a). The second dimension is explicitly linked to emotions and encompasses several different levels. Firstly, it involves helping learners understand the reasons for their distorted assumptions and fostering critical reflection (Mezirow, 1978b, 1990a, 2006, 2009). It also relates to supporting learners in participating smoothly in reflective dialogue (Mezirow, 1981, 1991a, 2000, 2009). Furthermore, it involves empowering learners to take action (Mezirow, 1985, 1994a, 1995). Lastly, it concerns empowering learners to understand the emotional state they are in (Mezirow, 1981, 1995, 2000).

Based on the above, we understand that Mezirow sees the adult educator as the person who will strengthen learners on multiple levels. Especially regarding emotions, the scholar believed that adult educators can help primarily healthy learners feel that the educational process

meets their personal needs and preferences, develop self-confidence, feel secure in building trust relationships, express themselves emotionally freely, and receive counseling support for life transition issues. On the other hand, Mezirow was firm that the role of adult educators should not cross into the domain of psychotherapy as long as it concerns handling the emotions (perhaps one of the rare instances where Mezirow appears absolute on an issue). He, having delved into Gould's work, considered it an ethical issue for educators to intervene in emotions that emerge from psychological trauma, without the appropriate scientific background (Mezirow, 1991a).

#### **4. Discussion**

Through the content analysis of Mezirow's texts, an attempt was made to outline the philosopher's perception of the role of emotion in the key elements of Transformative Theory. Initially, it was an effort to capture this perception based on different periods. However, it was observed that this approach was not feasible for all categories as Mezirow focused on and analyzed each issue in different temporal moments, and his reasoning did not follow a linear path. We saw that in the early years of his creative journey, he was preoccupied with the connection of emotion with the subject of transformation, the phases of the transformative process, taking action, and the role of the educator in emotion management. Some of these issues, such as the psychological dimension of meaning structures and the interruption of taking action due to emotional barriers, were so settled in his perception that they consistently appeared in his latest writings. We consider this to have happened because the philosopher had established a solid foundation to support his positions, drawing elements from both neurobiology and fundamental psychological approaches such as cognitive and psychoanalytic theories. As it was also observed, there were two primary influences on him regarding these issues, Gould and Goleman.

On the other hand, the interconnection of emotion with the two main pillars of his theory, critical reflection, and reflective discourse, was established much later, around the year 2000. At that point, a significant shift in Mezirow's approach occurred, aimed at mitigating the rational character of his transformative tools. This change could be explained by two factors. The first factor might be the substantial criticism he faced regarding the emphasis on the rational nature of his transformative means. The second factor is that the volume from the year 2000 encompasses all the reflections developed for various issues - including emotion - in the First American Conference on Transformative Learning (1998), in which Mezirow opened the dialogue and allowed other theorists in the field to present their ideas. Mezirow knew and was unafraid to confront different viewpoints, and, as always open to dialogue, he acknowledged the areas he had not sufficiently developed in his theory. We could argue that these two factors played the role of disorienting dilemma, in his shift away from his orientation towards rationality. Therefore, the philosopher himself, while revisiting his theory, engaged in a transformative process regarding the role of emotion.

The elements we identified as having transformed to some extent in his thinking were his commitment to the concept of rationality as the exclusive factor in transforming dysfunctional assumptions and the gradual adoption of the viewpoint that non-rational factors, such as emotion, can play a significant role in the transformation of perspective. On the contrary, elements that were shaped very early on remained stable and/or were consistently reinforced. These elements included the recognition of emotional barriers related to the psychological dimension of cognitive structures, the development of defense mechanisms, childhood traumas, symbolic patterns, emotionally charged obstructive dilemmas, taking action due to emotional barriers, and the recognition of the need to manage intense negative emotions in the second phase of transformation.

We could argue that all of the above are the "strong points" of the philosopher concerning the recognition of emotions in TT. The goals set by Mezirow, such as self-awareness, self-integration, self-directed thinking, and ultimately the fundamental change in the way we perceive ourselves and the world around us, require deeper processes. The American philosopher acknowledges this. His work is permeated with the belief that learning is a process full of emotions: they are hidden in the cognitive habits that have become ingrained in our perception, they may stem from symbols and traumas internalized during childhood, and they emerge insistently when we feel threatened, hindering progress and action. Mezirow satisfactorily explained all of the above, highlighting points of convergence between TT and the theories of Goleman and Gould. Therefore, the philosopher's contribution lies mainly in the recognition of emotional barriers, without the management of which it is difficult to engage in a transformative process. His contribution lies also in the fact that despite the pressures he faced, he made sure to maintain clear boundaries between psychotherapists and adult educator so that the boundaries of educators would be clear. This serves as a protective barrier for both educators and learners, as uncontrolled emotional invocation could leave them vulnerable and unprotected. Similar positions have also been expressed by other philosophers, such as Gould (1988), Illeris (2014), and Kegan (2000).

On the contrary, points that we believe require a more detailed analysis and are therefore weaker are greater integration of emotional elements in the process of critical reflection and, above all, the recognition and utilization of positive emotions for the benefit of the transformative process. Additionally, it would have been useful if the philosopher had provided specific suggestions for the practical expression and management of emotions in all phases of the transformative process, such as the use of art or group dynamics. Mezirow had the appropriate influences. Regarding the issue of art, he knew and he could draw from Greene's work (Greene, 2000). He should also have had a solid foundation for group dynamics, as an adult educator. On the other hand, the fact that he did not do so, means that he had not delved deeply into these issues. Subsequently, this fact strengthens his theory more than it weakens it, from the perspective that the philosopher had the ethics and integrity to analyze only the issues he had thoroughly explored. For this reason, he referred issues that did not fall within his field to other, more specialized theorists, with the expectation that they would attempt to bridge their perspectives to seek a more comprehensive theory for change, but in the context that this is motivated by a unifying disposition rather than a disposition to promote individual ideas (Aalsburg & Mezirow, 2000).

Furthermore, we would add that any addition or extension of TT should be made with a high level of awareness and a deep understanding of what the American philosopher has stated regarding the components of his theory. This requires a sobriety, a deep analysis and a long-term monitoring of his work, instead of piecemeal references, in order to lead to justified criticism instead of dichotomies. This is essential to develop practices that are compatible with this particular theoretical orientation.

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