RESEARCH ARTICLE



Assessing transformative learning in international education: Critiques and new directions based on a systematic review of literature

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Abstract

Using a bibliographic approach that employs a systematic literature review, this paper analyzes the state of the field for assessing transformative learning (TL). Assessing TL has always been challenging. Using the field of international education (IE) as a case study, this article leverages findings from the assessment of TL in IE to illustrate overall strengths and limitations of TL assessment instruments and techniques within the larger arc of TL theory. The field of IE exemplifies the challenges of TL assessment generally. This article reinforces distinctions between TL and "good learning," recommends better alignment between scholarship and the needs of institutional administrators, considers current uses and limitations of instruments grounded in cognitive approaches, and concludes with new directions possible through the inclusion of extra-rational perspectives in the assessment of TL.

INTRODUCTION

For the decades of the early development of transformative learning (TL) theory in adult education, Mezirow (1991, 2000) was the generative scholar working to illuminate what TL is and how it occurs. More recently, we find applications of TL in a number of disciplines and contexts, including higher education (for example, Iseminger et al., 2020; Ritz, 2010), teacher training (for example, King et al., 2022; Qin & Yuwei, 2015; Ye & Edwards, 2018), and international education (IE) (for example, Intollube-Chmil et, al., 2012; Stone et al., 2017;

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Wiley et al., 2021). Despite being still largely dependent on Mezirow's foundational work, this range of applications has resulted in quite a variety of operationalizations of TL theory.

In contemporary higher education, adult education, and beyond, the diversity of available quantitative instruments and qualitative techniques opens possibilities for researchers, practitioners, and learners to understand and experience TL in new ways. However, these possibilities bring with them many challenges. For example, there is the need for researchers to understand, quite deeply, the operationalizations of underlying instruments and methods, along with their strengths, limitations, and new directions. Also, ever present is a tension between theory and the practical needs of users employing specific instruments of evaluation and assessment, particularly in institutional contexts.

We focus on IE as a case study because this field has frequently turned to TL in the last decade. The field of IE is vast and highly interdisciplinary in educational research, and the research on IE is becoming a major contributor to the literature of TL. Partially this is because IE is often described as a high-impact educational practice (Kuh, 2008). While the educational context of IE differs from other contexts historically examined in TL literature, the same interest of using TL theory remains—that is, to understand the complex and deep learner change as the result of an impactful and transformative experience. By offering a systemic literature review on TL assessment in the context of IE, we not only highlight some of the most recent and innovative methods on TL assessment but also offer critiques and future directions that advance the wider field of TL assessment research.

IE literature often conflates TL with global citizenship, intercultural learning, or other constructs in IE program assessment. We can critique this conflation as an instrumentalist use of the label "transformative" to market the outcomes of educational experiences (Acheson & Dirkx, 2021) such as study abroad, virtual exchange, or globalized coursework. To be fair, we should also recognize the genuine quest of scholars in IE to adequately capture the complexity of international learning experience (Nada et al., 2018). Regardless, given the diversity of TL research approaches and perspectives in play (Hoggan, 2016; Merriam & Baumgartner, 2020), it is time to take a systematic look at how TL is (and is not) being assessed in IE in order to discuss important implications for a growing, dynamic, multi-faceted theory.

As we proceed, we will first describe our bibliographic approach to a systematic review of the IE literature that purports to assess TL, followed by a brief presentation of the results of that review. We will then turn our attention to discussing implications of this analysis, for IE but also for TL theory itself and its many applications in other disciplines and contexts. Finally, we conclude by proposing a shift of assessment into the extra-rational should allow for more complete and more full operationalizations of TL.

METHOD OF SYSTEMATIC REVIEW

The materials for this systematic review were gathered from two sources, Google Scholar and EBSCOhost. For Google Scholar, a scraping exercise was conducted using the software Publish or Perish, with three inclusion criteria: "transformative learning," "international education," and "empirical studies." The timeframe was limited to 2012–2022. This Google Scholar search yielded 605 results. A search engine was utilized in EBSCOhost with the same timeframe and criteria applied, except with "empirical study" instead of "empirical studies." EBSCOhost allowed additional filtering, so we also selected "English language only," "peer-reviewed only," and "journal articles only." The EBSCOhost search yielded 178 results. We combined search results from both platforms for the next step, exclusion. First, we excluded duplicates, yielding an article sample of 191.

The initial article searches were productive but inadvertently included articles that mentioned our key words but focused on other topics. We therefore reviewed each entry in the extracted set of literature, trimming out articles that were <u>not</u> empirical, about TL, about IE, or peer-reviewed journal articles. In total, 125 were excluded, leaving 66 articles as the final sample size for our review. We also purposefully added 14 articles that were not captured in our two searches but did in fact meet the inclusion criteria. In total, 80 articles comprise the final sample set for our systematic literature review.

We then tabulated the articles by extracting information for the following variables: (1) methodology category (quantitative, qualitative, or mixed methods); (2) specific methods (observation, reflection, or survey); (3) sample size; (4) research question or purpose; (5) research context; (6) definition of TL/connection to TL theory; and (7) findings/contributions. This tabulated information formed the basis for the findings below.

FINDINGS OF SYSTEMATIC REVIEW

What is the balance of methodologies present in this body of literature?

The majority of the 80 publications included in this review used inquiry methods categorized as qualitative (n=54), followed by quantitative (n=17), and mixed method (n=9). Further specifications for qualitative studies range from basic qualitative research, grounded theory, case study, and auto-ethnography to participatory action research. Quantitative studies utilized various levels of statistical procedures from descriptive statistics only to inferential statistics including regression analysis, analysis of variance, and structural equation modeling. Mixed methods appear to lean toward one or the other rather than balancing or integrating both qualitative and quantitative approaches.

Regarding data collection, qualitative studies used methods including interviews, blogs, narratives, observation, reflection, open-ended questions, structured dialogue, self-study notes, self-narratives, focus groups, and visual metaphor. All quantitative studies used prevalidated survey tools except for Choi et al. (2012), who designed an instrument for the study. Validated surveys were used either fully or partially to assess specific constructs such as intercultural competence and global citizenship. For mixed methods, while some used both close-ended (quantitative) and open-ended (qualitative) questions, others used interviews or participant observations as a supplemental qualitative component.

Sample size for the 17 quantitative pieces fluctuated between under a hundred to several hundred, except for an outlier of n = 25,751 (Wiley et al., 2021), which drew from secondary datasets. Since sample size is often not a key concern in qualitative research, it is unsurprising that those included in this review range from n = 1 to 150 with the majority ranging between n = 10 and n = 30. Qualitative studies with small sample sizes tended to use multiple methods for data collection (for example, Arshavskaya, 2017; Cho, 2021; Hu & Wang, 2017), including autoethnography or self-study. In contrast, qualitative studies with a larger sample size collected data using open-ended questions and coding procedures (Bell et al., 2016; Hessel, 2019). Sample sizes for mixed method research are as low as n = 6 (Jones, et al., 2016) and high as n = 221 (Fasching-Varner et al., 2018) with the majority between n = 10 and n = 50. We remind readers that larger sample size does not necessarily result in greater quantitative rigor. For instance, although Fasching-Varner et al. (2018) had a large sample size (n = 221) for mixed methods, the authors predominantly analyzed qualitative data and offered only percentage counts for the quantitative component. Similarly, a quantitative study by Choi et al. (2012) only examined percentage variation between the pre- and post-tests without inferential analyses.

In summary:

- Methodologically the research is strongly tilted toward qualitative research with quantitative and mixed methods on the rise.
- · Range of methods is wide and mediated by data collection and sample size.

How applicable are the findings beyond the studies' immediate research topics and contexts?

An overarching distinction between quantitative and qualitative studies in this review is that quantitative researchers tended to focus on documenting and quantifying evidence of change. In contrast, qualitative researchers preferred understanding phenomena or lived experiences in IE through meaning making. Mixed-method studies varied in focus. Interestingly, qualitative and mixed-method studies were heavily used in teacher education, specifically in examining how teachers from elementary to postsecondary levels perceive undergoing transformation from international learning experiences. In contrast, no quantitative studies in this review focused on teacher education.

Two major topics interrogated in the qualitative studies reviewed here are (1) international training experience for teachers as transformation (for example, Arshavskaya, 2017; Baecher & Chung, 2020; Coryell, 2013; Senyshyn & Smith, 2019), and (2) international learning experience as transformative pedagogy for students (for example, Bamber et al., 2018; Bell et al., 2016; Chang et al., 2012; Chiocca, 2021; Intolubbe-Chmil et al., 2012; Johan et al., 2019; Monaghan & Hartmann, 2014; Nada et al., 2018; Nalani et al., 2021; Ritz, 2010; Smith et al., 2014). Studies covering these two topics tend to draw from TL theory directly. In contrast, the rest of the qualitative studies reference TL literature in support of other topics such as conception of international experience (Streitwieser & Light, 2018), development of global citizenship, cultural awareness and intercultural competence (Batey & Lupi, 2012; Cheng & Yang, 2019; Fortune et al., 2022; Mason & Thier, 2018; Root & Ngampornchai, 2013a), and multicultural practices and collaboration (Uzum et al., 2019).

The topics for quantitative studies are distinguished by the measurement constructs. Different instruments are used to assess international volunteering (Lough & Mcbride, 2014), global citizenship (Mule et al., 2018), intercultural sensitivity (Lyubovnikova et al., 2015), intercultural effectiveness (Dunn-Jensen et al., 2021), intercultural development (Akdere et al., 2021), cultural awareness (Chwialkowska, 2020), global perspective (Hudson & Tomás Morgan, 2019), and environmental citizenship (Tarrant et al., 2014; Tarrant & Lyons, 2012). Notably, these studies assessed constructs related to TL, instead of TL itself. Only four studies assessed TL constructs directly in IE (Savicki & Price, 2021; Stone et al., 2017; Walters et al., 2017; Wiley et al., 2021).

Regarding context, qualitative studies examined more diverse programming in IE than quantitative research. All quantitative studies examined international programs that involve traveling mobility except for one that examined developing intercultural competence development in virtual reality (Akdere et al., 2021). While it is possible such an observation is due to the significantly larger number of qualitative studies identified, it appears exploring the transformative potential of local-based international curriculum is an emerging trend, echoing the contemporary strategy on internationalization at home (Agnew & Khan, 2014). Examples of qualitative studies examining international learning experience without traveling abroad include a curriculum development project on engaged global citizenship (Bamber et al., 2018), a living and learning community on

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international development and human rights (Brown et al., 2020), and local community-based global learning in a community kitchen (Coyer et al., 2019).

Qualitative researchers' interest in non-traditional international curriculum is likely because those emerging programs include a small number of participants, preventing large scale data collection, and innovative teaching methods, which encourage exploratory research methods. In contrast, traditional programming such as study abroad with higher enrollments are more likely to set up large scale assessments. We anticipate quantitative researchers in the future will begin to build on findings from exploratory qualitative research to examine the transformative potentials in emerging international curriculum.

In summary:

- There is little consensus in the definition offered of TL in international education;
- · Qualitative studies directly and fully apply TL theory more so than quantitative studies;
- Researchers of IE tend to use additional theories or constructs alongside TL;
- Quantitative studies privilege documentation of specific TL growth, whereas qualitative research focuses on lived experience of TL; and
- Qualitative methods are preferred in non-traditional and emerging IE curricula.

How is TL operationalized?

Operationalization is how theory is "put in action" for empirical research design with the goal of contributing to theoretical development—this might include how concepts are defined and which instruments are chosen to measure them. Studies in this review operationalized TL either directly or indirectly. Proportionally more qualitative studies directly operationalized TL theory either wholly or partially, and Mezirow's rational approach remained the predominant influence. Specifically, IE is discussed as rife with opportunities for "disorienting dilemmas" and "critical reflection" that can lead to changes in a student's "frame of reference." Only a few qualitative pieces minimally acknowledged alternative voices in TL theory, such as emotional transformation from intercultural learning in teacher education (Chiocca, 2021; Jokikokko, 2016) and social emancipatory transformation from studying abroad (Intolubbe-Chmil et al., 2012). Some qualitative studies did not integrate TL as part of the theoretical framework, rather referencing it to support the positive learning outcomes from IE, such as intercultural sensitivity and immersion (Barden & Cashwell, 2014), intercultural competence and leadership development (Lyons, Buddie, & Purcell, 2018), decolonialism and reflexivity (Castell et al., 2018), global citizenship (Cheng & Yang, 2019), and social justice (Cho, 2021).

Four quantitative articles directly operationalized TL theory (Savicki & Price, 2021; Stone et al., 2017; Walters et al., 2017; Wiley et al., 2021), meaning the theory directly informed the research design from data collection to analysis. While three out of the four drew their theoretical framework specifically from Mezirow's approach on critical reflection, Wiley et al. (2021) used Hoggan's (2016) taxonomy of TL, which incorporates approaches by other influential TL theorists such as Boyd and Freire. The remaining 13 pieces used TL theory as supplementary to describe the *extent of change* for the specific measurement constructs in study abroad programs. In other words, TL is not treated as the measurement focus per se. Instead, specific constructs measured by these studies include intercultural competence or sensitivity (Akdere et al., 2021; Dunn-Jensen et al., 2021; Iseminger et al., 2020; Lyubovnikova et al., 2015) and global or environmental citizenship (Choi et al., 2012; Hudson & Tomás Morgan, 2019; Lough & Mcbride, 2014; Mule et al., 2018; Tarrant et al., 2014; Tarrant & Lyons, 2012).

In summary:

- Most studies, regardless of methodology, operationalize TL partially in addition to other theories:
- Proportionally more qualitative studies directly and fully operationalize TL theory, although far more qualitative studies are identified and reviewed; and
- Mezirow's approach is referenced as the only TL voice for nearly all studies in this review.

What themes emerge in terms of theoretical contributions of empirical research?

Qualitative research focuses on making sense of the international learning experience, perspective change and transformation from participants' perspectives. Highlighted examples include:

- Lived international experiences of traveling abroad for a short-term for academic purposes (Baecher & Chung, 2020; Barden & Cashwell, 2014; Cheng & Yang, 2019; Coryell, 2013; Coyer et al., 2019; Dunn et al., 2014; Johan et al., 2019; Qin & Yumei, 2015; Liu, 2021; Root & Ngampornchai, 2013; Streitwieser & Light, 2018);
- Impacts of international experience on learning and participant perceptions (Asenso et al., 2013; Intolubbe-Chmil et al., 2012; Poag & Sperandio, 2015; Brown et al., 2020; Mason & Thier, 2018);
- Transformation processes and outcomes (Arshavskaya, 2017; Baecher & Chung, 2020; Chiocca, 2021; Coryell, 2013; Dunn et al., 2014; Johan, Sadler-Smith, & Tribe, 2019; Qin & Yumei, 2015; Monaghan & Hartmann, 2014; Nada et al., 2018; Vatalaro et al., 2015; Hu & Wang, 2017); and
- Specific program features that promote desired learning (Brown et al., 2020; Mason & Thier, 2018).

While all quantitative studies frame their language in support of IE, they openly communicate that changes in some areas are more salient than others. Common quantitative procedures assessing the impact of international experience are highlighted. Descriptive statistics were either reported using the survey platform's automated reporting function (Grant et al., 2021) or discerned from changes between the pre- and post-survey results (Choi et al., 2012). Regression analyses were used to assess the impact factors of program design on areas of learner development or on the extent of transformation (Lough & Mcbride, 2014; Lyubovnikova et al., 2015; Stone et al., 2017). Various group-comparison techniques, including *t*-tests, ANOVA, and MANOVA, were used to compare learning outcomes across time (Akdere et al., 2021; Dunn-Jensen et al., 2021; Tarrant & Lyons, 2012), student groups (Savicki & Price, 2021), and topics (Tarrant et al., 2014). Structural equation modeling was used to identify the factors that maximize the potential of TL (Chwialkowska, 2020) or to test the relationship between features of a global learning program and student development in desired areas (Hudson & Tomás Morgan, 2019; Mule et al., 2018).

- In summary:
- Quantitative and qualitative research tend to ask different research questions, interrogating TL from different angles; and
- While there is some overlap, quantitative studies focus more on the impact of IE, and qualitative studies explore how participants make sense of international experiences.

CRITIQUES OF THE LITERATURE

When everything becomes transformative learning

TL theory provides powerful descriptions of the learning processes and learner development paths that seem to be perceived as highly relevant to scholars and practitioners in the field of IE. For this reason, IE educators frequently borrow TL terminology such as "transformative learning," "transformational learning," and "learner transformation" without necessarily drawing on accompanying theory. Literature on IE is no exception. It appears TL has become an umbrella term for a spectrum of learning outcomes examined in IE research. Those outcomes are often pinpointed to specific assessment constructs, from intercultural competence, intercultural sensitivity, global citizenship to global mind-set. The general argument is the world needs a workforce that is globally minded and interculturally competent, and IE has the potential to "transform" students into workers with these characteristics.

While it is tempting to use TL theory to explain powerful learner development in IE, excessive and superficial usage of TL undermines its theoretical integrity—that is, TL theory has been used to describe nearly all types of learning in IE, and if TL is used for everything, it becomes nothing (https://itlc2022.intertla.org/conference-theme/). From the standpoint of assessment research, specifying assessment focus is key; being all-inclusive or vague is the opposite of effective assessment. Unfortunately, the latter appears to be the current landscape for assessment research in IE citing TL theory. It is not our intention to debate whether or not student learning in IE can be labeled transformative. In fact, the positive momentum of more scholars applying TL theory for IE is a commendable direction that advances the field. However, we do want to critique the all-inclusive or vague usage of TL theory. The field needs to ask itself: What exactly is TL in IE?

Our critique highlights that TL in IE is predominantly limited to learning *outcomes*. While outcomes are an important aspect of TL, the theory historically pays parallel attention to processes, and recently receptiveness (Cox, 2017). Our systematic review informs us that scholars habitually associate constrained TL assessment with learning outcomes (in the case of IE, intercultural competence, global citizenship, and so on). Instead of conceptualizing TL as outcomes only, we suggest based on the fullness of TL theory that TL should be more appropriately referred to as the extent or magnitude of change. While the extent of TL can be discerned from outcomes - for instance pre- and post-test scores comparison - processes and receptiveness offer additional and different angles to assessing TL. Put differently, while outcomes are essential for assessing TL, more nuanced understanding about the phenomenon of transformation can be gained by conceptualizing and assessing receptiveness and process. However, the potential challenge is quantifying change as processes and receptiveness is more difficult than it is for outcomes. We attribute this as the reason why there are substantially more qualitative studies assessing TL in IE, because they tend to offer richer descriptions about the processes and receptiveness of TL, for example by illuminating how participants make meaning of their IE experiences.

RESPONDING TO REAL-WORLD IE NEEDS WITH TL THEORY

Another issue our systematic review revealed is a misalignment between educators at the individual level who are employing TL to design and assess IE learning experiences (for example, in a single cohort of a globalized course or study abroad program) and administrators at the institutional level who are looking for evidence of TL on a larger scale

and/or over a longer period of time (for example, in all undergraduate engineering students over an entire 4-year program of study). In higher education, variations of the term "transformative learning" have become buzzwords among administrators under pressure from accrediting bodies and their branding campaigns to document learner change over time. The documentation of change they seek is most often cognitive (less commonly, behavioral, and rarely affective) and tends to privilege career preparation over person/citizen development — emphases that do not necessarily align well with the body of TL theory. Yet, administrators are likely unaware of their misappropriation because they are not well-informed about the decades of TL literature, as scholars tend to be. Scholars in turn exhibit their own deficiency of awareness, in that they do not appear responsive to institutional needs in their research agendas. While researchers in our review evince a clear preference for small sample sizes and qualitative methods, administrators lean towards a big data approach. The result is that most existing models of TL assessment are not well poised to meet the needs of high-status stakeholders in IE. As a cautionary tale, we can consider Larry Martin's (2003) critique of adult literacy scholars and policy makers for their lack of connectedness: Building top-down educational initiatives without a firm foundation of research yields curricula and programming that are ineffectual at best and counter-productive at worst. If the gap between scholars and administrators in IE cannot be bridged, TL theory will become irrelevant and educators will move on to the next buzzword; meanwhile, the failings of everything constructed in the name of but not in the true spirit of TL could come to tarnish the theory itself.

As a well-developed theory, TL can provide considerable insights into learning in IE; however, a robust and sustainable application of TL in the IE sector will require better communication (and some adaptation) between the currently misaligned stakeholder groups of researchers and administrators. We would like to offer some recommendations. Scholars are responsible for helping policy makers and institutional administrators see the value of expanding the focus of TL beyond outcomes. TL scholarship therefore needs more accessible entry points. The traditional literature, written for a scholarly audience rather than practitioners, can be dense in style and conceptually confusing. If TL scholars want high level educational decision-makers to understand and employ the theory as a whole, and not just its terms, they need to be able to communicate clearly and succinctly to external audiences. Furthermore, TL scholars in IE need to find a better balance between their desires to more deeply understand the processes and contexts of TL through qualitative approaches and the needs of administrators to document institutional effectiveness with evidence of student growth via quantitative means. More scalable methods that are simple enough to be deployed by administrators and cost-effective with large numbers of learners must be developed, validated, and disseminated. Given the concerns of policy makers, the capacity for longitudinal analyses and the means to compare data across institutions are key instrument features in this effort to create more and better TL measures.

INSTRUMENT OPERATIONALIZATION FRAMES UNDERSTANDING

Any model of reality, such as a psychometric instrument, is necessarily a simplification of what it seeks to measure. TL's growing instrument canon offers opportunities for researchers and practitioners to assess, understand, and restructure learning environments; however, researchers and practitioners should temper their use of assessment tools with an understanding that each instrument is an incomplete operationalization of a vast theory. Contemporary instruments have become a component of TL's growing edge. As a part of this growing edge, each instrument should be continually modified and potentially replaced by new scales and measures yet to be designed.

TABLE 1 Contemporary, quantitative instruments in TL

Meta direction

There are opportunities to cross validate instruments, assessing commonalities and differences to improve existing scales and inform new instruments, especially in extra-rational domains

Instrument	Operationalization	New Directions
Customized BEVI (Wiley et al., 2021; based on Shealy, 2016)	Psychology research, later mapped to TL metatheory (Hoggan, 2016)	Continued expansion of BEVI scales into TL literature to strengthen metatheory
TROPOS (Cox, 2017 & 2021)	Critical reflection with supporting processes	Utilize to construct new, exploratory subscales; full instrument published for use and modification
TLES (Walker, 2018)	Critical reflection with supporting processes	Integrate with new subscales beyond critical reflection
TLS (Stuckey et al., 2013, 2022)	Conceptualized as comprehensive, from rational through extra-rational	Utilize subscales in new, composite instruments

Instruments are inherently derivations of a source theory. A theory's operationalization allows for empirical hypothesis testing, theory development, and deep analysis. This deep analysis will approach, but will necessarily fall short of, the deeper depths of the foundational theory. Further, a deeper theory itself can only approach, but will fall short of, the deepest depths of experience, consciousness, and subconsciousness. Researchers and practitioners should use TL instruments with care for how instrument construction, validation, and critique can refine the source theory, lest a particular instrument become a static and dominant mode of assessment that eclipses its foundational theory. Within IE, thoughtfully chosen TL instruments support the alignment of assessed concepts with TL theory, ensuring IE researchers are measuring TL as opposed to an alternative concept labeled as TL.

Table 1 classifies four contemporary quantitative TL operationalizations, revealing a general emphasis on critical reflection driven processes with some efforts to expand into new frontiers and perspectives, such as extra-rationality. Each instrument's operationalization focuses on a necessarily restricted perspective on TL. Each at once emerges from and then informs contemporary TL development. A diversity of unique operationalizations indicates a growing, diverse, and broad theory of TL, which is highlighted in Hoggan's (2016) description of TL as a metatheory.

In Table 1, extra-rational approaches represent a frontier for operationalization, to continue theory refinement and better align TL theory with TL instruments. As an intermediate step, researchers could pilot composite surveys utilizing subscales from the suite of existing instruments or develop new items to deploy alongside an existing instrument. In addition to assessing TL outcomes and supporting TL processes, a third dimension of TL *receptiveness* — exemplified in the TROPOS subscale of *attitude toward uncertainty* (Cox, 2017) — may help to unify TL instruments, theory, and observations. Also, researchers could compare TL-specific instruments in Table 1 with instruments developed in other domains to further discern convergent and divergent validity with TL, such as the Global Perspective Inventory (Braskamp et al., 2009). Further, seeking inverse measures to TL would further clarify what TL is and is not. This expansion would also align instruments with the foundational concept in TL that learner choice is central to forming a more open, discerning, and positive worldview. Finally, we must not forget that, leveraged appropriately as formative assessments, TL instruments do more than document learning. Indeed, as reflective tools and goal-setting aids they can act as a catalyst for learning. That is, instruments

assessing TL within a learning environment can encourage new dimensions of TL throughout a learning experience.

NEW DIRECTIONS

As the scope of contemporary TL assessment has grown, study findings have provided an increasingly sophisticated quantitative perspective on TL's complex dynamics. New approaches can encourage dialogue among researchers utilizing qualitative, quantitative, and mixed methods as the trajectory of TL theory development leads to new challenges, such as responding to the growing impetus to apply a TL lens in IE.

Existing instruments, particularly TROPOS (Cox, 2017, 2021) and TLES (Walker, 2018), provide a well-defined and validated path toward assessing TL from a critical reflection-centered perspective. Both operationalizations account for somewhere around half the variance observed in their respective field and subsequent replication studies, suggesting a need for contemporary TL researchers to more rigorously explore extra-rational operationalizations. Recent efforts expanding beyond the cognitive/rational frontier of TL operationalization have been led by Acheson et al. (2022) and Wiley et al. (2021), who attempted to operationalize the TL typology outcomes highlighted by Hoggan (2016) using the scales from a validated instrument from the field of developmental psychology, the Beliefs, Events, and Values Inventory, or BEVI (Shealy, 2016). While further empirical support is needed for this approach, the scholars are pioneering an operationalization of TL assessment that attends to both the rational and extra-rational.

Nearly all studies analyzed in this review approach TL as cognitive, rational, or critical by concentrating exclusively on the Mezirowan perspective. While perhaps not surprising in an educational system that reflects a Cartesian preference for cognition, this cognitive-only focus is precisely why Newman (2012) critiqued TL theory for offering explanations that can simply be rephrased as "good learning," in that all good learning should expand students' cognition. While there are exceptions in this set of literature from IE that mention other theoretical aspects of TL, such as emotional transformation (Chiocca, 2021; Jokikokko, 2016) and social-emancipatory transformation (Intolubbe-Chmil et al., 2012), the number is small and the depth of reference shallow. We suggest that researchers interested in using TL theory for IE expand their awareness of TL scholarship beyond Mezirow. In fact, the strength of TL theory as distinct from "good learning" is the multidimensionality and interconnectedness of deep changes to structures of the self at and beyond the cognitive dimension.

Interestingly, in articulating his theory of perspective transformation, Mezirow (1991) foreshadowed contemporary quantitative assessment's current frontier, stating:

Evaluation of gains as a result of transformative learning should attempt to map the learner's initial meaning perspective and compare it with his or her later meaning perspective. Differences analyzed should include changes in interests, goals, awareness of problems, awareness of context, critical reflectivity and action, openness to alternative perspectives, ability to participate freely and fully in rational discourse, and willingness to accept consensual validation as a mode of problem solving in communicative learning. (p. 226)

Retrospectively, this statement appears to form half the scope of TL operationalization, equally important to the remaining half to be defined. As for new directions through operationalizing extra-rationality, qualitative and quantitative researchers should take their cue from John Dirkx (2012) in dialoguing about the next permutation of instruments:

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Jungian and post-Jungian theory, through its emphasis on the symbolic and the imaginal, is well-suited to help educators and learners understand more deeply the symbolic meanings associated with many of the actions, processes, and structures that evolve in our learning settings. The imaginal is not intended to take the place of more analytic, reflective, and rational processes that have been associated with transformative learning. Rather, it is intended to provide a more holistic and integrated way of framing the meaning-making that occurs in contemporary contexts for adult learning. (p. 127)

While TL emerged in a context of rationality and is increasingly used to assess learning in cognitive-centric environments, TL assessment results illuminate how further, extra-rational dimensions of adult learning would bring fullness to both TL theory and application, including intentionally shaping contexts for learner experiences and documenting growth over time.

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APPENDIX: ADDITIONAL ARTICLES INCLUDED IN SYSTEMATIC REVIEW OF LITERATURE

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