

Transformative Learning: Sojourners' Experiences in Intercultural Adjustment

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Abstract

This research examined the nature of changes in meaning structures among sojourners through the framework of intercultural adjustment. A qualitative research design was employed. Twenty-five international graduate students from East Asia were selected through a purposeful sampling procedure. Semi-structured interviews were conducted and the constant comparative approach was employed for data analysis.

The major findings indicated that the sojourners experienced transformative learning through intercultural adjustment. The nature of changes in meaning structures provided more diverse perspective in the transformative learning theory. This study also found the significant role of subjective factors that brought perspective transformation. The role of social relationship including modeling and friendship was a significant factor.

Both assimilative and transformative learning resulted in the building of a new self-image among the sojourners characterized by openness, self-confidence, changed values, and new ways of thinking and life.

Through the framework of intercultural adjustment, this study revealed more integrated perspectives on the nature of transformative learning theory. The transformative learning theory was enlarged and validated by acknowledging the significant role of social and cultural context and subjective factors.

Key words : *Transformative learning, Adult learning, Intercultural adjustment*

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Introduction

Transformative learning theory has stimulated much research in various fields. The theory has been applied mainly in the Western context, and its nature is characterized as rational, cognitive, analytic(Grabove, 1997), and individual-directed(Connelly, 1996). The main components that facilitate transformative learning are critical reflection and rational discourse.

The empirical studies, however, related to transformative learning show that subjective factors including intuition, emotion, and relationship can also stimulate perspective transformation(Taylor, 1997). Because the theory is applied mainly to Westerners, the necessity of study within the non-Western context is required for the theory's holistic understanding and development.

A current literature reveals a similarity between the intercultural adjustment and transformative learning. Taylor insists that intercultural adjustment is transformational, emphasizing the process of becoming competent in a host culture. Intercultural adjustment is a learning process, especially transformational (Taylor, 1994b). Kim & Ruben(1988) also regard the transformation in intercultural adjustment as learning/growth process.

Although the literature of intercultural adjustment views that learning takes place in a new culture, there have been few studies on how people actually learn; how learning actually takes place in a new culture is not well investigated(Taylor, 1994a; Jacobson, 1996). Thus, there should be a systematic study of how learning takes place in a new culture. This is a significant issue especially given the fact that there is a lack of empirical studies linking transformative learning and intercultural adjustment.

The study of intercultural adjustment as a learning approach needs more research because it may explain how individuals change their meaning structures

in a new culture, in ways similar to transformative learning.

The sojourners from East Asia have a high context culture where social relationships are strong. Their cultural heritage is generally different from that of the West. Rationalism, individualism, a monochronic concept of time, linear, and logical thinking are main characteristics of Western culture. In the Eastern culture, collectivism, a polychronic concept of time, intuition, and emotion are prevalent (Hall, 1981).

Therefore, the study of intercultural adjustment of sojourners from the East Asia related to transformative learning is significant because they have lived in a different culture where intuition, emotion, and collectivism are prevalent. Because current empirical studies reveal the importance of subjective factors in transformative learning, the study of sojourners intercultural adjustment will offer valuable insight.

The purpose of this study was to examine the nature of changes in meaning structures among sojourners and to determine what factors were described as initiative and facilitative of this process as they adjusted to a new culture. This research sought to integrate the study of intercultural adjustment and transformative learning to contribute to the development of a more integrated theory of transformative learning.

Literature Review

Since 1978, the theory of transformative learning has been evolved into one of the main streams of adult learning (Taylor, 1997). Transformative learning theory refers to "effecting transformations in frame of reference within the scope of one's awareness through critical reflection on assumptions" (Mezirow, 1998). The theory focuses on how individuals construe their meaning from

experiences. Meaning making is the foundation of transformative learning. Transformative learning focuses on making meaning and how it is acquired, challenged, validated, reformulated or transformed. Mezirow contends that adults live with their meaning systems (meaning schemes and perspectives) that function as a lens to view the world. However, what they acquired through socialization, acculturation or schooling are distorted and out dated that need to be challenged and reformulated (Mezirow, 1991). Thus, the foundation of transformative learning is emancipatory approach (Cranton, 1994). Emancipatory learning takes place through critical self-reflection on assumptions. According to Mezirow, content and process reflection can lead meaning scheme changes while premise reflection brings meaning perspective shifts (Mezirow, 1991).

Mezirow's transformative learning theory has been criticized for lack of social concern (Tennant, 1993) and ambiguous role of context in learning process (Clark & Wilson, 1991). One of main concerns of his theory has been its too much focus on cognitive, rational and individual centered (Taylor, 1997). Another issue of the theory is that it has exclusively developed and applied with western population (Wiessner & Mezirow, 2000).

Objectives

The goal of this study was to examine how sojourners make sense in a new cultural context in the United States. How they make meaning from a new culture related to learning process was the main purpose of this study.

Methodology

A qualitative research design was employed to examine how sojourners

change their perspectives in a new culture. Characteristic of a qualitative study is to comprehend the phenomenon of interest from the participants' perspectives, not the researchers. This is sometimes referred to as the *emic*, or insiders' perspective (Merriam, 1998).

Sampling and Data Collection

The population for this study was international graduate students from East Asia attending at three Christian higher learning institutions in the Midwestern United States.

Main reason to choose sojourners from East Asia was cultural difference characterized by collectivism. Selection of sample was done with purposeful sampling. The criteria to select sample was from East Asia, age between 24-40, and two more years study experience in the States.

The final participants consist of 25 sojourners: 12 male and 13 female. Representative countries are Mainland China(5), Korea(9), Japan(5), Hong Kong(4), and Taiwan(2). The participants were on average of 33.56 years old. On average length of stay in America was 4.34 years.

Research Procedure

An interview in a semi-structured format lasting 50 to 90 minutes was conducted with each of twenty-five participants. The interviews were audio-taped. After each interview, the data were transcribed on a daily basis, and coded and re-coded with the constant comparative method until relevant themes began to emerge.

Findings

Perspective Changes in Cognitive, Affective and Behavioral Area

Most students reported taking new perspectives in a new culture. Gina from Korea said, "I have changed my assumption of American friendship as it has positive side too." Jin from China shared that he took new perspective on China and America as a result of cultural conflict between his and America.

Affective changes in perspective were due to a freedom they can enjoy in the States. Unlike their mother culture characterized as community focused life, high social expectation or lack of personal privacy, the students felt comfortable in America. Ping said, "Since I came here, I feel more comfortable because I can have more privacy." Tammy said that she felt comfortable because people do not care about others. Another characteristic of affective shift was value change. In the States, the students tended to value their family and country more. Ji Eun experienced that America is more family oriented society by which she changed her perspective. She reported, "I think that family is really essential, and I realized how much they [my family] have loved me. I regret that I have not fully responded to family love."

In behavioral change, the sojourners lived with new life style characterized as becoming more active and expressive. Main reason was individualism that individuals should take initiative and be expressive their voices. Esther said, "I had become more expressive because this culture requires me to do so." Influenced by American academic, the students also developed critical thinking skills. Hirouki said, "In the States, studying method is different; I should be more a critical thinker."

Personal and Socio-cultural Factors

Subjective factors such as modeling and friendship played a key role to bring perspective changes. Through modeling, the students changed their perspectives because the American role models showed more integrated Christian life. Jean said, "American Christians show more integrity. Their way of life shows consistency whether they are inside of church or outside." Yoko through modeling shared how it affected her to change. She said, "I was looking at their life, their personality and way of living and I was thinking how I could make it like them or close to them."

Friendship influenced the sojourners to change their ways of thinking through support, caring, and fellowship. Hiro had close friendship with American friend who taught him English in encouragement. Hiro said, "He taught me English and encouraged me. So I gradually gained more confidence of speaking English with others." Song Hee took a new perspective as she received support and care when she was in big crisis. She said, "She came to me and helped me a lot that changed me. I like to offer myself to walk with others [those in need] and I have several people like that."

American individualism influenced the student much because of big cultural difference. Unlike their mother culture, the sojourners were expected to focus on their self which helped them discover their self-identity. Because of group identity in their mother culture, the students have not fully paid attention to their self. Integrating into American culture, they began to focus on their life. Esther said, "My life was much repressed [in Korea], but now I became more self-confident because I was able to express myself freely in America." Tammy became more autonomous because she had to be independent in the States. She said, "In here, every time you and I have to go to make a copy. Nobody

expects that. In Korea, if we make a copy, we will collect for a whole class and make copies 10 or 20 at same time.”

Academic structure was the most significant factor that brought perspective changes. The students experienced that they are valued as a unique individual in horizontal relationship. They are also required to actively engage in class activity; they received encouragement from professors that they have not often experienced in their mother culture. Lilly said, “[American education] encourages people to be expressive. Because of education that I am receiving for past several years, I became more self-confident.” Adjusting to American educational context, the students seem to feel a self-confident that elevated their self-esteem because it made them feel better, bolder, comfortable or even empowered. Domo reported that she was encouraged to raise questions, receiving compliments from professors, which made her bolder and feel self-confident.

Transformative Learning through Catalytic Experience

Disorienting dilemmas were initiated and facilitated by unpleasant experiences, cultural disequilibrium and personal crisis. Unpleasant experiences as a minority served as triggering events because the students seemed not to expect these experiences, nor to have encountered them before. Esther explained, “In a class, there was a group work and discussion. However, American students did not include me. They just talked themselves.” Asai perceived exclusion in his American church. He said, “I felt segregation [in my church]. Very few people addressed me and talked to me to know about me. It was a kind of disappointment so that is first experience to realize segregation.”

The Role of Emotions

Strong emotional distress prompted critical reflection of assumption. Esther questioned and doubted the American students who excluded her in a class. She engaged in critical reflection, thinking how they could exclude her in a class, given the fact that they were all Christians. When Soo Young had unpleasant experience with her American roommate, she began to think and question on her assumption on American missionary. She reported, "She said with angry tone, when are you going to bed? It hurt me. So I was thinking wow! A missionary and she is ten years older than me. Why?"

Critical reflection was aided by strong emotional reaction. Critical reflection following emotional reaction brought perspective transformation. Non-emotional reaction mainly brought assimilative learning involving little reflection. Several students handled their dilemmas through taking immediate action or thoughtful action.

Intercultural adjustment brought both assimilative and transformative learning among the sojourners. While adjusting in the States, the students built a new self-image characterized as open perspective, self-confident, value change, and they found self-identity with new ways of thinking and life. The process of both assimilative and transformative learning is displayed in figure 1.

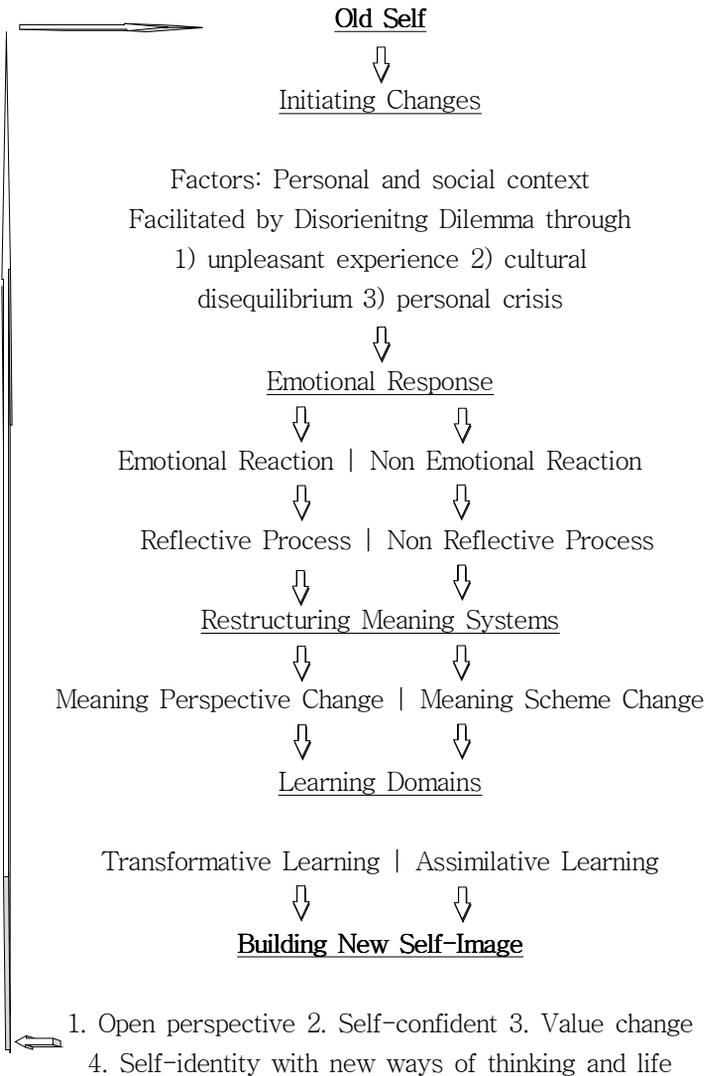


Figure 1. The Learning Process in Intercultural Adjustment (adopted and modified from Taylor 1993 and Mezirow 1998)

Discussion

The study of intercultural adjustment among the sojourners from East Asia revealed various insights to the understanding of the nature of learning process related to transformative learning theory.

Integrated Understanding of Transformative Learning

The nature of perspective transformation among sojourners is more than a rational and individual aspect of change. Song Hee became empathic toward others as she went through severe personal suffering. Gina took sympathy toward other minorities, as she was a minority in the States.

The outcome of perspective transformation also includes spiritual dimension. Song Hee became more mature in her faith as she realized what God wants her to do through suffering. Esther reported strengthening faith as she had hardships and more personal reflection time with God.

Subjective Aspect of Transformative Learning

One of the main criticisms of Mezirow is his over reliance on critical reflection as a main mechanism to lead perspective transformation (Taylor, 1998). Mezirow writes,

“By far the most significant learning experiences in adulthood involves critical self-reflection reassessing the way we have posed problems and reassessing our own orientation to perceiving, knowing, believing, feeling, and acting (Mezirow 1990).”

The sojourners from East Asia did not just engage in critical self-reflection of assumptions as they faced disorienting dilemmas. Rather than critical reflection, strong emotional reaction serving as “a driving engine” prompted the students to engage in reflection. There have been few studies reporting the role of emotion in transformative learning. Gehrels' study indicated “feelings to be the trigger for reflection”(Gehrels, 1984). Morgan(1987), Sveinunggaard(1993), and Coffman(1989) revealed, “critical reflection can begin only once emotions have been validated and worked through”(Taylor, 1998). This is a significant finding, as Mezirow did not adequately address the role of emotion in his theory. Taylor writes,

“The recognition of the emotive nature of a disorienting dilemma is inadequately addressed in Mezirow's model, who sees "emotion [simply] as interpretations of feelings" (p.13), while perspective transformation as a learning process gives undue emphasis to rationality, logical thought, critical analysis, and planned action(Taylor, 1994).”

Mezirow seems to focus exclusively on individual's inner reasoning process when they face disorienting dilemmas. When individuals experience cognitive dissonance, they rely on their cognitive aspect of problem solving in transformative learning. Thus, in his ten phases of perspective transformation, Mezirow seems to focus exclusively on cognition, giving little attention to the role of affect.

In this study, critical reflection was initiated and facilitated when the students experienced intense emotional reaction. Critical reflection is aided by the reaction of emotions, especially severe ones such as shock, pain, grief or angers. What this finding offers was that critical reflection and emotion seem

to work together. Given the fact that in East Asia the use of emotion is prevalent, this finding seems to indicate that emotion is a significant factor in the students' perspective changes. This finding was supported as Taylor argued the necessity of co-work between reflection and emotion. He states,

“In essence, critical reflection and feelings should be no longer be viewed as separate, but instead as operating in an interdependent relationship, with each relying upon the other in the search for clarity and understanding(Taylor, 1997).”

Thus, affective dimension of learning played a key role in changing the sojourners' perspectives. The main reason was the co-work between emotion and cognition. Taylor argues that emotion initiates individuals to engage in their reflection. He said, “It is our very emotions and feelings that not only provide the impetus for us to critically reflect, but often provide the gist of which to reflect deeply”(Taylor, 2000). When the students had a disorienting dilemma as a minority, they felt emotional distress, as they never expected it before. Such unexpected experiences seemed to force them to engage in critical reflection, thinking why it happened and how to solve it. Negative feelings facilitated the students to validate, challenge, reformulate or transform their assumptions.

Significance of Social Relationship

Many students changed their meaning structures through modeling and friendship that involves in more social relationship. Through modeling the sojourners seemed to assimilate the role models into their lives, not involving much reflection.

This study indicates that transformative learning is not just self-directed as Mezirow views. Although individuals engaged in reflection as they experienced cognitive dissonance between their assumptions and reality, the way they handled their problems seems to require a more relational dimension. When the students had disorienting dilemmas, they sought to cope with their problems through relationship, not just through personal reflection. This finding supported Merriam's study of how HIV-positive adults make sense of their lives. They found the significant role of supportive groups in transformative learning. They stated, "Supportive groups are important in facilitating the transformative process"(Merriam, Courtenay, & Reeves, 1998). Taylor argues that although Mezirow mentions the role of relationship in transformative learning, his view is still limited. Taylor writes,

"Relationships are referred to indirectly by Mezirow(1995), most often in the context of rational discourse and the final phases of a perspective transformation. He identifies basic operating assumptions and ideal conditions for objective and rational discourse to maximize understanding between participants. However, he has tended to overlook the more subjective elements of relationships(trust, friendship, support) and their impact on transformative learning(Taylor, 1997)."

Taylor stated that relationship through trust, support, or friendship was frequently found in the review of Mezirow's transformative learning(Taylor, 1997).

Both transformative and assimilative learning showed the important role of social relationship in reshaping the sojourners' perspective. This finding also supported Robertson's emphasis on the role of relationship in facilitating

transformative learning(1996). He said, "Furthermore, transformative learning is best facilitated within an educational helping relationship"(Robertson, 1996). Transformative learning theory is individual centered, however, relationship played an important role in perspective transformation among the sojourners. Thus, the subjective aspect of relationship should be significantly considered in transformative learning theory.

The Significant Role of Context

The role of social and cultural context was also significant in bringing perspective changes. The new cultural context greatly influenced the sojourners to restructure their meaning systems. However, Mezirow's transformative learning has not fully paid attention to the role of social context. Taylor states, "context and culture, have been only marginally looked at in how they influence transformative learning"(Taylor, 2000).

Self-centered American individualism prompted the students to discover their self-identity. The academic structure also made them feel self-confident because of its nature that is learner encouragement, value of learners idea, dynamic class participation with their voices, etc. Both the discovery of self-identity and becoming self-confident elevated their sense of self-image(worth). Mezirow has been criticized for not clearly exploring the role of context in transformative learning. Although Mezirow acknowledges the role of context in learning, Clark & Wilson state(1991), he fails to discuss how exactly the context influences the learning process. They write,

"What he fails to do, however, is maintain the essential link between the meaning of experience and the context in which it arises and by which it is

interpreted. Further, Mezirow fails to explicate exactly what role context plays in this learning process; instead he implies that this learning conforms to universal principles that apply across all contexts.(Clark & Wilson, 1991).”

This study demonstrated that social and cultural context were significant elements that restructured the students' ways of thinking and life. Academic and social context strongly impacted the sojourners to boost their self-esteem. This finding was consistent with Clark's study on the impact of context in transformative learning(1991). She found the significant role of context in reshaping individual's perspectives. She said, “It became clear that both the shape and the direction of transformative learning is determined by the background and by the immediate circumstance of the learner”(Clark, 1991).

Another significant aspect of social and cultural context is that it may offer insight to understand the nature of disorienting dilemma(Taylor, 2000). Fifteen out of twenty-five students experienced disorienting dilemmas in this study. However, only six students reported perspective transformation. In transformative learning the role of disorienting dilemma is significant as it leads into perspective transformation through critical self-reflection of assumptions. However, such case did not often take place among the sojourners; disorienting dilemmas frequently did not bring major perspective changes. Taylor indicated that not all crisis leads to major perspective shifts. Taylor writes,

“Mezirow's description of a disorienting dilemma has been criticized as being decontextualized, as though all life crisis would lead to a perspective transformation. As we know this is not the case.(Taylor, 1997).”

This phenomenon may require more in depth study of social and cultural

context in the process of disorienting dilemmas. Taylor(1998) also argues that in transformative learning, educators need to consider the important role of context to better comprehend the nature of disorienting dilemma. He suggests,

“More specifically, this perspective could possibly provide insight into why some disorienting dilemmas lead to a perspective transformation and others do not. An in-depth investigation into the context of disorienting dilemmas may help reveal the social and tool dependent nature of a perspective transformation (Taylor, 1998).”

American social and cultural context, especially academic structure strongly impacted the sojourners because it provided “a supportive environment.” Through it, the students had a sense of elevated self who is autonomous, self-confident, opened, and found their self-identity. Changed self-image in academic and social context tended to accelerate their intercultural adjustment. Because American academic and social context made them boost their self-esteem, the sojourners seemed to easily change their ways of thinking and life. This phenomenon can be supported with Jacobson's view that context plays a key role in learning. He said, “Contexts do not simply provide useful information in support of thinking and learning, but are inseparable from cognitive process”(Jacobson, 1996).

Through intercultural experience, the students changed their meaning structures due to the influence of American academic and social culture. Social context is inseparable from the learning process because individuals learn through interaction with their social and cultural environment. Although Mezirow's transformative learning mentions the role of context in learning, he seems to mainly focus on individual aspect of cognition and rational approach.

The academic and social context greatly impacted the sojourners from collectivistic culture. The sojourners were compelled to change their ways of thinking and life due to social and cultural context while in the States. Mezirow's transformative learning needs to include the significant aspect of social and cultural context.

Conclusion

This study, linking intercultural adjustment and transformative learning theory, examined how learning takes place in a new cultural context. The rationale for this study was that 1) the transformative learning has been applied mainly in Western context 2) there has been a lack of study on how actually learning takes place in a new cultural context (learning process).

The findings revealed that unlike transformative learning's focus on critical reflection and rational discourse, the students changed their ways of thinking through subjective factors. The role of emotion and social relationship including modeling, fellowship, and friendship has greatly affected the sojourners to change their ways of thinking.

Another important finding is that the role of social and cultural context also played a key role to change the sojourners' perspectives. American individualism and academic structure strongly impacted the students to change their perspectives.

This study also found the learning process in a new cultural context which contains both transformative and assimilative learning. Both positive and negative feelings played an important role to bring about perspective changes among the sojourners.

The nature of intercultural adjustment provided more integrated perspectives

on transformative learning that faces many concerns and issues due to its over focus on rationality, the individual aspect of learning, ambiguous role of context and lack of empirical studies with the non-Westerners. Transformative learning theory needs to embrace more diverse subjective factors and focus on the role of social and cultural context that influences the learning process and outcome.

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요 약

다문화적응과정을 통한 전환학습

박 경 호

이 연구에서는 다문화적응을 토대로 외국 유학생들의 의미구조의 변화를 조사하였다. 동아시아에서 온 대학원학생들을 대상으로 의도적인 샘플링을 25명 선정하여 질적 연구를 시행하였다. 이 연구를 통해서 외국대학원생들에게서 다문화적응을 통해 전환학습이 발생하였고, 의미구조의 본질은 메지로우(Mezirow)의 전환이론에 좀 더 다양한 시각을 제공하였음을 발견할 수 있었다. 미국의 개인주의와 학문구조를 포함하는 사회 문화적인 상황배경이 학생들에게 좀더 자기중심적인 삶을 살도록 촉진하였고, 그들이 좀더 자신의 삶에 집중함으로써 자신들의 정체성을 발견하였다. 학문구조를 통하여 학생들은 자기가치(self-esteem)가 증진되었고 이는 그들의 관점의 변화를 촉진시켰다.

또한 이 연구에서 관점전환(perspective transformation)을 야기하는 주관적 요인들의 중요성을 발견하였다. 모델링과 친구관계를 포함하는 사회적 관계가 중요한 변화의 요인이었다. 긍정적인 감정들을 통하여 주로 동화학습을 통해 그들의 의미체계(meaning schemes)들을 변화시켰다. 축적된 의미체계의 변화들은 학생들에게 관점전환을 야기하는데 중요한 역할을 하였다. 부정적인 감정들은 학생들에게 비판적인 자아성찰에 빠지게 하여 관점전환을 촉진시켰다. 비판적 성찰과 감정이 상호작용하여 학생들에게 가정에 대한 비판적 성찰에 참여하게 하여 관점전환이 발생하도록 하였다. 동화 및 전환학습은 학생들에게 새로운 자아상(self-image)을 형성하도록 하였는데 이는 열린 관점, 자신감의 증진, 가치 변화, 그리고 새로운 방식에서의 생각과 삶이다.

이 연구는 다문화적응을 통하여 전환학습이론의 본질에 좀더 통합적인 시각을 제공하는데 기여했다. 주관적 요인들과 사회 문화적 상황의 역할의 중요성을 인정함에 따라 전환학습이론은 점차 확대되고 확증되고 있다.

핵심되는 말 : 전환학습, 성인학습, 다문화적응