

Transformational learning and the impact on individuals, families and communities

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Background

The Fellowship Scheme was initiated in 1991 by Michael Young (Lord Young of Dartington) providing small grants to people over the age of 30 living in Devon or Cornwall wishing to change the direction of their life for the benefit of the community. There is no upper age limit and participants are known as Elmgrant Fellows. This short paper highlights the issues involved in Fellow's transformational learning.

Mezirow's elements of perspective transformation

Space does not allow for the extensive literature review utilised in the full study (Bennetts, 2003); therefore I will simply present the elements that Mezirow (1981: 7) considers present in perspective transformation. These are paraphrased as:

- 1 A disorienting dilemma
- 2 Self-examination
- 3 Critical assessment of role assumptions/sense of alienation from social expectations
- 4 Recognising that others share similar experiences
- 5 Exploring options for action
- 6 Building competence and self-confidence in new roles
- 7 Planning a course of action
- 8 Acquiring knowledge and skills for implementing plans
- 9 Provisional attempts at trying new roles
- 10 Reintegration into society based on new perspective

To what extent this inquiry into adult transitions reflects Mezirow's ten elements will be addressed within the wider discussion of findings.

Methodology

A qualitative, open questionnaire approach was deemed most appropriate for this study. This was piloted, and then all Fellows (955) were mailed; many had moved away, and subsequently 197 responded (20%). All categories are grounded in participants' data and were not pre-determined. Fellows' words are used where possible throughout this paper.

Precipitating factors for change

Fellows' responses often fitted more than one category.

- desire to fulfil potential/improve career prospects 154
- needed money to live 81
- desire to do something to benefit others 42
- post breakdown in physical or mental health 24
- returning to work after relationship split 22
- desired change 21
- returning to work after children 16
- response to enforced change 14
- redundancy 5
- boredom 3

Despite the high percentage of unemployment in the South West, few applicants were in receipt of state benefits and most expressed a desire to make some positive career change and achieve their potential.

Transformational change

All but nine Fellows reported changes in their lives since receiving a Grant and whilst it was anticipated that most Fellows would report on the effect of their personal changes, it was expected that fewer would consider their changes to be significantly life transforming. However such transformations were experienced by 156 Fellows whose responses are grouped into six categories:

- **Self-transformation**

Transformations appeared to be learning events that had a deep impact on Fellows' beliefs, attitudes, behaviours and personae. Significant learning in the case of this woman is becoming a reality as she applies it to her role as a parent.

I was incredibly inspired by the course I did. It led me to consider deeply, the way we raise our children in our culture. I believe that the careful well thought out nurturing of our children will have a direct - hopefully positive - effect on the whole community in the future. I am putting a lot of what I learnt into practice as a mother.

Others felt that action toward achieving their potential had also changed their health.

I feel fulfilled and this has contributed to my improved health. Without the life change I do believe I would not have recovered from cancer - my surgeon also believes this. Fulfillment in knowing I'm doing what I should be doing.

Education seems also to have been a way of achieving autonomy for some participants. One woman in her late forties says:

The Fellowship and subsequent study have given me the means to be an independent woman. I am now on my own with my children and am so relieved that I studied when I did and have been fortunate enough to achieve what I wanted to.

- **coping with or instigating change in self and others**

Learning to change requires developing new perspectives and one participant describes how she is using her new skills to enable others to escape their perceived limitations and instigate their own changes.

I am more confident and assertive, more committed to helping others change and enrich their lives, to be as fulfilled as possible. More able to support my children especially in terms of improving their communication skills and self-advocacy skills. I know I have helped people along - encouraging them to fulfil their potential, especially single parents and people recovering from addiction, abuse, and other traumas. I think the greatest changes - and those that I work towards most actively are helping people change unhelpful mindsets and ways of behaving - freeing them from limitations that have dominated their lives.

- **transformed relationships**

Transformations within families were reported by many Fellows: *'it rounded off my education in an holistic sense. I believe I am a better mother'*. The following quote illuminates the significance for everyone, in the breaking of old patterns.

It was the starting point for me to realise my potential in society and within my family unit. I am now employed, my children are finishing their education and gaining GCSEs at good grades... the significance is not only for me, but my children as well. It has broken the cycle of deprivation.

One man described his significant change as the way in which he now relates his work to the countryside seasons, working in harmony with the community.

Involvement with local people concerned with the countryside, and the ability to tailor my job to the benefit of the countryside and wildlife e.g. not hedge-cutting at nesting time.

- **increased educational drive**

Many Fellows reported that their significant change took the form of an increased drive to continue their learning and education.

The need to learn has become my great itch of life and without the help of the Fellowship I would never have been able to reach any of my goals...

- **career improvement**

For a number of participants the most significant change is that they now have paid employment. One woman, who received her small Grant of under £300 ten years ago, remarked that she has had the confidence *'to create one of the largest natural health practices in the South West'*. Fellows reported a wide range of transformational career changes. One participant says:

I have now been accepted to train as a vicar so I will be able to help more people.

- **improved quality of life**

Some participants reported that the quality of their lives, and in some cases their families' lives had changed since their Grant.

My quality of life has improved and I'm a better, more balanced, happier person.

Able to give my family a better quality of life.

It is never too late to improve on the quality of our existence, and for some this comes about in terms of what we can offer others, as this woman in her late sixties remarked:

As a result of this, I can now work with women in counselling, focusing on empowerment and health. It gives meaning and purpose to retirement.

The Effect of Grants

The effect of Grants on Fellows hopes, plans and ways of living came under four headings. In all, 168 Fellows responded to this question and once more participants' responses often fitted in more than one category.

- **realisation and action**

The word 'realisation' refers to the general raised awareness of Fellows in relation to living in a world of change, and that they have some power within that world to act and effect their own changes. Fellows made reference to a new way of looking at life, which was often intuitive, and action led.

I'm living my hopes and plans now.

It's about daring to follow your heart, your dreams...it helped me reach for the stars and I'm very grateful.

- **foundation for life/career**

Many participants described how they attempt to use their awareness and new learning into their everyday life, work and philosophy.

... on a day-to-day basis it makes me realise what is really important and that where I am is less significant than how I experience myself and others. On a professional basis my students benefit from my experience, I pass on learning and information freely and greatly enjoy their responses. In terms of being a parent it helps me survive my daughters' teenage years positively. I would go so far as to say I couldn't have been there for her if I hadn't embarked on this journey.

- **contributing to society**

Quite a few participants made remarks about how their awareness has affected their relationship with society in terms of how they act and think.

By taking a bicycle to work and thus reducing/eliminating CO₂ emissions. Lots of small things that are brought about by awareness.

I realised that I am a member of society in which we all have to give and take. ...I therefore see the importance of a collaborative society whereby people work out of love. It would seem there is an abundance for everyone if we learn to live right. Call it citizenship if you will, knowing one's limits/responsibilities.

- **lifelong learning**

This heading is used as a category for those Fellows who discuss both their awareness of formal learning enmeshed within their day to day lives, and the 'spin-offs' from this.

The Access course was the beginning of 7 years of study to achieve my ambition. I now understand the concept of lifelong learning and pass this on to people of all abilities, ages and gender. I hope to obtain a Master's degree sometime in the future.

Finally the words of one participant whose studies have had some family reverberations.

Was waiting for French Level III to appear on O.U. lists of courses, but may now look at what I might do with music to complete my degree. My son has a mum sitting G.C.S.E. and AS levels at the same time as him. My younger son seems to have focussed better at school in the last 18 months, maybe as a result of seeing our determination.

Themes

Certain themes were repeated throughout the study. These were faith and agency, hope and helplessness, and trust.

- **Faith and agency**

Fellows repeatedly mentioned the faith that the SCT had placed in them, how this had helped them feel that their dreams were sound, and that they were individuals with ambitions worthy of investment. They remarked that this feeling had given them self-belief and helped them to move forward with their plans. In effect they began to exercise some control over their circumstances. This sense of new found agency appeared to allow a power-shift within a changing environment, which was coupled by a sense of responsibility for self and community, and eventually an increased sense of citizenship.

The concept of identity, which appeared ill-formed at the time of application, became much clearer as Fellows began to act on their own behalf, and by the time that dreams and plans were realised, appeared more defined and autonomous within inter-dependent relationships.

- **Hope and helplessness**

Many participants were in desperate financial straits when applying for Grants. For some the SCT was a last hope in a series of disappointments and refusals. The ability to continue hoping appeared to sustain Fellows throughout their changes, and to cope with problems as they arose. This seemed to encourage action as opposed to helplessness.

Hope offers a promise of something better around the corner, and gives meaning to the struggle to go on. The search for meaning is a primary motivation in life and once life becomes meaningful it not only renders happiness, but bestows the capacity to cope with suffering or strife (Frankl 1959: 63). As Fellows' movement toward possibilities turned into actualised realities the hope did not fade, but appeared strengthened and focussed even for those who had not yet achieved their aims.

'...I had to put aside all my plans, but not my hopes. I still hope, despite my age.'

From Fellows' reports, it appears that the SCT acts as a catalyst for hope by offering the opportunity of new possibilities and new horizons.

- **Trust**

It was clear from Fellows' comments that they felt trusted and worthy of investment by the SCT Trustees. Apart from Fellows acknowledging receipt of Grants there is no other procedure for tracking how finances are used. The SCT is an example of a high trust organisation.

Yet Fellows demonstrated a clear commitment to not only honouring their commitment to their goals, but also delivering over and above their original intentions in forms which are visible within the community by actions and behaviours. Fellows noted that the trust placed in them has a validating effect on their self-image. They remarked that the faith placed in them to use the Grant appropriately enabled them to take steps to achieve their dreams. Therefore although the financial investment is important, it is not this alone that appears to enable Fellows to initiate change, but the trust and belief of the SCT that they are individuals of worth.

Discussion

According to Hudson (1999: 246) transformational learning aims at evoking a new consciousness and self-understanding, and promotes the human experience by thinking, self-expression and actions. This study supports this view to some extent whilst allowing Fellows to evaluate for themselves what they deemed transformational.

Fellows were not only responding and reacting to events imposed upon them but also were pro-actively seeking new patterns of life when they made their initial application. Bauemeister's (1994) '*cystallisation of discontent*' clearly occurs for Fellows, and Mezirow's (1981) '*disorienting dilemma*' (element 1) was also present, but this was sometimes more of 'slow burn' than a critical incident. However Fellows' readiness to accept change depended on contextually appropriate and timely opportunities which allowed for the possibilities of hope and the formulation of dreams.

Those who had experience of managing change earlier in life drew upon that to assist their changing circumstances. However self-examination and critical assessment (elements 2 and 3) appeared after each small aim toward the bigger goal had been met, rather than prior to applying to the SCT. Whilst the value of shared resources and experiences with others (element 4) was evidenced in the main study (Bennetts 2003) as helpful in contributing to the overall learning process, it was not mentioned as a factor when Fellows evaluated transformational change. Exploring options for action (element 5) took place mainly with the SCT mentor and was an initial step that occurred prior to an application being made.

Planning a course of action (element 7) also occurred, but for most this happened very early in their change process, and preceded building competence and confidence in new roles (element 6). Taylor (1997: 44) quotes Mezirow however as concluding that the 10 stages are not always sequential. Acquiring knowledge and skills for implementing plans (element 8), and provisional attempts at trying new roles (element 9) did occur. And although Fellows had never left their local settings, they did reintegrate into society (element 10) in new roles. Therefore although it can be said that this study supports Mezirow's theory in a broad sense in that the ten elements were present to varying degrees, it is not the whole story. Fellows' portrayed a series of emotional and financial highs and lows aided by supportive relationships, hard work, determination and risk-taking, coupled with an instinctive knowledge that they were on the right path.

Fellows evaluated transformational learning by the extent of major changes in thinking, feeling, acting, relating and being. Such changes led to an improved quality of life and a change in values, both for Fellows and their families. However the transformations were not just limited to ways of thinking or viewing the world, but were concerned with *meaningful action*. At the time of application 34 of the 197 Fellows were involved in some community service, but today 119 Fellows are working with their communities either in developing new projects or helping with existing schemes. These actions were often driven by intuition, strong emotions, dreams and hope, elements in keeping with Mezirow's (1991:24) 'feelings, intuition, dreams and physiological states' regarding knowing, and with Boyd and Myers (1988) view of transformative education.

The process of change in the lives of adults had many implications. In the very early stages of change, roles and relationships had to be negotiated. Learning was not taking place in isolation from the family; the whole family was learning. Learning was a family affair and in this context appeared to function as a core around which life, relationships, and role were wrapped.

These transitions were evidenced by their visibility within their lives and in the community. Fellows can be seen to have changed. They have different jobs, new friends, happier relationships, and more fulfilling lives. These transitions appear to have been sustained over the years by the knowledge that change is possible, necessary and rewarding. The transitions evolved through a cycle of evaluation of circumstances, assessment of learning need, and adaptation of present pattern of life required to achieve the new goal. In

this context lifelong learning becomes the norm, life itself; a process, not a discrete educational event. Sustainability for these individuals is not a plateau state but reflects the continued ability to learn from change. Michael Young's legacy to the people of the South West should be considered as a model for community transformations.

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