Reflective Learning in Practice: Transforming Experiences in a Graduate Global Leadership Curriculum

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Biography

Patricia Castelli is an associate professor in the College of Management at Lawrence Technological University located in Southfield, Michigan, where she teaches leadership coursework for graduate and doctorate students. Professor Castelli earned her PhD from Wayne State University in instructional technology, administrative and organizational studies, College of Education. Her major research interests include leadership development and related motivational studies.

ABSTRACT: This paper provides an insightful background of the theories that have shaped the evolution of reflective/transformative learning and presents an integrated yet simple model to

assist instructors in understanding their role (and the students' role) in promoting meaningful reflective learning experiences. Moreover, the paper provides practical and concrete teaching guidance for instructors seeking to learn the basic elements and techniques necessary for applying reflective learning in their classrooms.

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Although not practiced consistently or purposely in classroom experiences, reflective learning is not new to higher education. Previous research by Carson and Fisher (2006) uncovered that John Dewey (1933) is considered a key originator in coining this term. In 1962, Thomas Kuhn's groundbreaking *The Structure of Scientific Revolutions* described how new assumptions (paradigms/theories) require the reconstruction of prior assumptions and the reevaluation of prior facts. He further states that "when a shift takes place, a scientist's world is qualitatively transformed [and] quantitatively enriched by fundamental novelties of either fact or theory" (p. 7). Kuhn called this shift a 'scientific revolution' that sounds similar to a term used today – transformation. Through the years, significant research has expanded and formalized the process of reflective learning with related concepts such as critical reflective learning and transformative learning in the field of adult education (Schön, 1983; Brookfield, 1995; Mezirow, 1978, 1990; Mezirow & Taylor, 2009). In addition, many practitioners (Cranton, 2002, 2006; Carson and Fisher, 2006; Fisher-Yoshida, 2009; Fisher-Yoshida & Geller, 2008, 2009; have shown various ways to integrate reflective/transformative learning in their classroom experiences. And although longitudinal studies are few and far between, Taylor (2007) states that reflective learning is gaining momentum with significant increases in promoting and practicing transformative learning in higher education internationally.

The purpose of this paper is to provide an insightful background of the building blocks that have shaped the evolution of reflective/transformative learning, to present an integrated yet simple model to assist instructors in understanding their role (and the students' role) in promoting meaningful reflective learning experiences, and to provide practical and concrete teaching guidance for instructors seeking to learn the basic elements and techniques necessary for practicing reflective learning in their classrooms.

The subject matter presented was developed in several syllabi for global leadership coursework in a graduate college of management. However, once the reader gains sufficient background knowledge of the foundational theories that form the basis for reflective and transformative learning and understands the process and related techniques necessary for promoting reflective learning, instructional activities and exercises can be modified and customized to fit a variety of subjects and fields of study.

Background

Jack Mezirow introduced the concept of transformative learning to the field of adult education in 1978 and defines transformative learning as "an approach to teaching based on

promoting change, where educators challenge learners to critically question and assess the integrity of their deeply held assumptions about how they relate to the world around them" (p.xi). Although reflective learning, critical reflective learning and transformative learning are often used interchangeably, transformative learning implies change. But the fact remains that none of these methods of learning necessarily *guarantee* change.

Transformative learning is a multi-faceted learning theory. There are many foundational learning theories that influenced and shaped transformative learning. Most notable of these include elements from adult learning and instructional design, experiential learning, and the social sciences. Knowledge of these theories provides the context for understanding transformative or reflective learning.

Adult learning theory and instructional design

Although there are a multitude of definitions, Boyd (1980) defines learning by emphasizing the *person* in whom the change occurs as "the act or process by which behavioral change, knowledge, skills, and attitudes are acquired" (pp.100-101). This is a differentiating factor since there are specific aspects involved with adult learning theory that do not apply to non- adults such as life-centered, experience and self-directing. Knowles, Holton III and Swanson (2005) describe the importance of problem-solving, life-centered, personal experience and a strong need to be self-directing in the adult learning process. Knowles, et al., further state that adult learners tend to become resistant when placed in situations where they are not allowed to be self-directed. This is a critical aspect of reflective learning which is based on independent learning and personal experience.

Wlodkowski (1985, 1999) reinforces Knowles' beliefs concerning the importance of blending personal experience of the learner into the instructional design process. Wlodkowski (1999) believes that all learners possess intrinsic motivation and that the instructor's role is to bring out this motivation by using a variety of strategies aimed at deepening their innate desire to learn. According to Keller (1987), Keller and Kopp (1987), designing motivating instruction for the adult learner must include finding ways to capture the learner's attention, creating relevance, promoting confidence and producing a satisfying learning experience. Castelli (1994, 2006) suggests guidelines for enhancing interest, effort and performance in classroom instruction. These include finding motivating ways to capture the learner's interest by ensuring the instruction is designed to meet their personal needs, creating a safe learning environment by building credibility in the classroom, and finding relevant ways to challenge the learner by assigning projects and tasks designed to derive personal satisfaction from the learning experience.

Gessner (1956) states that one of the chief distinctions between conventional and adult education is to be found in the learning process itself:

> In an adult class the student's experience counts for as much as the teacher's knowledge. Both are exchangeable at par. Indeed, in some of the best adult classes it is sometimes difficult to discover who is learning most, the teacher or the students. (p. 166)

Therefore, the role of the instructor is no longer the authoritarian; rather, the instructor is viewed as coach, mentor, and guide. Fisher-Yoshida (2009) stresses the importance of coaching in the transformative learning process:

> As a coach, my purpose is to act as a guide to provide opportunities that will foster transformative learning. Typically this involves the other person's being able to see more broadly than her own point of view and to understand that her opinions are formed by her experiences and that they are loaded with assumptions and expectations that may not be shared. (p. 157)

Similarly, Castelli (2008) found that coaching and building self-esteem are the most critical aspects followers' desire from their leaders:

> A leader's ability to build followers' self-esteem is viewed as vital. Consistency should also be maintained in order to produce ongoing effort and to sustain interest. However, interest and effort may decline if the leader fails to establish trust or undermines the capabilities of the followers' worth. (p.13)

Experiential learning

Simply put, experiential learning is learning from experience. Kolb (1983), an experiential learning theorist, reasoned that people learn more from their experiences when they spend time thinking about them. Along these lines, Hughes, Ginnett and Curphy, (2009) extended this notion by developing the Action-Observation-Reflection (A-O-R) model which shows that leadership development is enhanced when the experience involves three different processes: action, observation, and reflection. Hughes et al., state:

> If a person acts but does not observe the consequences of her actions or reflect on their significance and meaning, then it makes little sense to say she has learned from an experience. Growth occurs as a result from repeated movements through all three phases rather than merely in terms of some objective dimension like time. (p.54)

The growth process referred to is called the spiral of experience. And when leaders (individuals) take the time to reflect on their actions, observe their behaviors, and reflect on how they would do things differently, they are more apt to change. Hughes, et al., go on to claim that repeated movements through the spiral of experience (A-O-R) model is the most productive way to develop as a leader (person). Cranton (2000) agrees with the spiral-like approach: "We cannot critically reflect on an assumption until we are aware of it. We cannot engage in discourse on

something we have not identified. We cannot change a habit of mind without thinking about it in some way" (p. 65).

The values and attitudes of the learner are important and play a central role in reflective learning process. Fisher-Yoshida (2009) states that:

> If we are not familiar with our core values and why we think and act the way we do, then we are destined to be reactive rather than reflexive. We would also relegate ourselves to remain in third order of consciousness and single-loop knowledge. (p.178)

Argyris (1976) describes single-loop learners as ones who do not seek feedback or constructive criticism from others particularly when it confronts their fundamental ideas or actions, and little time is spent reflecting about beliefs. Therefore, single-loop learners are destined to repeat ineffective patterns. On the other hand, double-loop learners are willing to confront their views and beliefs and encourage others to do so. Double-loop learners are most apt to reflect on their experiences and change since they are not afraid to learn and grow beyond their comfort zone.

The social sciences

The social sciences of psychology, spirituality, and sociology have also contributed to transformative learning. It is important to recognize these contributions since they mostly involve change, which is a critical component of transformative learning. The pioneering work of clinical psychologists such as Jung, Erickson, Maslow and Rogers emphasized the influence of the human consciousness, self-concept and behavior. Their groundbreaking theories (the psychology of being and the psychology of becoming, growth-oriented and self-actualization) continue to be important factors in understanding human development and learning. Carl Rogers' (1951) student-centered teaching approach to education viewed the learning process as an internal process that is controlled by the learner. Furthermore, he stated that we cannot teach another person directly; rather, we can only facilitate their learning.

Dirkx (1997) sees transformative learning as "soul work" and suggests a holistic view of self that reflects the intellectual, emotional, moral, and spiritual dimensions of our being in the world. Dirkx states that "those of us who take seriously the 'transformative' in transformative learning are interested in a kind of 'deep' learning that changes existing, taken-for-granted assumptions, notions, and meanings of what learning is about" (Dirkx, Mezirow and Cranton (2006, p. 126). Quinn (1996) states that "deep change is necessary to maintain excellence and that risk taking and learning precipitate any transformation" (p. 167). Quinn further believes that every system is continuously evolving. This evolutionary process is described by his transformational cycle. This cycle has four distinct phases: initiation, uncertainty, transformation, and rountinization. Quinn contends that the opposite of deep change is slow

death. He explained the concept of slow death to a practicing psychologist who made an interesting comment:

> At the personal level, I deal with this issue every day. Every time a client comes to me with a problem, what I find is that the person is experiencing slow death. What I try to help such persons see is that they have a choice. They can continue to experience slow death, or they make a deep change. Most do not have the courage to engage the process of deep change, and so most are not cured. The challenge is to provide them with enough encouragement, help, and support that they dare to try. (pp. 23-24)

This coincides with Brown and Posner's (2001) findings that leadership development programs and approaches need to reach leaders at personal and emotional levels, triggering critical self-reflection, and providing support throughout the change process.

Sociology and social psychology have also contributed to the knowledge of the behavioral sciences of groups and larger social systems that facilitate or inhibit learning and change. And most recently, the expansion of multi-cultural dimensions and the effects of globalization have changed the way we view the world. Likewise, to be effective, current and aspiring leaders must embrace the 'new world' by challenging their own values, beliefs and assumptions while respecting the views of others.

Transformative Learning in Practice

The instructor's role as promoter of transformative learning is equally as important as the student's performance when attempting to insure the efficacy of this approach. When incorporating reflective learning into a course or curriculum, an integrated approach is recommended and illustrated in Figure 1. An integrated model for incorporating reflective learning in adult instruction consists of five major elements: openness, purpose, meaning, challenging beliefs, and ongoing dialogue and feedback.

The instructor's role in creating openness is an essential first step. Provided that a safe learning environment and an atmosphere of trust are created by the instructor, students will be more apt to share their personal experiences. Early instructional events that contrast single-loop and double-loop learners will also be helpful by reinforcing the latter. This is particularly true when it comes to changing assumptions. Importantly, the instructor can garner trust quickly by sharing her/his personal experiences first, mistakes made and valuable life lessons learned.

The second element of purpose can best be described in terms of what is relevant to the learner. What sparks the learner's interest? And how does this learning impact the student? Notice that the emphasis is on the learner and attuning to her/his needs. Providing instructional

opportunities that relate specifically to the learner and experiences that encourage her/his personal and professional development will indeed be purposeful for the learner.

Finding meaning and significance in the learning experience requires critical and reflective thinking. New awareness causes the learner to question conflicting thoughts and assumptions. This provides meaning and is the third step in the process.

Once the learner finds meaning in a personal learning experience, the learner may find that current beliefs may not be accurate and she/he will begin to consider and search for alternative approaches and concrete ways to change behaviors. This is the fourth stage in the process. A feeling of open-mindedness and willingness to look at alternative or atypical ways of making sense of things occurs. This is commonly referred to as double-loop learning.

Creating opportunities for ongoing dialogue and feedback must be planned and intentional. To be effective, dialogue and feedback should occur one-on-one (between learner and instructor) as well as during planned group discussions and dialogue. This critical step occurs throughout the learning process with the goal of providing ongoing feedback, shared support and coaching.

Figure 1. An Integrated Model for Incorporating Reflective Learning in Adult Instruction
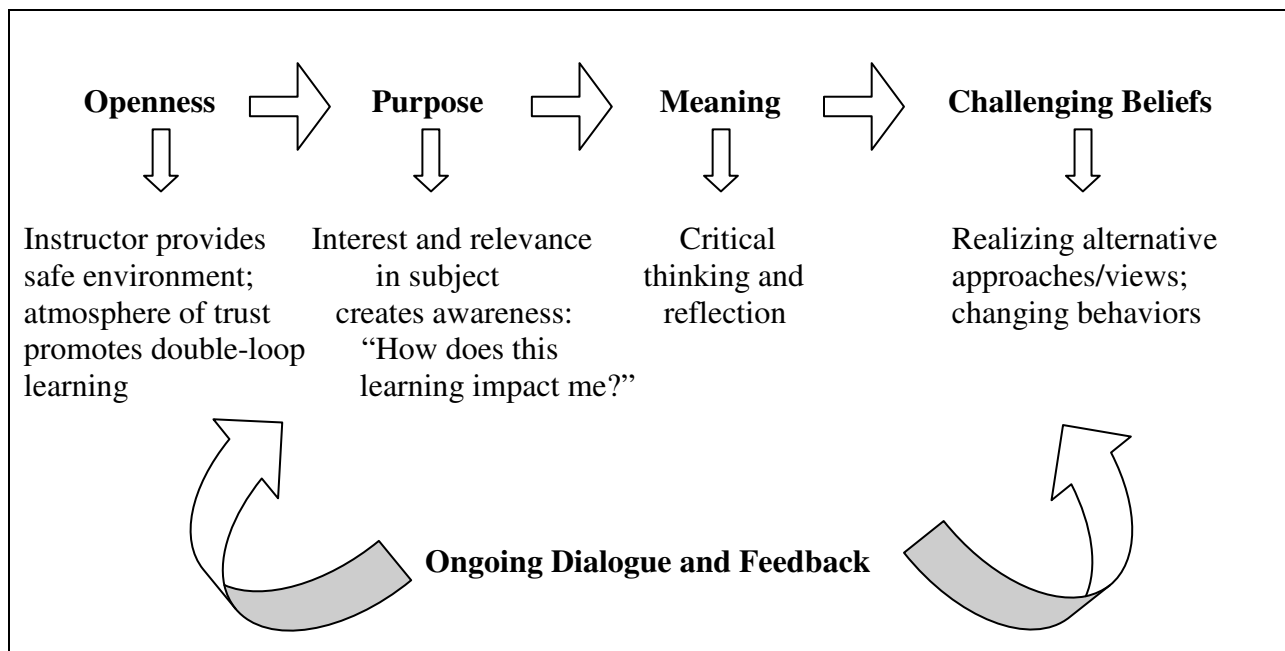
Global Leadership Applications

The following section describes the explicit strategies embedded in student projects and assignments used to support reflective/transformative learning for global leadership applications.

1. Leadership 360 Evaluation **–** A 360 Evaluation is a multi-perspective gap analysis feedback tool. Students develop a leadership assessment and distribute the survey to a wide variety of respondents (supervisor, peers, customers, vendor/suppliers and self). The outcome of the evaluation provides insight for leadership strengths and development areas. A written report that includes a development plan is created to improve performance and behaviors within an organization.

2. Leadership Interview – Students select a senior leader to interview using structured questions focused on valuable leadership experiences. These include the importance of reflection and learning from mistakes, and gathering insights and advice for developing leadership skills. Students review classmates' interviews, trends are analyzed and key learnings are discussed.

3. Transnational Leadership Development Exercises – Using Fisher-Yoshida and Geller's (2009) *Transnational Leadership Development: Preparing the Next Generation for the Borderless Business World* text, students' complete case studies, assessments and exercises designed to challenge their values, beliefs and assumptions. The book identifies five paradoxes of cross-cultural interaction (knowing, focus, communication, action and response) that teach students to view the world differently by finding new and more effective ways to communicate, and move forward in a global context while critically reflecting upon the effects of their actions. The end product is a completed workbook that assists students in understanding their strengths and development needs.

4. The Reflective Consolidation Paper and Presentation – A 'reflection' paper allows the student to find meaning in the learning experience by standing back at the end of the course to analyze and synthesize the learning experiences that have taken place both inside and outside of the classroom and to see how such learning experiences, including shared experiences and competencies of other students, translate into future actions in the workplace and in their academic program. Students discuss three insights that they found most valuable for their professional leadership development. For each item, students contrast their former beliefs with their new beliefs and explain how this new way of thinking has expanded the thoughts they now have about themselves and others. Students describe the new behaviors they are practicing for their continued leadership growth and development.

The instructor's role also played a critical part in promoting reflective/transformative learning. Strategies included the following:

1. Illustrations of previous students' work was shared and discussed with the class to provide 'real' examples of critical reflection in action. Sharing previous work also helped students understand the expectations for each deliverable.

2. Reinforcing questions were used at the end of each project and assignment by asking students to summarize their key reflections as a result of the activity. This was useful for both in class discussions and assisted students in preparing for the final exam – the Reflective Consolidation Paper.

3. Critical reflection incidents were modeled during class sessions (as well as one-on-one) when providing guidance and feedback to students. By the instructor 'going first' students felt more comfortable and open about sharing their personal experiences.

Examples of student responses

The Reflective Consolidation Paper served as the final exam. Student papers were evaluated to determine whether or not they were able to reflect upon their current values, beliefs and assumptions, and to then question the validity of them. Quotes from students' work are identified according to the order in which papers were received (Student 1, 2, 3, etc.). The following summarizes some of the highlights from their work.

The Paradox of Action (Fisher-Yoshida & Geller, 2009) was a revelation regarding preconceived assumptions and the potential pitfalls it may cause. The "On Action" and "In Action" differences were so subtle yet so obviously important skills of a good manager. The "On Action" portion of the exercise stresses the need to reflect on what has happened, as fact, and not as opinion. I learned that I need to focus on trying to understand what transpired in the past, and what the motivations of others might be, instead of reviewing what happened though my own perspective. I need to practice being a critical judge or third party to interactions between others, and myself to fully appreciate what happened. I used to believe that a good communicator was able to steer a conversation by making points and arguments to move people in one direction or another. Now, armed with this reflective knowledge, I learned that I need to become a

third party to my own interactions with others, while they happen, and evaluate the "In Action" situation. (Student 1)

I was born and raised in India, having spent my childhood in two of the largest cities in India, first in Calcutta, and then later in Bombay. My assumptions, values, beliefs and my cultural background - the personal Social Identity Map (SIM) influenced how I reacted and I had to adjust. This class has taught me to understand and appreciate better the whirlwind of emotions I felt at that time, and why I was frustrated. Now that I understand it, I know what it takes to adjust, and what to watch out for. This course has offered me a lot of insight into myself, my values, who I am, what my SIM's are and how they affect me, making me who I am. It also helped me to understand how others see me, and helped me to adjust so that they understand me better. I learned from this course that behavior can be changed, and adjusted. This course has offered me new insights into behavioral approaches, and provided me capabilities. I am confident my actions at present will greatly benefit me and others around me, and I intend to stay the course. (Student 2)

The paradox of knowing, I felt, was a very important section of the entire text and a very important aspect to address: one's self, then others. In my opinion, being a leader of any kind, at any level, first calls for that particular individual to honestly be able to distinguish who they are as a person before he or she can effectively lead a team, group or an organization. Also, within that same team, group or organization, every individual, leader or not, should be taking that same practice. This in effect builds a "knowledgeable workforce". After reading the paradox of knowing section of the Transnational Leadership text (Fisher-Yoshida & Gellar, 2009), my thoughts were that social and cultural preferences of the individuals involved help make the identity of a global workforce. The combination of all of these individual opinions and preferences culminate (hopefully) into the creation of an all-inclusive work culture, climate and structure that is conducive to all participants. This experience showed me the value of differing opinions and perspectives which has thus been a great asset in my professional and personal development. (Student 3)

What I realized from my leadership interview was that I should be doing emphatic listening, seeking first to understand. I learned that my leader was listening with his ears, eyes and heart - he was listening for feeling, for meaning. I brought this to the MBA classroom discussions and now I find myself doing a lot of emphatic listening. I also started to practice emphatic listening in my own College classroom and coached my students to remove their own pre-conceived notion of active listening and try listening with their eyes, ears and heart at the same time. Hopefully, this is a value that they will practice consistently. This course has offered me a lot of insight in the various styles of leadership and the values and competencies that a leader should have. It also afforded me the opportunity to examine my own leadership qualities, values and behaviors and "fine-tune" the ones to make me a better and effective leader. It also helped me to understand

how others see me, and helped me to adjust so that they understand me better. I learned from this course that behavior can be changed, and adjusted. This course has offered me new insights into behavioral approaches, and provided me capabilities. Having this, now I can adjust myself to the situation at hand. (Student 5)

This reflection paper is unique in that the single most important thing that I have learned in this course is to reflect. In essence, the reflection in this paper is a direct result of learning how and what to reflect upon during this course. Examples are: reflecting on myself, my values and the values of others; reflecting on my communication with others and lastly, reflecting on my actions, before, during and after them. All of these paradoxes had a great impact on me and really made me evaluate the way I have handled situations in the past and how I should approach similar situations in the future. Also, from a different perspective, I see how this new knowledge of the global workforce can help me to better understand international co-workers and improve my working relationship with them. (Student 6)

In learning about and exploring the various paradoxes presented in the Yoshida text, each one forced me to think about my behavior as a manager in a different way. My predetermined assumptions were challenged about the best way to manage employees, communicate with customers, or interact with my superiors. The exercises provided in each chapter forced me to take these challenged assumptions and revamp my philosophies to gear towards a global workforce. The most important skill that this course has taught me is how to use reflection to better myself both personally and professionally. (Student 11)

Managing a Global Workforce wasn't a required class for me but, an elective. I registered for the class thinking that I would learn further concerning how to manage the workforce and how to handle uncomfortable situations that I may encounter. Instead I was compelled to slow down and meet the (now) inner me. I was compelled to think about "what would you do?" situations. I was compelled to think about my actions first and then the employee, share with others (classmates) my thoughts, which was a biggie for me and I learned that I hold the answers to different outcomes of uncomfortable situations that I may encounter with my verbal and physical actions. (Student 12)

What I will take away from the paradox of action is more than a lesson; a reassurance that what has transpired for me personally over the last five years will definitely help me in the future as I take on my next leadership role which I hope will be of a transnational leader. I believe I will be doing a lot of reflection on what I have said or did [done] and hope to transcend more of the "being" than "doing" with my subordinates and peers. I believe that understanding the paradox of action and the key points the author makes not only will make me a more effective leader but a more wholesome individual. (Student 13)

According to Mezirow's (1978) definition of transformative learning as "an approach to teaching based on promoting change, where educators challenge learners to critically question and assess the integrity of their deeply held assumptions about how they relate to the world around them" (p.xi), it appears that the above examples show that a significant degree of learning occurred for students reflecting on their experiences in the global leadership course.

Conclusion

In order for students to question their current values, beliefs and assumptions, the instructor must create a learning environment that is safe, encouraging self-expression on the part of the student. Providing an atmosphere of trust promotes double-loop learning and openness to share experiences. The instructor must also find valuable ways to create interest and relevance in the learning experience by viewing learning from the student's perspective and by finding ways to make the instruction meaningful. This is best achieved by relating to and capitalizing on the learner's life experience from both personal and professional standpoints. Creating excitement for the learner and answering the question "how does this learning impact me?" is the best way to engage students in the learning process. Providing frequent and ongoing ways to challenge and cause the student to critically think and reflect upon their current views opens the door for a new way of thinking and behaving. Once the student understands that she/he is safe to step out of his/her comfort zone and has the support from the instructor and fellow classmates, alternative approaches and views can be realized. This new view can be reinforced by regular and open dialogue.

As Taylor states (2007), there is clearly a lack of empirical studies that test the theory of transformative learning and the corresponding change in learners' behaviors from personal/professional development perspectives. However, this does not undermine its value or the importance of promoting transformative learning in higher education. For if the goal of higher education is to cause learners to think independently, learn from their experiences and become better problem-solvers, then putting the theory to the test in terms of reflective or transformative learning is a sound practice.

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