The Role of Emotions in Transformative Learning: Challenges and Boundaries for Adult Educators

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Abstract: The workshop aims to explore issues concerning the boundaries between emotional – advancing oriented adult education and psychotherapy, the risks and ‘rewards’ of dealing with the inner world of the participants, and also the education and qualities needed in order for the adult educators to be able to undertake this task.

Theoretical Perspective

Transformative learning theory was presented by Mezirow at the beginning of the ‘80s. He has defined his theory as a rational process which – through critical (self) reflection – transforms our worldview formed by our orienting assumptions and expectations (Mezirow & Associates, 1990; Mezirow, 1991).

The emancipatory potential of Mezirow’s theory has been widely recognized, although he has been criticized for being too reason-oriented and for neglecting the affective and intuitive dimensions of learning (e.g., Cranton, 2006; Illeris, 2004). Moreover, several empirical researchers have concluded that the incorporation of emotional processes into the theory and practice of transformative learning could increase its potential (e.g., Taylor’s reviews of research in 1998 and 2007). Mezirow (2009) also stated that the criticism to his theory regarding the role of emotions is justified.

On the other hand, within the last twenty-five years several alternative approaches to Mezirow’s conceptual framework have been developed (developmental approach, connected knowing, psycho-analytic view), which state that the expression and examination of emotion can transform. Among those approaches, the psychoanalytic view has wide dissemination. This approach, framed by Boyd & Myers (1988) and Boyd (1991), is grounded in Jung’s depth psychology and argues that transformative learning involves dialogue between the unconscious and the ego consciousness. Particularly, the exploration of emotions that emerge from deep within becomes a way to gain access to our internal sources of knowing, thus causing us to reconsider how we structure meaning.

Consequently, a number of questions arise: What are the common dimensions and the differences between emotional learning processes and psychotherapy? How can we create functional ways, within the setting of adult education, for educators to be able to discover participants’ emotional energies and simultaneously confront them in a non-threatening manner? What are the risks when exploring psychic dynamics? What specific awareness, skills, qualities and education are required so that adult educators can be involved in this process?

The literature review, through which we attempted to explore the role of the affective dimension of transformative learning, revealed that the correlation between the exploration of emotions that arise from the unconscious and the psychotherapeutic processes has not yet been clarified.

Mezirow considers that, even though the essential dimension of transformative learning involves critical assessment of assumptions within awareness the psychological dimension could be included in the framework of this theory (Dirkx, Mezirow & Cranton, 2006). Earlier he had stated (Mezirow, 1991) that the work of psychiatrist Roger Gould, who
attempted to adapt several approaches of psychotherapy to an educational format, added a psychological dimension to his theorizing. He also included “psychological self-concept, personality traits of types, repressed parental prohibitions that continue to dictate ways of feeling and acting in adulthood” in the habits of mind that could be transformed (Mezirow & Associates, 2000, p.17). However he claimed that it is essential to develop more insight into the process of transformative learning that takes place outside the awareness (Mezirow, 2009).

Nevertheless, we should highlight that Mezirow is particularly cautious in regard to the use of psychotherapeutic techniques in the framework of transformative learning, as well as regarding the necessary skills that adult educators who would like to work in psychological direction should have. He stated that the appropriate exploration of highly personal matters requires skills more familiar to therapists than to adult educators (Mezirow, 1990) and he underlined that adult educators are not qualified to treat psychological diseases, which require psychotherapeutic techniques (Mezirow, 1991). In the same book he also made a distinction between psychotherapy and counseling. He claimed that the former is a therapeutic relationship between patients and clients which is not included in the area of adult education. On the contrary, counseling in an educational setting is an accepted practice of adult educators, who may act as counselors or instructors to help essentially healthy learners deal with life transitions, such as returning to job market or the college, making new friends or trying out a new life-style. Moreover, he added that this kind of practice “[…] unquestionably requires psychological understanding and sensitivity” (ibid, p.205) and he suggested that “[…] graduate programs should prepare all adult educators to work with people who are encountering common problems in negotiating life transitions” (ibid.). He also suggested that adult educators need to be taught how to make distinctions between psychotherapy and counseling in educational setting.

The issue that the adult educators normally are not qualified to apply appropriately the methods connected to unconscious energies have been raised from other theorists of transformative learning as well. Kasl and Elias (2000) have noted that adult educators lack competences and comfort in fostering learning processes that are linked to depth psychology. Cranton (2006) stated that she still struggles with letting the moment be when there is anger, fear, conflict, or despair in the learning process. Kegan, when referring to the transfer of authority from the transformative educator to the learners, underlines that “[…] adult educators need help in discerning how rapidly or gradually this shift in authority should optimally take place for that student” (Kegan, 2000, p.66). In other words, he points out that adult educators need to have received special education for this purpose and they also have to be supervised by a specialist.

In addition, the extra-rational psychoanalytic discourse poses considerable challenges in reaching a mutual understanding and consensus. Cranton and Kacukaydin have showed, via literature review, that “[…] transformative learning literature lacks a discussion of the significance or relevance of Jungian theory” (Cranton & Kacukaydin, 2009, p.1), that “[…] writers and theorists have taken Jungian theory and its relevance for granted” thus “this absence of critique leaves a space to be suspicious about the extra-rational approach’s assertions, premises and propositions” (ibid, p.3). Consequently, “[…] it is an obligation for those who propose the integration of Jungian psychic structures into transformative learning to create and use a functional language in a way that their knowledge claim would be comprehensive, true, right and sincere” (ibid, p.4).

Therefore, dealing within transformative learning settings with emotions that emerge from the unconscious is a rather delicate, difficult and ambiguous process that requires the educators to possess adequate prerequisites, skills and education. Nevertheless, a number of adult educators do not seem to be fully aware of this issue. Even though sometimes their
qualifications and professional titles have no psychological dimensions, they deal with the experiences of the soul, like dreams, fantasies, myths and images that arise from participants’ interior landscape. It is obvious that this type of practice has risks for the learners, the learning environment and the educator him/herself. In order to prevent such phenomena in the educating settings it is important to give emphasis on the boundaries of the role of adult educator and the need for his/her own knowledge on psychological mechanisms.

Under this scope we would attempt to suggest three types of transformative learning educators’ profiles:

a) **Knowledge-directed adult educator**, who has a great understanding of his/her scientific field and certain awareness of group dynamics but with no relevant training and skills in this field and in the wider area of in-depth psychology. It is important that this type of adult educator stay with the learning goal and avoid opening up any unconscious processes that might harm certain learners.

b) **Knowledge-affective adult educator** with all the above qualities but additionally with a certain degree of training and skills in the psychological direction. This educator can use certain tools that open-up affective communication in the group but needs to be critically aware of the boundaries of his/her role and avoid exploring personal issues and moreover the inner self of participants as well as making interpretations and assumptions about their behavior. This type of practice goes beyond their role and level of involvement in an educational setting and brings to the surface serious ethical issues and dilemmas.

c) **Affective-knowledge adult educator**, who places more emphasis on the psychological aspects of learning and has relevant training, work, and personal experience in exploring unconscious personal and group dynamics that interfere with the learning process. This type of adult educator could work more on group dynamics and unconscious processes but he/she should also avoid interfering with personal and psychological issues of the learners, with personal trauma etc., since the learning contract and the educational setting do not allow for this to happen. However, when approached individually by the concerned trainees he/she should be able to make appropriate referrals to relevant services.

**Format of the Presentation**

The experiential workshop aims to introduce participants to the investigation of boundaries between psychotherapeutic and affective communication techniques in an educational setting. It also aims to offer them an experience of how in the context of transformative learning we can actively engage participants in a dialogue where the rational and the affective come into play and influence each other in the learning process.

The workshop is designed on the basis of the blended skills of the two trainers-facilitators, a psychologist adult educator with extensive relevant training, and work experience, in group dynamics (Anna) and a sociologist adult educator who also received training in group dynamics (Alexis). The two trainers-facilitators agreed to act as knowledge-affective adult educators on the basis of the context, the number of participants, the goals of learning, the learning contract, the lack of follow-up and our personal training, experiences and qualities. Thus our role will be in developing affective communication in the group, however with the critical awareness of Mezirow’s concerns that adult educators should not deal with psychological trauma. Emphasis will be placed on setting the boundaries of the educational setting. On the basis of the aforementioned considerations about group dynamics and professional ethics, we agreed to avoid the loop of interpreting participants’ experiences and personal issues within the group setting. Emphasis is placed on the here-and-now and the whole group dynamics.

The workshop starts with facilitators introducing the participants to the theoretical discussion concerning the role of the rational and affective processes in transformative
learning. Facilitators (Corey, 1990) are important for the group process and therefore they need: a) to be emotionally and not just physically present in the whole process, b) to be self-confident and understand that adult learners, even by their own presence, learn, c) to have the courage to recognize their own mistakes, d) to be open to accept criticism from the learners, e) to have special interest for every participant and his/her personal course of learning, f) to have a strong identity, that is to understand their role according to personal values and principles and not according to the expectations of others, g) to have faith in the group process as a means of gaining knowledge, and h) to show creativity and innovation in utilizing learners’ experiences.

At the second stage, the facilitators ask participants to identify a person in the group they would like to meet and form pairs. Facilitators can ask them to stand up and walk around the room until they find someone they would like to meet with. Facilitators may also ask participants to have some criteria in making their selection (e.g. select someone they never met before, someone of the opposite sex etc.). Participants should interview each other focusing on: a) their course of personal and educational life, and b) the reasons for participating at this workshop. Facilitators allocate 5-10 minutes for this process.

At the next (third) stage facilitators ask participants to form groups of six and introduce their pair in the new group. These small groups help in advancing self-awareness through mutual support and feedback, in creating a climate of trust and collaboration and in eliminating stress and resistance towards new ideas and insights (Tennant, 1997). Bion (2000?) also argues that these small groups help group members to form an identity and to set boundaries in their relationships with others, feel comfortable with each other, recognize each other’s contributions in the learning process and develop personal skills for managing frustration. Pairs and groups of six are used therefore in order to develop affective communication in the group.

Kurt Lewin (1948, 1951) argues that the role and the style of the facilitator (democratic vs. authoritarian vs. laissez-faire) are very significant in forming the affective climate in the group (Lewin et. al., 1939; Lewin, 1948; Lewin & Lippitt, 1938, pp.71-83). Lewin & Lippitt (1938) suggest that a democratic style promotes authenticity and friendliness in the group. On the contrary when the facilitator’s style is either authoritarian or laissez-faire then aggressiveness, anger, and frustration are the results (Reid, 1981, p.115). Therefore success towards learning goals requires that facilitators employ some important inter-personal skills that promote the development of a creative relationship with the adult learners (Douglas, 1991).

During the fourth stage, participants are exposed to a scene from a Bergman’s film (Scenes from a Marriage) that deconstructs couple relationships. We will use this great artwork as a means of encouraging rich connection working with personal emotions and assumptions. As many important scholars like Dewey (1934/1980), Adorno (1986), Greene (2000) have stated, aesthetic experience is a basic means in unearthing integrated knowing, encompassing critically reflective, affective and imaginative dimensions of learning.

At the fifth stage, the facilitators ask two of the groups to discuss the role of the husband in the film and the other two groups to discuss the role of the wife. Following this, facilitators ask groups to exchange roles. In this process we can argue that facilitators aim to explore transference. Transference is a psychoanalytic notion. Usually learners are not fully aware of the reasons for which they react in a certain way towards a person, an experience or an external event (e.g. role of men, women, couple relationships etc.) The interpretations they give are usually rational (e.g. he/she is rude, he/she listens to me etc.) but in fact their feelings have their roots and connections with significant people or experiences of the past. Therefore it is expected that interpretations of the role of wife and husband will bring to the surface through the mechanism of transference emotions, assumptions, and values relevant to
the past of every participant. The groups will assist in filtering these and suggesting new ways of thinking about old assumptions. The groups will also encourage participants to explore and exchange thoughts and feelings regarding their own experiences and perspectives of couple relationships (exchange of alternative views on assumptions – empathy – understanding the role of the other). During this stage the participants work as search groups in two levels: the rational - to reach a goal and the affective - to understand how to reach the goal better and the relevant difficulties related to group dynamics. Search groups together with entry/exit groups, consulting quarters, institutional processes thinking and periodic review were founded by Harold Bridger, Psychoanalyst and Organizational Consultant (1909-2005) and father of the “transitional approach to the management of change”. Search groups are based on Harold Bridger’s (Amado & Ambrose, 2001) notion that all groups have a task and within the context of the task we can understand conscious and unconscious processes operating between and within the group. Harold Bridger (1990) stated that in the process of transformation people experience instability that derives from within oneself and from the external environment. Search groups help to explore the unconscious feeling by focusing at the same time on a given task. The climate of respect and safety within the group boundaries allows participants to express freely their thoughts and emotions and in this way helps them to manage uncomfortable feelings that may derive during group processes by unconscious recollections of early childhood life and relationships especially within the family.

The sixth stage is to ask participants from each group of six to form groups of three persons (Harold Bridger Consultation groups) in order to discuss in a small and trusting environment a personal experience relevant to gender relationships. One of the group members, volunteers to narrate his/her personal issue, another member acts as a ‘listening ear’ and the third one as ‘observer’ of what has been said but, moreover, the feelings that are in foreplay. The aim of this stage is to give participants a chance to explore their feelings as well as the related experiences, memories and ideas. Another aim is to allow participants understand the difficulty of exploring personal experiences.

Finally, at the seventh stage, the facilitators ask groups to get back to the large group and discuss issues raised in the group settings, emotions experienced, processes, as well as how decisions were made at the group level. Then the facilitators, drawing from the aforementioned experience and participants’ contributions, discuss openly with the group issues concerning the emotional affect and the unconscious processes in transformative learning, the boundaries between emotional – advancing oriented adult education and psychotherapy, the risks and ‘rewards’ of dealing with the inner world of the participants, and also the education and qualities needed in order for the facilitators / adult educators to be able to undertake this task.

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How an Action Learning Group Experience Can Contribute to Transformative Learning

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Abstract: This innovative, experiential session seeks to present the relationship between constructs of transformative learning and action learning. Kueht (2009) suggests that action learning is a catalyst for and contributes to transformative learning outcomes. This session explores the experience of participants in the context of an action learning group.

Action Learning as an Approach to Transformative Learning

Action learning could be an effective approach to fostering transformative learning because there are similarities between the skills required of each. Action learning is expected to improve skills such as questioning, listening, and giving feedback (Inglis, 1994; Marquardt, 2004; McGill & Beaty, 1995; Revans, 1998). Action learning is reflective process. Reflection is defined as “the ability to step back and ponder one’s own experience, to abstract from it some meaning or knowledge relevant to their experiences” (Hutchings & Wutzdorff, 1988, p. 15). In action learning, participants are expected to learn how to support, collaborate with, and care about others by working with group members (Marquardt, 2004; Mumford, 1997; Revans, 1982). This may create a supportive environment in which participants can learn from each other. In turn, action learning is expected to improve participants’ interpersonal skills such as building trust with others and building relationships (Inglis, 1994; McGill & Beaty, 1995). Action learning is based on the premise that no real learning takes place unless and until action is taken (Mumford, 1995).

This session explores the experience of participants in the context of an action learning group. The focus is understanding not only the cognitive process of making the transformation, but also the other aspects of the learning experience.

Definitions of Key Terms

Action learning: Action learning is “both a process and a powerful program that involves a small group of individuals solving real problems while at the same time focusing on what they are learning and how their learning can benefit each group member and the organization as a whole” (Marquardt, 1999, p. 4). In this session, Marquardt’s (2004) framework of key components of action learning will be used:

• Problem: A problem, project, challenge, issue, or task of high importance to an individual, team and/or organization.
• Action learning sets: The group composed of four to eight individuals who handle an individual or organizational problem that has no easily identifiable solution.
• Reflective inquiry process: A process that emphasizes insightful questioning and reflection above statements and opinions. Because great questions lead to great solutions, the questioning process is emphasized.
• Taking action on the problem: The action learning group must be able to take action on the problem it is dealing with. The group members need to be given the power to act or feel sure that what they recommend will be implemented.
• Commitment to learning: Action learning places equal emphasis on the learning and development of individuals and the team, and on the solving of problems.
• Action learning coach: An individual who helps the group members to reflect both on what they are learning and how they are solving problems.