

“YOU’RE NEVER ALONE, YOU KNOW”: UNDERSTANDING THE EXPERIENCES OF
TRAINERS WHO COMPLETED A CERTIFICATION PROCESS IN A PROFESSIONAL
DEVELOPMENT SYSTEM

by

SARA JANE BLACKMAN

(Under the Direction of Laura L. Bierema)

ABSTRACT

The purpose of this study was to use a Constructivist Grounded Theory methodology to understand the learning experiences of trainers who completed a professional development trainer certification. Specifically, this study explored how trainers described their learning experiences, the catalysts trainers identified as instrumental to their learning, and the nature of developmental relationships in the learning process. By uncovering an understanding of these learning experiences, the study provides valuable insights into improving professional development programs’ effectiveness and the nature of the developmental relationships that support learning experiences. Ten trainers were interviewed using a semi-structured interview guide. Data analysis suggested that the factors that most strongly influenced learning and transformation include the evolving learner identity, the formal structure and resources of the certification process, learner engagement, developmental relationships, peer learning, identification of transformation, and the nurture of a lifelong learner mindset. Using these factors, a theoretical framework, Professional Development Components for Learning and Transformation, was developed to design transformative trainer certification processes.

INDEX WORDS: professional development, training, trainer, adult learning, developmental relationships, coaching, transformative learning, transformational experiences, constructive development, constructivist grounded theory

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DEDICATION

“Through others, we become ourselves” (Vygotsky, p. 105, 1997).

I initially joked that I only started the Ph.D. program to become ‘Dr. Mom.’ Now I realize the true essence of this title lies not in expertise but in the awareness of the boundless depths of knowledge that still elude me.

It's funny how a single transformative experience can set us on a path we never imagined. When I began my graduate journey, I was teeming with excitement and motivation, blissfully unaware of how much I had yet to learn. But as I dug into the work and met peers and debated theories and tested complexities, I underwent another transformation, subtly reshaping my thoughts, perceptions, and understanding of the world around me.

And then came my dissertation study – a journey within a journey. It changed me profoundly, altering not just my perspectives but also my very essence. It changed the way I see people. It changed the way I think. It changed the way I understand my world. And most importantly, it added depth to the way I see my fellow human beings. What did I learn? That we're simultaneously exactly the same and utterly unique, each person a universe unto themselves.

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“There’s a world of difference between insisting on someone’s doing something and establishing an atmosphere in which that person can grow into wanting to do it” (Rogers, p. 78, 1995).

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CHAPTER 1

INTRODUCTION

Organizations across the world must grapple with a universal challenge: how to support employees to develop competencies needed for job performance and ensure the organization's successful future. Most organizations use some form of professional development (PD) design to meet this challenge. PD plays a crucial role in enhancing employee performance, promoting growth, and maintaining a competitive edge in the market. The PD market has experienced significant growth in recent years, driven by the increasing need for continuous learning and skills enhancement in the rapidly changing global economy (Bersin, 2017). This market includes a diverse range of services, products, and delivery methods, such as training programs, workshops, seminars, online courses, and coaching, designed to help individuals and organizations improve their performance and achieve their goals (Noe, 2017).

The fast-paced development and adoption of new technologies require employees to continuously update their skills and knowledge to stay competitive and relevant in their respective industries (Bersin, 2017). With an increasingly diverse and multi-generational workforce, organizations must invest in professional development to accommodate different learning styles, preferences, and needs (Bersin, 2017; PwC, 2017; Technavio, 2023). Employees must be equipped with the necessary skills and knowledge to navigate different cultures, languages, and markets. In addition to technical skills, organizations increasingly recognize the importance of soft skills, such as communication, teamwork, and leadership, which are essential for success in today's complex and collaborative work environment (Klein et al., 2006). In

organizations, PD is also driven by the desire to attract and retain top talent. Research shows that PD is a key driver of employee satisfaction, engagement, and loyalty (Bakker & Demerouti, 2008). Given the growing importance of professional development in today's dynamic business landscape, it is critical for organizations to continually assess their learning and development strategies, ensuring they are aligned with their business objectives and workforce needs.

What is Learning?

Learning is an ambiguous term widely used in many fields, especially education and psychology, and definitions vary. The author defines learning as the incremental increase in knowledge and competence through micro and macro interactions with the environment. Learning can be positive or negative. Additionally, knowledge in the broadest sense does not require the information to be factual. For instance, there are people who, after a great deal of studying the subject, still believe the earth to be flat (O'Neill, 2008). The constructivist perspectives of Piaget (1970) and Vygotsky (1978b) are the primary influencers of my view on learning. Constructivists propose that learning experiences allow learners to construct new knowledge by integrating new information with existing knowledge. This can be through individual cognitive processes (Piaget, 1970) or social interactions (Vygotsky, 1978b).

However, many other perspectives capture the essence of learning. Kolb's (1984, 2014) Experiential Learning Theory posits that learning is a process that involves concrete experience, reflective observation, abstract conceptualization, and active experimentation. In this model, learning involves engaging with the environment, reflecting on the interaction, abstractly conceptualizing the experience, and experimenting with new knowledge or skills. Lave and Wenger's (1991) theory of situated learning suggests that a person's learning experiences cannot be separated from their social, cultural, and physical contexts. Learning occurs through

participation in communities. Transformative Learning Theory (TLT) (Mezirow, 1978, 1993, 1997) proposes that learning experiences involve critical reflection and can transform perspectives or beliefs. Mezirow's work will be explored more deeply in this manuscript. Finally, informal and incidental learning (Marsick & Watkins, 2001) often occurs outside of formal educational settings and are primarily self-directed. These experiences are typically driven by the learner's interest or the need to solve immediate problems. These theoretical perspectives share the view that learning is an interactive and transformative process involving engagement with the world around us.

Professional Development

PD refers to acquiring new skills, knowledge, and experience to enhance one's professional skills and keep up with changes and advancements in the industry or field (Schwartz & Bryan, 1998). It involves activities that help individuals to stay up to date with the latest trends and technologies and to improve their competencies, productivity, and performance in their jobs. PD takes many forms, such as formal classes or attendance at professional or industry conferences. Training and certification programs are prime examples of PD. It differs from workplace learning, which involves absorbing information through daily work activities and interaction. PD helps individuals to stay relevant and competitive in their profession. It provides opportunities to learn new information and practice skills, which can lead to better job performance and career advancement. Additionally, it can help individuals stay engaged and motivated in their work, improve their job satisfaction, and reduce the risk of burnout (Skaalvik & Skaalvik, 2014). Employers also benefit from investing in professional development as it can lead to increased employee satisfaction, retention, and productivity, as well as help the organization stay competitive and adapt to changes in the industry (Alrazehi & Amirah, 2020).

The top areas of focus include aligning learning with business goals, creating a culture of learning, and improving employee retention (LinkedIn Learning, 2023).

Professional development is big business. Currently a \$357.7 billion U.S. dollar industry, it is expected to grow by \$3.75 billion between 2022 and 2026 (Technavio, 2022). Businesses and educational organizations report several reasons for this anticipated increase: larger scope of training content, higher rates of new staff, the need to learn how to use new technology or equipment, and increased training costs (LinkedIn Learning, 2019; McCarthy, 2014). The 2019 LinkedIn Learning Workplace Report found that employees who spend time learning are 47% less stressed and 39% more likely to feel productive and successful. Additionally, 94% of employees would stay at a company longer if it invested in their career development, and 59% of employees say that opportunities for learning and development are an essential factor in their decision to take a job. A study by the Lumina Foundation (McCarthy, 2014) found that 94% of employers believe skills and competencies are more important than a candidate's undergraduate major. These statistics demonstrate the importance of professional development for employees and employers alike. Organizations can improve employee satisfaction, retention, productivity, and profitability by investing in learning and development opportunities.

Professional Development and Adult Learning

Adult learning principles are used in professional development to create engaging, effective, and relevant learning experiences for adult learners. These principles are based on the understanding that adult learners have unique characteristics and needs compared to younger learners. Malcolm Knowles, a prominent adult education theorist, developed the concept of andragogy, which focuses on the specific ways adults learn (Knowles, 1975, 1984). Knowles' (1984) adult learning principles include self-direction, prior experience, relevance, pragmatism,

respect, and peer learning. The preference for self-direction happens when adults take charge of their learning process and set their own goals. In PD, facilitators can encourage self-directed learning by offering choices in topics, activities, and learning methods, and by allowing participants to set their own learning objectives (Caffarella & Merriam, 2000). PD programs can build on adult learners' expansive prior experience by incorporating real-world examples, case studies, and problem-solving activities related to participants' work experiences (Merriam & Bierema, 2014). Adults are more motivated to learn when they see the immediate relevance of the content to their personal or professional lives, so connecting learning activities to participants' current job roles, challenges, and goals increases learner engagement (Caffarella & Merriam, 2000).

PD programs can emphasize adult learners' preference for practical, problem-centered learning experiences to abstract, content-oriented ones by applying new knowledge and skills to real-world situations and providing opportunities for practice and feedback (Merriam & Bierema, 2014). Significantly, successful PD programs recognize that adult learners need to be treated with respect and have their opinions valued. In professional development, facilitators can create a respectful learning environment by encouraging open communication, active listening, and the sharing of diverse perspectives (Caffarella & Merriam, 2000). Finally, effective PD promotes collaboration through group activities, discussions, and peer coaching or mentoring (Merriam & Bierema, 2014). Adult learners benefit from collaborative learning experiences where they can interact with peers and learn from each other.

Transformative Experiences in Professional Development Systems

Transformative experiences play a significant role in PD, as they can lead to profound and lasting changes in an individual's perspective, values, and behavior. These experiences can

enhance the effectiveness of professional development programs and support personal and professional growth. The TLT, developed by Jack Mezirow (1997), provides a framework for understanding the importance of transformative experiences in professional development.

Transformative learning emphasizes the importance of critical reflection in challenging and reassessing one's assumptions, beliefs, and values (Mezirow, 1997). In PD, transformative experiences can encourage participants to examine their professional practices critically, identify areas for improvement, and make meaningful changes (Cranton, 2006). Transformative experiences can also lead to increased self-awareness, which is essential for personal and professional growth (Mezirow, 2000). Through self-awareness, individuals can recognize their strengths and weaknesses, develop a deeper understanding of their professional identity, and make informed decisions about their career paths (Cranton, 2006).

As professionals encounter new challenges, transformative experiences can help them develop adaptability and resilience by broadening their perspectives and fostering a growth mindset (Taylor, 2008). This mindset allows individuals to embrace change, learn from failures, and persist in the face of adversity (Dweck, 2006). In addition, transformative experiences can foster empathy and collaboration as individuals develop a deeper understanding of diverse perspectives and experiences (Mezirow, 2000). PD can lead to more effective teamwork, improved communication, and stronger relationships with colleagues and clients (Cranton, 2006). Finally, transformative experiences can cultivate a lifelong learning mindset as individuals become more open to new ideas and experiences (Mezirow, 1997). This mindset is essential for staying current with evolving professional knowledge, skills, and practices and can contribute to long-term career success.

Statement of the Problem

PD systems are designed to increase skills and expand perspectives, but it is often unclear how this is experienced and which activities really matter. Professional learning content developers face many challenges in choosing meaningful learning formats, activities, and resources. One of the most significant challenges is finding time for employees to attend training sessions, workshops, or other development programs. Employees often have demanding schedules and responsibilities, making it difficult to take time away from their work. The cost of PD programs can also be a barrier, particularly for smaller organizations. These costs can include fees for training, materials, and travel expenses, which can make it challenging to provide equal opportunities for all employees. This can lead to subject matter experts (SMEs) being tasked with creating learning activities. While SMEs can have deep knowledge and experience, they often lack critical instructional design or adult learning skills. Participation in professional development programs is voluntary, and some employees may not see the value in attending, especially if the content is unengaging. Motivating employees to participate fully in the training can be a challenge. Another dimension is learners' potential resistance to changes that result from PD programs. They may feel overwhelmed or resistant to change if the changes require them to learn new technologies or processes or take on additional responsibilities.

Another PD challenge is measuring effectiveness. It can be difficult to track how much knowledge or skills participants have gained and whether they have been able to apply them to their work effectively. Furthermore, PD programs often fail to provide follow-up support, coaching, or mentoring to help employees apply the knowledge and skills they have learned. This can result in participants forgetting what they learned or not knowing how to apply it to their job. Additionally, PD program content can quickly become outdated. Learners may only

value the PD experience if they perceive the materials as relevant to their current situation. These challenges highlight the importance of designing an engaging and appropriately challenging PD system.

The Purpose of the Study

The purpose of this study was to use a Constructivist Grounded Theory methodology to understand how learning was experienced by trainers who have completed a professional development certification. The guiding research question asks:

1. What are the learning experiences of trainers who have completed a professional development certification program?

Additional questions to support data collection and analysis include:

2. How do trainers describe their learning experiences?
3. What catalysts or triggers do they identify as instrumental to their learning?
4. What is the nature of the developmental relationships that support the learning experiences of these individuals?

The context of this study was a trainer PD system within a national non-profit organization that provides training and resources to family-support professionals. This system facilitates courses by certified trainers who progress through application, qualification, candidacy, certification, mentorship, annual growth plans, and formal recertification. Experienced and highly skilled trainers primarily use a coach approach to support trainer development.

Statement of Significance

This study contributes both theoretically and practically to the fields of adult learning and professional development. The study's findings supplement the current understanding of how

adult learning and coaching principles in PD systems can propel individual professional growth and transformation. The significance of this study lies in its contribution to improving PD systems by addressing the challenges that PD content developers face in creating meaningful learning experiences for employees. The study recognizes the importance of PD to increase skills and transform perspectives. By uncovering an understanding of the learning experiences of trainers who have completed a professional development certification program, the study provides valuable insights into improving PD programs' effectiveness and the nature of the developmental relationships that support learning experiences. Additionally, the study's methodology emphasizes the importance of the learner's experience and understanding of the learning process, which can inform the development of PD programs tailored to individual learners' needs. The study offers a new perspective on creating a supportive and engaging PD environment. The findings from this study also have the potential to inform the development of PD programs in other organizations and sectors, as the challenges and opportunities for PD are not unique to the context of this study.

CHAPTER 2

REVIEW OF THE LITERATURE

The purpose of this study was to use a Constructivist Grounded Theory methodology to understand how learning and transformation were experienced by trainers who have completed a professional development certification program. The guiding research question asks:

1. What are the learning experiences of trainers who have completed a professional development certification program?

Additional questions to support data collection and analysis include:

2. How do trainers describe their learning experiences?
3. What catalysts or triggers do they identify as instrumental to their learning?
4. What is the nature of the developmental relationships that support the learning experiences of these individuals?

This chapter consists of five sections. First, there is an exploration of theories and principles of professional development, adult learning, developmental relationships, and coaching. The second segment includes definitions of transformative and transformational approaches to learning and considerations of how they lead to sustainable transformation at the individual level. In the third segment, there are examples of how proponents of these approaches define the form that transforms. The fourth section synthesizes five empirical studies on transformative learning approaches and examines how we know transformation has occurred and their recommended strategies. Finally, in the fifth section, I conclude the chapter by acknowledging the limitations of transformative learning and the implications for my research.

Professional Development

Employee knowledge, skill, and performance are the foundation of any business or organization. Thus, professional development (PD) is critical for staff at all levels. Professional development (PD) systems aim to improve the career activities of individual learners through formal and informal learning (Mourão, 2018). PD activities can take many forms, including conferences, workshops, eLearning courses, mentoring, coaching, communities of practice, and other forms of training. Individuals' diverse experiences and worldviews interact with the context of the system, creating dynamic growth opportunities. The most effective PD systems are based on standards or competencies (LeMoine, 2020; Selvi, 2010) while also being responsive to learners' interests and real-world needs (Darling-Hammond & McLaughlin, 2011; Hargreaves & Dawe, 1990; Lieberman et al., 2011; Webster-Wright, 2009). As learners' knowledge, skills, and attitudes transform in alignment with stated competencies, they develop a considerable inventory of practical strategies and practices.

Professional development, also called human resource development or workplace learning, and adult education are closely related fields. Although the fields make distinctions about their purposes, histories, and participants, PD and adult education both “bring scholars, professionals, and practitioners together to address questions related to the practice of helping adults learn” (Watkins & Marsick, 2014, p. 42). Compensation and promotion are often linked to PD and educational accomplishments (Schwartz & Bryan, 1998). Early PD efforts in the U.S. aimed to increase the skills of an unprepared corporate workforce during World War II (Watkins & Marsick, 2014). The federal government created Training Within Industry, a formal training program to improve the American workforce through job instruction, methods, and relations. Subsequently, corporations began to develop their own programs designed to provide an

unskilled workforce with the knowledge and practice needed to accomplish daily tasks. By the 1950s, PD efforts began incorporating more comprehensive approaches to improve the entire organization. Businesses shifted to a more strategic approach in the 1980s and developed formal career pathways and certifications aligned with their goals and objectives. In education, formalized teacher training programs were created early in the 20th century and focused primarily on pedagogy and subject knowledge, with little emphasis on ongoing learning and professional development (Schwartz & Bryan, 1998). A growing recognition of the need for ongoing PD in the 1960s led to a shift from teacher preparation to teacher development. PD began to include workshops and conferences. The end of the 20th century brought a greater emphasis on educational standards and student learning outcomes (Consenza & Buchanan, 2018). PD programs were designed to show educators' positive impact on students.

More recently, online learning has enabled new ways of learning and development. Companies and educational institutions are using these platforms to provide employees with greater access to training and development opportunities, as well as to track their progress and provide ongoing feedback and support. Generally, in both educational and business realms, PD has become more collaborative and focused on improving learning outcomes and real-world skill development by adopting new technologies and methods and staying current with the latest research. Many scholars have made recommendations for PD in education and training. Guskey (2002, 2009) emphasized the importance of using a comprehensive approach to evaluate professional development, considering multiple impact facets. His work emphasized the importance of using a comprehensive approach to evaluate professional development by considering various impact levels. The first level considers how learners in a PD program engage with the learning and react to the experience. Another level considers the knowledge, skills, and

strategies contained in the learning program. The next level looks at the program from the organizational perspective. PD should be directly related to the daily work of learners within the organization. Finally, Guskey (2002, 2009) recommends that PD be based on student learning outcomes. This means providing learners with the knowledge and skills to meet the diverse needs of students, including those with disabilities, English language learners, and students from diverse cultural and socioeconomic backgrounds (Darling-Hammond, 2005). Evaluation of all five PD levels is critical to fully understanding the program's impact. He also emphasized the importance of using multiple data collection methods, such as surveys, observations, and student achievement data, to ensure a comprehensive evaluation.

Lieberman's (1995) concept of job-embedded professional development changed PD implementation. Like Guskey (2009), Lieberman argued that PD programs should provide professionals with hands-on practice in addition to workshops and other formal training. Darling-Hammond (2005) pointed to the success countries outside the U.S. have had in training and retaining teachers, noting that Japan requires prospective teachers to attend 20 days of clinical work in the first year in addition to formal classroom study. Darling-Hammond (2005) recommended providing teacher candidates with opportunities to work in real classrooms under the supervision of experienced educators to gain practical experience and refine their teaching skills. Webster-Wright (2009) contended that PD should focus on authentic professional learning and reflection connected to the learner's day-to-day responsibilities. Authentic learning is driven by the learner's needs instead of competencies defined by an external authority.

Additionally, professional learning should be an ongoing dialogue among peers rather than a series of isolated workshops or training sessions. Learners should be encouraged to share their expertise, insights, and experiences to create a learning community. This approach allows

PD participants to collaborate with colleagues, reflect on their practice, and receive ongoing feedback and support.

Hargreaves and Dawe (1990) encouraged peer coaching in PD rather than mandated or forced collaboration that lacks authenticity. This approach to PD is characterized by an authentic culture of collaboration, where learners work together voluntarily to improve performance and skill. Peer coaching involves learners working together in a supportive and structured way, with one peer coaching the other. Peer coaches provide partners with ongoing feedback, support, and collaboration, often leading to a shared vision (Hargreaves & Dawe, 1990). A PD program in Bogota found peer coaching “became a professional development strategy since the participants were able to enhance their knowledge about the teaching profession from each other and test new teaching tools, techniques, and strategies with their students” (Porras et al., 2018, p. 180). Another study “showed that peer coaching-based personalized learning approach had a significant influence on the teachers’ learning design skills and in-practice teaching abilities” (Ma et al., 2018, p. 302).

Like peer coaching, Lieberman et al. (2011) recommended using learning communities as a PD method. Learning communities are a powerful way to support teacher learning and improve student outcomes. They are based on the idea that teaching is a complex and dynamic profession that requires ongoing learning and growth. Learning communities focus on developing the knowledge, skills, and strategies directly impacting the learner’s performance. To be successful, community conveners must set the norms for open and honest communication, respecting the expertise and perspectives of all members, and valuing the diversity of experiences and backgrounds within the community.

Effective PD requires ongoing improvement. PD should focus on improving learning and skills rather than compliance or superficial changes. This requires continually reviewing program materials and resources and ensuring that the program includes opportunities to learn and apply research-based strategies and use data to inform their practice. A critical addition to this is customizing learning to meet the needs of individual participants based on their prior knowledge and experience, as well as their specific needs and goals (Darling-Hammond, 2005).

Overall, PD provides opportunities for trainers and educators to learn new strategies, techniques, and methods to improve practice, responsiveness to learners' changing needs, and better meet the diverse needs of students. It provides access to new research and the latest techniques to adapt accordingly. Effective PD systems can build community, providing space for collaboration and continuous improvement. Additionally, PD can prepare educators and trainers for leadership and new opportunities.

Training and Professional Development

Training and professional development are related yet distinct concepts in the context of an individual's career growth and an organization's success (Buckley & Caple, 1990; Noe, 2017). The differences between the two can be categorized by their purpose, scope, time frame, and responsibility. Training is focused on equipping individuals with specific skills and knowledge required to perform a particular job or task, often with immediate or short-term objectives in mind (Armstrong, 2006). It aims to enhance employees' performance in their current roles or prepare them for new organizational responsibilities. On the other hand, professional development encompasses a broader range of activities aimed at long-term career growth and personal advancement (Garavan, 1991). It is designed to improve an individual's

overall competence, knowledge, and skills in their chosen profession, helping them progress in their careers and remain relevant in the job market.

Training generally targets job-related skills, such as learning new software, mastering a sales technique, or understanding safety procedures (Salas et al., 2012). It is usually tailored to address specific needs or gaps within an organization or individual's role. Professional development covers a broader array of learning opportunities, including workshops, conferences, mentorship programs, advanced education, and certifications (Marsick & Watkins, 2001). These activities go beyond immediate job requirements and help individuals acquire new skills, stay updated with industry trends, and expand their professional networks. Training tends to be short-term, focusing on immediate or near-future needs (Fairfield-Sonn, 1987; Noe, 2017). It can be a one-time event or a series of sessions designed to address specific skills or knowledge gaps. Professional development, in contrast, is an ongoing process that occurs throughout an individual's career (Nadler, 1974). It involves continuous learning and adaptation to remain competitive and thrive in the long term.

The organization typically provides or sponsors training, with the employer identifying the needs and arranging for the necessary resources, including trainers, materials, and time (Aguinis & Kraiger, 2009). Professional development, while often supported by organizations, is primarily the responsibility of the individual (Blume et al., 2010). Employees are encouraged to take charge of their personal growth by seeking out opportunities, setting goals, and staying proactive in their careers. Training is focused on specific, job-related skills for immediate application, while professional development involves a broader range of activities aimed at long-term career growth and personal advancement.

The Role of the Trainer

A trainer “is a person who creates and delivers learning programs to teach employees skills that are beneficial for their professional development” (Indeed Editorial Team, 2022). Over the last several decades, the role of the trainer has evolved from that of a top-down instructor to a facilitator of learning who guides participants toward achieving their learning objectives (Bell et al., 2017; Darling et al., 1999; Eitington, 2007; Sloman, 2005). Merriam-Webster (n.d.) defined a facilitator as “someone who helps to bring about an outcome (such as learning, productivity, or communication) by providing indirect or unobtrusive assistance, guidance, or supervision” (para. 1). Trainer characteristics significantly influence trainee satisfaction, perceived learning, and intention to transfer knowledge (Bell et al., 2017; Darling et al., 1999; Eitington, 2007; Glerum et al., 2021; Leduchowicz, 1982; Salas et al., 2012; Sloman, 2005). Studies have identified and ranked various traits important for trainers, including subject-matter knowledge, communication techniques, content-specific instructional knowledge, clarity, structure, relationship-building, and creating a constructive learning environment (Bennett & Leduchowicz, 1983; International Board of Standards for Training, Performance, and Instruction, 1988; Wisshak & Hochholdinger, 2018). Additionally, expert trainers possess critical personality characteristics such as responsiveness, humor, sincerity, flexibility, and tolerance (Burke & Hutchins, 2008; Gauld & Miller, 2004). Trainers must deeply understand the training objectives and ensure the training design aligns with the organization’s goals and the learners’ needs to effectively transfer knowledge and skills to the workplace (Bell et al., 2017; Eitington, 2007). This usually requires trainers to be subject matter experts (SME). An SME has a solid foundation in the training content and related skills to effectively teach and convey concepts to learners (Bennett & Leduchowicz, 1983; Leduchowicz, 1982; Noe, 2017). By staying current with industry trends

and continually updating their knowledge. SMEs display confidence in their abilities to create a positive and motivating atmosphere for learning.

Many times, the trainer is also responsible for developing the training content. Thus, trainers must be adept at creating and delivering engaging presentations, using various visual aids and multimedia tools to support their content. The instructional design process includes selecting appropriate instructional methods (Salas et al., 2012; Wisshak & Hochholdingner, 2018). The choice of training delivery methods (e.g., face-to-face, online, blended learning) significantly impacts training effectiveness, and scholars recommend a mix of methods to cater to diverse learning styles and needs (Bell et al., 2017; Darling et al., 1999; Eittington, 2007; Leduchowicz, 1982; Sloman, 2005). These methods include lectures, discussions, case studies, and role-playing. The emphasis on learner-centered approaches requires trainer adaptability. Flexible accommodates the individual needs of trainees and varying contexts and involves skillfully facilitating group discussions, encouraging participation, and managing group dynamics to ensure a productive learning environment (Kolb, 1984). Real-time adjustments in training content and approaches mean trainers must plan and manage their time effectively, ensuring they cover all relevant content within the allotted time frame. Understanding the individual characteristics of learners, such as their motivation, ability, and prior knowledge, is crucial for tailoring training programs and maximizing their effectiveness (Bell et al., 2017; Bennett & Leduchowicz, 1983). Sensitivity to cultural differences also leads to the adaptation of training approaches to accommodate their trainees' diverse backgrounds, beliefs, and values. Today's learning needs also require trainers to leverage technology as part of their presentation tools. Embracing technology, such as e-learning platforms, multimedia tools, and other digital resources, enhances the learning experience (Eittington, 2007). The rise of digital tools and

platforms has transformed the learning landscape, and trainers need to stay current with new technologies to engage and support learners effectively (Sloman, 2005). Effective trainers are proficient in using digital tools and platforms.

Training facilitation also requires a wide range of communication skills. Being able to convey information clearly and concisely is crucial for successful training. Creating engaging, interactive, and learner-centered instruction necessitates the trainer communicate in ways that stimulate learning by promoting active participation and knowledge retention (Bell et al., 2017). Learners are sensitive to content delivery and quickly identify when the facilitator's communication skills are incongruent with the concepts presented (Boendermaker et al., 2000). Trainers must clearly convey information and ideas using simple and understandable language. This includes verbal and non-verbal communication, such as body language, tone, and facial expressions. Enthusiasm for the subject matter can be contagious, inspiring participants to learn and retain information (Bennett & Leduchowicz, 1983). Trainers' communication methods can show empathy and supportiveness that helps establish rapport (Boendermaker et al., 2000; Darling et al., 1999). Providing guidance, encouragement, and constructive feedback fosters a nurturing learning environment for trainees. Effective trainers also listen to participants' concerns, questions, and feedback to tailor their teaching approach. Trainers must listen attentively to their trainees, understand their needs, and respond accordingly. Listening helps to build trust and creates a positive learning environment (Rogers, 1983).

The literature is clear that ongoing learning is vital for trainers to ensure they stay up-to-date with the latest trends, research, and best practices in the field (Bell et al., 2017; Boendermaker et al., 2000; Darling et al., 1999; Eitington, 2007; Gauld & Miller, 2004; Glerum et al., 2021; Noe, 2017; Rogers, 1983; Sloman, 2005). Continuous learning enables trainers to

acquire new skills and knowledge to enhance their teaching methods. Trainers engage in lifelong learning in various ways, including formal education and certification programs. Collaboration and networking with other professionals within and outside their organization helps trainers develop and share best practices, learning resources, and new ideas. Reflective practice is another way trainers learn (Schön, 1983). Self-reflection and openness to feedback helps trainers improve their teaching methods and adapt to trainees' needs. Reflection also supports setting and achieving goals related to facilitation practice. Reflection is also part of a trainer's self-evaluation and assessment (Bell et al., 2017; Eitington, 2007; Glerum et al., 2021; Kirkpatrick & Kirkpatrick, 2016; Noe, 2017; Rogers, 1983; Sloman, 2005). Trainers must regularly assess the effectiveness of their training sessions and incorporate feedback from learners to refine their approach. Ways to evaluate training effectiveness include measuring learning outcomes, knowledge transfer to the workplace, and overall impact on the organization.

Trainer Development and Certification Programs

In today's ever-changing business environment, organizations need to invest in the continuous development of their employees to maintain a competitive edge. A vital aspect of this investment is the development of trainers who can effectively transfer knowledge, skills, and abilities to the workforce (Johnson & Leach, 2001; Pearce et al., 2012). Trainer development is essential for organizations as it leads to improved training quality, increased employee engagement, and better learning outcomes (Noe, 2017). Trainer certification programs, often called *train-the-trainer* (TTT) models, are educational and capacity-building approaches designed to disseminate knowledge and skills more effectively within organizations or communities (Johnson & Leach, 2001). In this model, a group of individuals, often called

trainers or *master trainers*¹, receive specialized training on a specific topic, skill, or program. These individuals may be existing trainers or individuals who have been identified as having potential to become trainers. These trainers then become responsible for teaching and training others within their organization or community, effectively multiplying the reach of the initial training. The TTT model has become increasingly popular in recent years, particularly in the context of professional development and workplace training and typically focuses on developing skills such as instructional design, delivery, assessment, and feedback.

The TTT model has been used in a variety of contexts, including healthcare, education, and the corporate sector. In healthcare, the TTT model has been used to train healthcare professionals to become trainers in patient safety, infection control, and other areas of healthcare. For example, in a study by Kalisch et al. (2013), nurses became trainers in a medical-surgical TTT program focusing on teamwork, leadership, and incidents of missed care. The authors found that the TTT model was effective in building teamwork knowledge in the organization and lowering incidents of missed care, and that the trained nurses were able to deliver training to their colleagues effectively. In the education sector, the TTT model has been used to train teachers to become trainers in various aspects of education. For example, in a study by Edgoose et al., (2021), a group of teachers was trained to become trainers in teaching about racism. The authors found that the TTT model was effective in building the capacity of the trained teachers to deliver training to their colleagues effectively. In the corporate world, the TTT model was used to support mentors in a first-year business competition (Peck & Pothier, 2022). The authors found that the TTT model was effective in supporting the mentors and improving the overall

¹ Note that many practitioners no longer recommend using the term master trainer as it triggers connotations of slavery (Conger, 2021; Coughlan, 2016).

quality of the competition. They reported that the program has led to increased engagement and satisfaction among the mentors, as well as improved learning outcomes for the student participants.

The TTT model has several key benefits. First, the model allows for the rapid dissemination of knowledge and skills across an organization or community, as the trained trainers can provide instruction to multiple individuals, who may, in turn, train others (Johnson & Leach, 2001; Pearce et al., 2012). By training a group of individuals to become trainers, an organization can ensure that training is delivered consistently and to a high standard. This can be particularly important in organizations that rely heavily on training, such as those in the education or healthcare sectors. Additionally, learners often work alongside experienced trainers. Thus, the learning extends beyond the training environment. This approach can be more effective than traditional classroom instruction, particularly if the experienced employees are trained to be effective trainers (Edgoose, 2021; Peck & Pothier, 2022). Second, the TTT model can help to reduce the cost of training (Johnson & Leach, 2001). By training a group of individuals to become trainers, an organization can reduce the need to hire external trainers or pay for expensive training programs. This can be particularly beneficial for small organizations or those with limited budgets. Another benefit of the TTT model is its promotion of professional development and career advancement for individuals. By providing individuals with the skills and knowledge to become trainers, organizations can offer a pathway for career advancement and recognition. Empowering individuals within the organization or community to become trainers fosters a sense of ownership and engagement in the learning process, leading to better training outcomes and higher motivation to apply the learned skills (Peck & Pothier, 2022). A fourth benefit of the TTT model is the stimulation of knowledge transfer and sharing (Martinez

Leal et al., 2022). By training a group of individuals to become trainers, an organization can promote the sharing of knowledge and best practices within the organization. This can help to build a culture of continuous learning and improvement, as trainers can share experiences, best practices, and feedback with each other and adapt their training methods accordingly. Finally, trainers who are part of the organization or community can tailor the training content to better suit the specific needs, culture, and context of the audience (Anderson & Taira, 2018).

While the TTT model offers several potential advantages, it also has some limitations. The TTT model may not be suitable for all organizations or training contexts (Pearce et al., 2012). While the model is highly effective in organizations that rely heavily on training or where consistency in training delivery is particularly important, TTT may not be necessary or cost-effective in organizations where training is where training needs are inconsistent or less predictable. The TTT model can also require a significant investment of time and resources (Anderson & Taira, 2018; Johnson & Leach, 2012). In addition, the TTT model may not be suitable for all individuals. Some individuals may not have the necessary skills or aptitude to become trainers or may not be interested in taking on this role (Johnson & Leach, 2001). Employees may be considered SMEs yet lack the necessary instructional design and delivery skills to be effective trainers. Moreover, they may also lack the time and resources to dedicate to training activities. It is important for organizations to carefully select individuals for TTT programs to ensure that they have the potential to be effective trainers and are interested in taking on this role.

Andragogy Principles in Professional Development and Training

In the late 1960s, Knowles (1980, 1996) introduced the concept of *andragogy* into the American lexicon when he borrowed the European term to differentiate adult learning

approaches from childhood education. Knowles (1980, 1984) outlined several principles and assumptions about adults and how they learn: (1) adults have a self-conception and prefer self-direction, (2) previous and current experiences become a resource for learning, (3) readiness to learn is related to one's social roles, (4) orientation to learning is based on solving real-world problems, (5) adults learning is internally motivated, (6) adults prefer to be involved in the planning and evaluation of their learning, (7) social interaction supports learning experiences, and (8) adults need feedback to evaluate their understanding and performance. These principles suggest that adults' learning motivations, epistemologies, and orientation are distinct from those of children. Knowles' (1980) andragogical theory is foundational in adult development programs.

Contemporaneously with Knowles' early work, Tough (1978) studied adults who engaged in what he called learning projects. He found that instructor-led learning only accounted for 20% of learning. Most learning projects (73%) were self-planned. His findings helped shape future adult education research and indicated adults prefer to take responsibility for their own learning and want to be involved in the planning and evaluation. Adult growth and development are "closely linked to self-directed learning as a cognitive process purposely controlled by the individual himself and directed towards comprehensive improvement" (Kolberg et al., 2014, p. 654). Notably, Knowles' work indicated a *preference* for self-directed learning. Cranton (1994) observed that practitioners often interpret self-directed theory to mean adult learners are always self-directed. Learners' preference for self-direction depends on the material being learned, the learning context, and individual predilections. A learner "may be self-directed in one area and not in another" (Cranton, 1994, p. 728). Although Brookfield (2009) valued self-direction, he cautioned against making the approach the default facilitation method in every

learning opportunity. Educators must thoughtfully decide when and how to apply self-directed learning approaches. Adult maturation is an essential factor in andragogy. As adults mature developmentally, “they are capable of directing, or at least assisting in planning, their own learning” (Merriam, 2001, p. 5).

In a self-direction approach, educators do not attempt to manage adults’ learning. Ownership for learning resides with the learner, not the educator (Marsick et al., 2014). The educator’s role is to support, encourage, and facilitate learning. Variations in learner maturation and abilities influence the educator’s level of involvement (Grow, 1991; Marsick et al., 2014). Outside of formal classrooms, adults regularly create tacit self-directed learning plans. For example, an individual who wants to learn how to bake sourdough bread will consider possible sources of information and instruction. They might choose to employ any combination of activities, such as consulting a friend or relative, watching a tutorial, researching recipes and methods online, or attending a baking class. However, Garrison (1997) clarified that self-direction does not mean complete autonomy. Learners negotiate learning opportunities collaboratively, whether in a formal classroom or the world at large. He believed “we live interdependently and knowledge is socially determined” (Garrison, 1992, p. 141). The collaboration may be between the instructor and student or between individuals in social settings. The collaboration could even be between the learner and material resources (e.g., books, websites, podcasts). In this “collaborative constructivist” (Garrison, 1997, p. 30) perspective, the learner takes responsibility for constructing meaning and collaborates with others to validate the new learning.

Adults’ prior experiences can be a valuable resource because they provide a foundation upon which to build. Knowles (1970) stressed, “To an adult, his experience *is* him” (p. 61, italics

in original). When a learner's experience is disregarded, it is the equivalent of disregarding the learner. Learners make connections with new learning based on previous learning and experiences. When adult educators can make those connections more explicit, learners can better process and utilize new information. For instance, learning can be more efficient when a learner understands patterns in one concept, and the educator can link the concept to new ideas. However, relying too heavily on learner experiences can be problematic. Kolb (2014) contended that previous experiences are colored by the learner's biases and can result in incomplete or misconstrued understanding. Research has shown that human judgments are often flawed based on the availability heuristic (Tversky & Kahneman, 1974). This happens when individuals overgeneralize their own experiences. To balance this influence, Kolb (2014) recommended experiential learning include concrete experiences, reflection on observations, critical abstraction, and active experimentation. Additionally, collaboration allows learners to learn from and in tandem with peers, and this shared experience tends to correct individual biases. Combined perspective calibrates limited understanding. Furthermore, social interaction inspires extended learning.

Adults seek learning experiences relevant to their professional and personal roles (Knowles, 1984). Actively involving learners in planning and evaluation allows them to designate connections to their lives. Knowles (1970) cautioned, "Teachers of adults who do all the planning for their students, who come into the classroom and impose preplanned activities on them, typically experience apathy, resentment, and probably withdrawal" (p. 58). Active learning requires educators to become co-creators and partners with learners. This partnership makes learners active participants in learning and addresses their preference for self-direction. However, adult learners still benefit from clear, constructive feedback from educators.

Celebrating success spurs continued development, while constructive criticism helps learners pinpoint further areas of improvement.

Adult learners want to be actively involved in the learning process, with opportunities to collaborate with others and receive feedback on their progress. They also want to understand why they are learning something, how it applies to their lives and work situations, and how it will benefit them. These principles are often used to guide the development of effective adult learning experiences, including professional development programs. Incorporating these principles into professional development programs improves the quality of training and supports their employees' ongoing learning and development.

Despite widespread knowledge of Knowles' adult learning principles within learning and development programs, many traditional professional development (PD) programs continue to use outdated, strict behaviorist approaches to learning (Marsick, 1988), such as 'sit-and-get' or 'one-and-done' designs. Sit-and-get approaches use an instructor-centered teaching method. One-and-done refers to PD offerings convened with little or no pre-work or follow-up. PD is most effective when adult learning principles are intentionally embedded in the learning design (Lieberman, 1995; Marsick, 1988; Webster-Wright, 2009). A coaching approach is also a powerful way to facilitate learning using those principles. A coach helps facilitate learning by considering the learner's state and responding with the least amount of intervention required for learning. Cox (2006) argued, "Andragogy has reached its zenith with the advent of coaching as a learning approach" (p. 195). The application of coaching and adult learning principles fosters more profound learning and a learning culture that is more transformational, as forwarded by theorists like Mezirow (1985, 1993) and Kegan (1980, 2000).

Developmental Relationships

Developmental relationships take many forms: they can be formal or informal, short or long-term, internal or external to one's organization, and could be initiated by an individual or their organization (Douglas & McCauley, 1999; Rock & Garavan, 2006). These relationships are often used as a central component of or supplement to PD. Rock and Garavan (2006) defined developmental relationships "as either formal or informal relationships where an individual takes an active interest in and initiates actions to advance the development of another" (p. 330). Whatever form the relationship takes, the purpose of a developmental relationship is the progressive growth of one or both members in the relationship (McCauley & Young, 1993). Relationships are a vital aspect of learning. As Cox (2018) explained, "Connecting is the act of relating together to meet the operational demands of learning" (p. 78).

Developmental relationships are characterized by five roles: expressing care, challenging growth, providing support, sharing power, and expanding possibilities (Rock & Garavan, 2006). These functions are essential for creating meaningful relationships that support ongoing development and can be applied in a variety of settings, including PD systems, communities, and even families. Research indicates that employees who reported having relationships with multiple mentors, colleagues, and supervisors were more satisfied with their jobs than those who reported having fewer developmental relationships (Higgins, 2000). This research highlights the importance of organizations fostering a culture that values and supports the development of multiple relationships for employees, including in PD programs.

In the twentieth century, developmental relationships were traditionally lumped under the term mentor (Higgins, 2000). Today's developmental relationships include more diverse roles, such as counselors, consultants, trainers, and coaches (Bierema, 1999; Douglas & McCauley,

1999; McCauley & Young, 1993; Rock & Garavan, 2006). A comparison of these roles is provided in Table 2.1.

Table 2.1

Comparison of Developmental Relationships

Mentor	Counselor	Consultant	Teacher/Trainer	Coach
Provides expert advice to protégé (Boysen-Rotelli, 2021; Mertz, 2004; Peltier, 2011)	Heals emotional trauma or addresses mental health concerns (Bachkirova & Baker, 2019; Boysen-Rotelli, 2021)	Uses specialized skills or knowledge to solve an organizational problem (Boysen-Rotelli, 2021; Peltier, 2011)	Imparts new knowledge based on set learning objectives (Boysen-Rotelli, 2021)	Builds self-awareness to improve well-being and performance (Whybrow & Palmer, 2019)

Mentors are typically experts in their field who share their experiences with others, and they “focus on the career advancement or professional development of a protégé...within the professional context” (Mertz, 2004, p. 541). Mentors have a specific set of skills or experience and support others in developing those same skills. Mentors’ advice about potential pitfalls and shortcuts can hasten the mentee’s learning by helping “them interpret and understand how the rules work” (Peltier, 2011, p. 264). Some mentors are formally assigned within an organization, while other mentoring relationships begin informally through networking and social interaction. Although coaching might be used in a mentor relationship, “the role of the mentor extends outside of the coaching process” (Boysen-Rotelli, 2021, p. 5). Sometimes, other types of developmental relationships, such as a coaching or teacher-learner relationship, naturally morph into mentorship. Regardless of how mentoring starts, the relationship is typically long-term.

The term consultant can be thought of in two different ways. Some consider coaches to be a type of management consultant (Peltier, 2011). A bibliography on coaching defined a coach

as “a consultant who uses a wide variety of behavioral techniques and methods” (Douglas & Morley, 2000, p. 39). This type of coach-consultant usually has expertise in a specific area that interests the client. A second viewpoint considers consultants distinct from coaches and refers to them as business consultants. Like mentors, these consultants give expert advice. However, business consultants usually work in a more formal relationship. Consultants are hired to tell clients how to fix a problem (Boysen-Rotelli, 2021, p. 6). Sometimes, they complete assessments to determine needs and design a solution. Business consultants focus directly on a business’s content skills or technical skills” (Peltier, 2011, p. xxxi).

The boundary between coaching and counseling is the most complicated to define. Bachkirova and Baker (2019) noted that the current literature is generally split into two opinions. The first group believes boundaries between the professions are important but asserts practitioners should decide whether coachees need counseling based on intuition or in negotiation with the coachees. The other group argues that there need not be a choice between coaching or counseling, and both “practitioners should...be allowed to utilise all their skills to the coachee’s advantage” (Bachkirova & Baker, 2019, p. 488). They believe the two professions work best together to provide holistic support. Some coaches with clinical backgrounds even consider themselves therapist-coaches and perform both roles. However, it is essential to note that professional counseling or therapy requires licensing. Counseling tends to focus on addressing an unresolved problem from the past to progress into the future more healthily. Peltier (2011) clarified, “Counseling is personal, and it is aimed at personal problems” (p. xxix). When a traumatic event has not been healed, the resulting wound can negatively impact a person’s well-being. If they are not careful, coaches may end up “practicing psychotherapy without a license” (Peltier, 2011, p. 357). Unlike coaches, counselors must adhere to published standards of ethics

and practice. Additionally, therapeutic professionals have extensive education to help them handle trauma and mental health challenges.

Coaches as Developmental Partners

Across the field of coaching, there is little consensus on a single definition of coaching. Definitions are specific to organizations, contexts, and purposes. Although some organizations have developed coaching competencies, the profession does not require adherence to specific standards. Types of coaches range from executive coaches who help organizational leaders to “become more effective” (Peltier, 2011, p. xxxi) to life coaches who focus on “assisting individuals to clarify values, visions and meaning of life” (Spaten, 2019, p. 347). Within professional development settings, the “coach’s responsibility is to discover, clarify, and align with what the client wants to achieve” (Boysen-Rotelli, 2021, p. 4). The coach works to support self-awareness, leading to resolutions and strategies that are identified by the coachee. It is about moving the coachee from their current skill or performance level to where they want to be. The role of a coach is to provide a safe space for the coachee to reflect on current perspectives and behaviors, imagine new ways of being, try out new roles, and determine success.

Boysen-Rotelli (2021) defined coaching as “a transformational process where the coach is the catalyst, and the client gains awareness around solutions, answers, and shifts that will help them to achieve goals and reach a state of thriving” (p. 4). In the coaching relationship, the coach and coachee are equal partners in co-discovery, and ownership of the process and purposes belongs to the coachee (Bachkirova & Baker, 2019). The coach does not give expert advice or tell the coachee what they should do. A coach asks powerful questions to clarify the coachee’s dreams and what really matters to them and determine ways to overcome obstacles to accomplish those dreams.

In addition to a formal role, coaching can also be considered as a way of interacting with others to support self-awareness and build self-efficacy. This relational approach can be used in personal and professional interactions. The literature is clear that coaching skills are fundamental to all types of learning interactions and developmental relationships (European Mentoring & Coaching Council, n.d.).

Theoretical Roots of Coaching

Coaching practices are rooted in developmental psychology (Peltier, 2011). Many developmental frameworks are presented as *stage theory*, meaning the theory is organized into progressive stages. Kegan's Constructive Developmental theory is an example of stage theory. Peltier (2011) explained, "Developmentalists help us understand what we are doing and why we do it by examining the ways we grew and were forged" (p. 33). Two of the largest branches of developmental psychology are behaviorism and cognitivism.

Behaviorism

Behavioral approaches to coaching emerged from psychological research and theory. Behaviorists seek to understand human behavior. They consider personality to result from a person's interaction with their environment. Behaviorists are concerned with observable and measurable behaviors rather than thoughts or feelings. Today, behavioral theories are often considered outdated. However, the concepts and principles of behaviorism provide valuable insight into human behavior, learning, and change (Passmore, 2019; Peltier, 2011).

Behaviorism emerged in the early 20th century with Edward Thorndike's (1874-1949) Law of Effect, which states that if a desirable outcome follows a behavior, it is more likely that the behavior will be repeated (McLeod, 2018a). Around the same time, Russian psychologist Ivan Pavlov (1849-1936) developed the theory of classical conditioning with his famous dog and

metronome experiment. Pavlov found that a biologically powerful stimulus (e.g., the dog's food) paired with a neutral stimulus (e.g., the metronome clicking) will eventually cause a conditioned response. In the case of Pavlov's dog, the conditioned response was salivation. After a time, the dog would still salivate when the metronome clicked, even when food was not present. Thus, a neutral stimulus paired with an unconditional stimulus can trigger an involuntary or reflexive response.

Building on Pavlov's work, John Watson (1878-1958) argued that behavioral research should move away from Freud's preoccupation with internal concepts of ego and focus on what could be objectively measurable and observed (Peltier, 2011). Subsequently, B. F. Skinner developed the concept of operant or instrumental conditioning. A strict behaviorist, Skinner believed Pavlov's reflexive response was only a small part of human behavior. In his research, Skinner identified three types of responses that influence behavior: neutral operants, reinforcers, or punishers (McLeod, 2018b). Neutral environmental responses neither increase nor decrease the likelihood of a behavior being repeated. Reinforcers, which can be positive or negative, increase the probability of the behavior being repeated. For example, if a teacher praises a student's willingness to share their ideas in class, the student would be likelier to share ideas in the future (this example assumes teacher praise is a positive outcome). Punishers are environmental responses that weaken behavior. They decrease the probability that a behavior will be repeated. Punishment could be the absence of positive reinforcement (like not receiving a bonus at work) or the application of an unpleasant stimulus (such as being criticized in front of peers). Researchers caution careful use of punishment as it has been shown to cause aggression and fear. (McLeod, 2018b). Punishment aims to stop a behavior but does not necessarily indicate a suitable replacement.

Albert Bandura (Bandura & Walters, 1977) expanded behaviorism to include social learning. He thought Pavlov and Skinner's classical and operant conditioning was too simplistic. Bandura's reciprocal determinism theory states that an individual's personality (and subsequent behaviors) is formed and reformed due to ongoing interaction between the individual and their environment (Boeree, 2006). Later, he added a psychological aspect, noting a person's ability to be abstract and use language. In this way, he began to build a bridge to cognitivism. One of Bandura's significant contributions is the notion of self-efficacy, or a person's self-perception of performance. He posited that "people with high self-efficacy perform better as they are able to persevere longer without corresponding increases in stress" (Passmore, 2019, p, 100). In addition, Bandura argued that behavior could be influenced by observing the reinforcement contingencies or punishments of others. If we observe a friend trip on a set of stairs, we will navigate those stairs more carefully. Bandura's ideas of modeling and rehearsal connected strict behavioral theories to cognitive approaches to learning.

Behavioral theories form the foundation for most approaches to human development, education, organizational management, and business and marketing (Passmore, 2019; Peltier, 2011). Performance-based pay, bonuses, grades, award ceremonies, and token systems are all examples of using reinforcement or punishment. Behavioral approaches to coaching are structured and process-driven, using formal or informal assessments to identify values and motivation, set measurable goals, and define plans of action (Passmore, 2009; Peltier, 2011). For Peterson (2006), the critical question for a coachee is "What are you going to do differently?" (p. 51). His focus centers on the coachee's behavior and performance. Although behavioral coaches consider abstract concepts such as motivation, they are more concerned with how those concepts shape behavior. The approach aligns well with Western achievement ideas (Passmore, 2019).

The literature identified several defining characteristics of behavioral-based coaching: modeling, feedback, successive approximation, performance-based goal setting, gap analysis, action planning that considers successes and failures of self and others, use of competencies or standards to measure accomplishments, trying out actions, self-management, reinforcers, and practice (Passmore, 2019; Peltier, 2011; Peterson, 2006). While behavioral coaching is well-suited to help transform basic behaviors and performance, more complex problems involving emotions, beliefs, and feelings require a more robust model.

Cognitivism

Cognitive theory is interested in mental processes such as “memory, perception, language formation, and the roles of various brain functions” (Peltier, 2011, p. 120). It considers thinking as a type of behavior. Albert Ellis and Aaron Beck were early pioneers of cognitive therapy. Ellis studied “the relationship between conscious thought, emotion, behavior, and happiness” (Peltier, 2011, p. 120) and found that teaching patients new ways of thinking was more effective than traditional psychoanalytical approaches that only sought to uncover unconscious processes. Similarly, Beck educated clinically depressed patients to use new patterns of thinking (Peltier, 2011). He sought to disrupt repetitive patterns of thinking that he believed caused depression and anxiety.

The philosopher Immanuel Kant famously wrote a philosophical riddle: “*I see a tiger. I think I’m in danger. I feel afraid. I run*” (Peltier, 2011, p. 121). The simplicity of the riddle illuminates the relationship between antecedent behavior, perception, emotion, and subsequent action. A behaviorist would only be concerned with the tiger’s appearance and the resulting behavior (running). A cognitive perspective considers individual interpretation and feeling as causal. The thinking that causes the feeling is of most interest. Erroneous or undeveloped

thinking often leads to unwanted or unproductive decisions. The behaviorist perspective that the environment causes behavior can be unhelpful because most of our external experiences are out of our control. However, “humans are capable of observing their own thinking and are even capable of changing what they think” (Peltier, 2011, p. 122). As individuals learn to change ineffective thinking, they can better manage their actions and feelings. Although the idea was not initially well-received, Lloyd Homme’s description of covert operant was a landmark for cognitive perspectives (Peltier, 2011). Covert operants are conscious ideas that “could be treated in the same way as overt behaviors, that is, they could be observed, manipulated, and managed” (Peltier, 2011, p. 121). As a behavior, thoughts can be changed through traditional behavior techniques. This, along with Bandura’s work, created the cognitive behavioral approach.

Cognitive-Behavioral Coaching

People often get locked into unproductive ways of thinking and behaving. Cognitive-behavioral coaching (CBC) can help disrupt incorrect thinking by creating awareness and providing alternative information processing methods and resultant behavior, thus leading to varying levels of transformation. CBC is an approach to coaching that combines cognitive-behavioral principles with coaching techniques to help individuals achieve their goals and improve their overall well-being (Grant, 2017). The approach is based on the belief that the way individuals think and behave can have a significant impact on their emotions and experiences and that by changing their thinking and behavior patterns, individuals can achieve positive outcomes in their personal and professional lives. CBC helps people to make high-level, complex decisions about their work or life (Palmer & Szymanska, 2019). It is especially beneficial when people work in fields where the work is unpredictable.

According to Spence and Grant (2007), CBC involves several key elements, including goal setting, cognitive restructuring, behavior change, and skill development. In CBC, the coach works collaboratively with the client to identify specific goals and develop a plan for achieving them. The coach helps the client identify and challenge unhelpful thinking patterns and beliefs and develop more adaptive ways of thinking and behaving. The coach also helps the client develop new skills and behaviors to support their goal achievement. CBC is often used to address a range of personal and professional issues, such as stress management, time management, work-life balance, and interpersonal relationships. The approach is effective in improving a variety of outcomes, including well-being, job satisfaction, and performance (Grant, 2017). CBC moves people beyond knowledge transfer to learning how to act on principles and standards in a complex situation. Otherwise, people tend to revert to their most comfortable or habitual behaviors. One of the strengths of CBC is its evidence-based approach. Grounded in cognitive-behavioral theory, CBC has a strong empirical base and is effective in many settings (Spence & Grant, 2007). CBC also emphasizes the use of outcome measures to evaluate progress and effectiveness, which can help to ensure that coaching interventions are evidence-based and effective (Grant, 2017). Some tools used in CBC are polarity mapping (Emerson & Lewis, 2019; Johnson, 1992) and visualizing (Peltier, 2011).

Coaching as a Catalyst for Individual Transformation

Whether planned or unexpected, change is challenging to manage and sustain. The success of change efforts relies on the capacity for making behavioral or cognitive shifts. Humans manage life's challenges by creating neural pathways (Riddle, 2019). These pathways are created by habits and thinking, allowing us to respond efficiently to our environment. The more we use those pathways, the harder it is to make detours in our thinking. However,

sometimes, we must disrupt those patterns to create new ways of being. Coaches can provide both the disruptive stimulus and support needed for change. The coaching relationship generates new ideas beyond existing habits of mind through reflection and inquiry. As the coachee's perspective is enlarged, they can experiment with new plans of action and abandon unproductive ones. Coaching skills include "active listening and empathy, self-awareness, process observation, getting and giving feedback, conflict resolution, cognitive restructuring and learned optimism, [and] effective use of reinforcement" (Peltier, 2011, p. xxxi). The coachee can critically examine and reframe assumptions by making existing subconscious thinking more explicit. Thus, the relationship between the coach and the coaching client is a critical indicator of coaching success and "the active ingredient in coaching" (O'Broin & Palmer, 2019, p. 472). Carl Rogers stressed that congruence or genuineness is necessary for creating a relationship where growth can happen (Peltier, 2011). He described this congruence in two ways: first, as behaving in a way that is authentic to one's feelings or beliefs, and two, by accepting a person for who they are without judgment, which allows for the coach to create an atmosphere of safety (Rogers, 1957). O'Broin and Palmer (2019) stressed that the coaching relationship is central to achieving a meaningful outcome, noting that "studies have found significant associations between both coachee working alliance ratings and coaching outcomes" (p. 472). Because people learn and grow best in the context of supportive relationships, coaches must provide a safe environment for individuals to engage in conversations that challenge their thinking and behavior. Support involves providing emotional and practical support to the other person. This can involve providing encouragement, validation, and empathy, as well as helping the other person to identify and work towards their goals (Drago-Severson & Blum-DeStefano, 2014b; 2017). Trust is built through a combination of actions and attitudes, such as showing up

consistently, being transparent and authentic, and actively listening to the other person. Support also involves apologizing and making amends when mistakes are made.

Coaches ask explorative questions to clarify beliefs, values, and priorities. When responses are incongruent with behavior or espoused values, it is the responsibility of the coach to challenge the coachee (Peltier, 2011). Challenge involves pushing the other person to think deeply and critically about their assumptions and beliefs (Drago-Severson & Blum-DeStefano, 2014b; 2017). This can involve asking open-ended questions, providing feedback, and helping the other person to see things from a different perspective. The goal of challenge is not to criticize or judge, but rather to encourage growth and learning. Challenging can create new insights about the source of deeply ingrained behaviors or beliefs. Through this, new meaning is assigned. Fear and discomfort associated with confronting change can make people defensive. A coach facilitates movement through this discomfort by creating a psychologically safe space where the coachee does not experience condemnation (Kegan, 2000).

Coaching also supports transformation by partnering with the client to facilitate learning and awareness through reflection, action, and reflection on action (Schön, 1983). The iterative process of asking questions, listening, sharing information, pausing, and planning action in reflection builds partnerships. This partnership requires shared power around a common purpose and clarity about roles and responsibilities in the relationship. In the coaching partnership, ideas and viewpoints are exchanged, and action is planned collaboratively. Clarity in partnership roles establishes trust and “attitudes of respect, care, and acceptance” (Peltier, 2011, p.112). In a well-defined partnership, learning is facilitated by asking questions to understand the coachee’s perspective, exploring ideas, and, when needed, providing research-based resources or strategies. Reflection gives time for the coachee to make connections between ideas and space for increased

self-awareness. Effective coaches make space for reflection by practicing pauses. Asking meaningful questions is only worthwhile if the coachee is given sufficient time to ponder and collect their thoughts.

Another essential coaching skill for transformation is active listening. Coaches use active listening to understand the coachee's perspective. There are many ways to listen actively. One way is to listen to identify underlying emotions. Boysen-Rotelli (2021) explained, "Active Listening is listening not just for the client's words, but for what is not being spoken, as well as the energy/emotion behind the words" (p.11). When frustrated, underlying emotions can be manifest by a diatribe that, on the surface, seems unconnected to the genuine concern. The coaches can mitigate this by synthesizing themes and asking clarifying questions to help the coachee focus and articulate feelings and thoughts. Another way to use active listening is to listen for repeated words or themes. Laura Bierema (n.d.) often said the words people say are the gifts that keep giving (personal communication). When a coachee repeatedly uses a particular word or theme, they tell you what is important to them. Pulling at the thread of these words or themes can provide a shortcut to understanding. Active listening requires the coach's full presence. Presence involves being fully present in the moment and focusing on the other person (Drago-Severson & Blum-DeStefano, 2014b; 2017). This means setting aside distractions and actively listening to the other person's words and non-verbal cues. Presence also involves being open and curious, and avoiding making assumptions or jumping to conclusions.

Additionally, effective coaches consider the coachee the expert on their experience and needs. The client (or coachee) is the authority on their life and associated goals, aligning with the constructivist view that learning and knowledge are individually constructed based on current and past experiences (Elliott et al., 2000; Fox, 2001; Phillips, 1995). Michael Polanyi (2009)

famously wrote, “We can know more than we can tell” (p. 4). This statement provides a framework for what I call humble credibility. First, the statement implies that enormous depths of tacit knowledge reside within every person. In addition, the statement indicates that personal knowledge can expand. King and Eaton (1999) assert, “A good coach must believe unequivocally in the potential of the individual and operate on the assumption that the person receiving coaching is the real expert about themselves and their work” (p. 146). Humility allows the coach to “adopt [sic] the client’s internal frame of reference” and “provide clients with the opportunity...to be really listened to and accurately heard” (Peltier, 2011, p. 112). In most circumstances, solutions reside within the same individual who seeks to address a problem or make an improvement.

Palmer and Whybrow (2006) asserted that the purpose of coaching is “enhancing well-being and performance in personal life and work domains underpinned by models of coaching grounded in established adult learning or psychological approaches” (p. 8). Coaching is a tool for growth and transformation that can be applied in many contexts.

Coaching Empirical Findings and Limitations

In a review of five empirical studies outlined in Table 2.2, coaching within professional development systems has been found to support coachee growth and transformation (Anthony & van Nieuwerburgh, 2018; Douglas et al., 2020; Grant et al., 2009; Lyons & Bandura, 2021; Reams & Reams, 2015). Three studies indicated that prior experience and frames of thinking are the most influential factors in coaching outcomes (Anthony & van Nieuwerburgh, 2018; Grant et al., 2009; Reams & Reams, 2015). Others emphasized the importance of partnership, reflection, and feedback (Douglas et al., 2020; Lyons & Bandura, 2021; Reams & Reams, 2015). Positive outcomes associated with coaching included increased individual growth, resilience, goal

attainment, and well-being (Anthony & van Nieuwerburgh, 2018; Douglas et al., 2020; Grant et al., 2009).

However, several limitations are noted. First, individuals unfamiliar with working with ambiguity and complexity are reluctant to engage in a coaching relationship (Reams & Reams, 2015). These individuals expressed discomfort with exploring emotions in a professional realm. It takes time to build trusting relationships and move coachees out of their comfort zone (Douglas et al., 2020). Anthony and van Nieuwerburgh (2018) noted that this pace of change can be frustrating to both the coach and coachee. Coaching requires stamina to endure the transformation process. Relatedly, Grant et al. (2009) found that short-term coaching relationships showed no difference in stress levels with comparative cohorts, but longer-term coaching reduced stress. Another limitation is that coaching is less productive when either the coach or coachee lacks self-efficacy (Anthony & van Nieuwerburgh, 2018; Lyons & Bandura, 2021) or when the coachee struggles with mental well-being (Douglas et al., 2020). While not critical, Lyons and Bandura (2021) found that having existing standards or competencies in a professional development system supports planning, observation, and growth. Reams & Reams (2015) identified two of the most interesting limitations. First, coachees can see the coaching process as a threat to long-held beliefs and behaviors. The loss of identity can prevent full engagement. Reams and Reams (2015) also found that a critical element to transformation is some level of resistance to the desired state of change. Coachees struggled to take the process seriously without that resistance to disoriented thinking.

Table 2.2*Summary of Empirical Literature Review*

Study	Method/Sample	Research Question	Findings	Coaching Limitations
Anthony & van Nieuwerburgh (2018)	Qualitative phenomenological study using grounded theory; 20 headteachers and deputy headteachers in UK	How can coaching have a positive impact on pupil learning and outcomes?	Prior experience and beliefs are main influences; coaching generates growth	Pace of change can frustrate coach and coachees; self-efficacy required of both coach and coachee
Douglas et al. (2020)	Mixed methods using surveys, interviews, coaching logs; 19 early intervention providers in Midwest state in the U.S.	Do provider perceptions of coaching practices align with reported practices? What benefits and barriers do providers note in coaching?	Joint planning, reflection, and feedback strengthens coaching relationship; observation and action provide data for coaches	Difficult to get coachees out of comfort zone; attitudes at onset related to outcomes; coachee's cognitive ability and mental well-being influences success
Grant et al. (2009)	Qualitative randomized control; 41 Australian health executives	Can executive coaching be effective?	Coaching sessions increased resilience, goal-attainment, and well-being	Coaching had no impact on stress levels in short-term coaching experiences
Lyons & Bandura (2021)	Experimental mixed method; managers and coaches in an organization	What are research grounded tools for coaching?	Use of an action plan serve learning and information needs of coach and coachee	Action plans work best when work in conjunction with standards; self-perception critical ingredient for success
Ream & Ream (2015)	Qualitative study using 360 feedback, surveys, interviews; 350 participants in a leadership development program	How can coaches use of the Immunity to Change (ITC) process to support awareness and transformational learning?	Coaching using ITC helps coachees move from socialized mind towards self-authoring mind	Coachees' prior ontology influences openness to coaching; loss of identity seen as threat; some level of resistance needed for growth

Intersection of Professional Development, Adult Learning, and Coaching

In the following table, labeled Table 2.3, the intersection between adult learning principles, professional development activities, and coaching approaches is elucidated. Adult learning and coaching principles disrupt the idea that learning is a time-limited activity disconnected from everyday realities. For PD to affect lasting change in an individual's beliefs, actions, or performance, the design must both challenge and support the learner. Vygotsky (1978a) taught that optimal learning happens within a *zone of proximal development (ZPD)* where learners are challenged just beyond their current knowledge and skill. Additionally, he stressed that learning is enhanced in collaboration with peers. A coaching approach assumes the learner to be “a mature, motivated, voluntary, and equal participant in a learning relationship with a facilitator whose role is to aid the learner in the achievement of his or her primarily self-determined learning objectives” (Cox, 2006, p. 195). Adult learning principles implemented in PD programs using a coaching approach help to leverage the ZPD and provide opportunities for social learning with the coach, peers, or other experts. Coaching is about helping someone become the best version of themselves. In PD, that means aiding the learner in developing new skills, understandings, and ways of being to increase performance in authentic ways.

Table 2.3*Alignments Between Adult Learning Principles, PD Strategies, and Coaching*

Adult Learning Principle	PD Strategies	Coaching Approach
Self-directed	<ul style="list-style-type: none"> • Flipped learning • Multi-model resources/tools (video, audio, text-based, experiential) • Varying levels of support • Learner chooses goals 	<ul style="list-style-type: none"> • Coach facilitates, learner directs • Learner determines how and what feedback is shared • Coach refrains from advice-giving • Learner is expert on their learning
Prior experience influences learning	<ul style="list-style-type: none"> • Reflective journaling • Video-recording for self-observation 	Challenge assumptions Increase self-awareness
Readiness to learn oriented to situation and social roles	<ul style="list-style-type: none"> • Badging, certification • Clarity of learning objectives/rationale 	Learner is expert on their context Coach seeks to understand coachee perspective
Problem-solving, goal orientation	<ul style="list-style-type: none"> • Planning for action • Experimentation • Clear learning objectives 	Inquiry to uncover real problem Action orientation
Learn best in real-world context	Use of relevant data for calibration	Inquiry into environment and context
Tend to be more intrinsically motivated	Flexible, responsive learning plan	Formal and informal assessments to uncover values and beliefs
Social interaction supports new ideas	Communities of practice Connection to human and material resources	<ul style="list-style-type: none"> • Connection to experts/mentors • Specific and constructive feedback

What Makes Learning Transformational and How Do We Know

Since Socrates, philosophers and scholars have grappled with questions about knowledge and the nature of learning. Educators in adult learning use a “mosaic of theories, models, sets of principles, and explanations” (Merriam, 2001, p. 3) to describe how learning happens and why it matters. Within this andragogical mosaic, transformation and transformative learning descriptions often take center stage (Brookfield, 1995; Cranton, 1994; Henderson, 2002; Kegan,

2000; Marsick et al., 2014; Simsek, 2012). However, less attention is paid to the form that transforms.

Transformative Learning

Transformative learning is a concept that describes the process of personal growth and transformation that individuals experience through critical reflection and analysis of their own beliefs, values, and assumptions (Mezirow, 1991). Transformation is considered important for several reasons. First, transformative learning can lead to a deeper, more meaningful understanding of oneself and the world. By challenging existing assumptions and beliefs, individuals can develop new perspectives and insights that allow them to better navigate complex and changing environments. Second, transformative learning can lead to personal growth and development. By engaging in critical reflection and introspection, individuals can develop greater self-awareness and self-understanding and identify areas for growth and improvement. Third, transformative learning can lead to social and political change. By challenging existing power structures and questioning social norms and values, individuals can become more empowered and active agents of change in their communities and beyond. Fourth, transformative learning can promote lifelong learning and ongoing personal and professional development. Individuals can remain adaptable and resilient in the face of changing circumstances by developing a growth mindset and a commitment to ongoing learning and self-improvement. Transformative Learning Theory (TLT) was developed by Jack Mezirow in the 1970s and has since been expanded upon by other scholars. According to Mezirow, transformative learning occurs when an individual encounters a new experience or information that challenges their existing beliefs or assumptions (Mezirow, 1991). This experience creates a sense of cognitive dissonance, prompting the individual to reevaluate their beliefs and

assumptions to accommodate the new information. Through this process of critical reflection and analysis, individuals can revise their beliefs and assumptions, leading to a shift in their perspective and, ultimately, transformative growth.

Transformative learning can occur in a variety of contexts, including formal education, workplace training, and personal experiences. It has been shown to have a range of positive outcomes, including increased self-awareness, greater empathy and understanding of others, and increased ability to navigate complex social issues and challenges (Baumgartner, 2001; Cranton, 1994; Daloz, 2003; Dirkx, 2001; Drago-Severson & Blum-DeStefano, 2014a; Healy, 2000; Hoggan, 2016; Kegan, 1998; Kegan, 2000; Merriam, 2004; Mezirow, 1991, 1993, 1997, 2000; Simsek, 2012; Taylor, 2007; Tisdell, 2020). The roots of TLT are found in the work of Brazilian educator Paulo Freire. Freire (1974) used the term *conscientisation* to describe critical awareness of reality beyond simple consciousness of existence. Conscientisation requires “probing the ambience of reality” (Freire, 1974, p. 25) as epistemological action, such as analysis and inquiry into political, cultural, and social contexts. Freire (1974; Friere & Ramos, 2009) believed this critical awareness was transformative for personal liberty and social emancipation. Dirkx (1998) explained, “Critical consciousness refers to a process in which learners develop the ability to analyze, pose questions, and take action on the social, political, cultural, and economic contexts that influence and shape their lives” (p. 3). As learners question societal structures, they become more aware of inequities and how they participate in those structures. With increased awareness, learners can name and challenge discriminatory practices and move toward emancipation.

Mezirow (1993) developed TLT as a formal theory based on a study of adult women returning to higher education after an extended period out of school. Mezirow examined characteristics that inhibit or enable learning. He found that transformative learning occurs when

meaning schemes or habits of mind are transformed, resulting in a change of beliefs or behavior. Mezirow's (2000) meaning schemes refer to the beliefs, assumptions, and related emotions that shape how individuals interpret the world. This transformation meets the essential purpose of adult learning, which is to develop the ability "to understand the meaning of life experience and critically interpret it accordingly on the basis of personal understanding" (Kolbergýtè, 2014, p. 650).

In his theory, Mezirow (1997) distinguished two types of learning: instrumental and communicative. These are also known, respectively, as "objective" and "subjective reframing" (Mezirow, 2000, p. 23). Instrumental learning is associated with problem-solving and cause and effect. This objective reframing involves critically reflecting on the assumptions of others when engaged in task-oriented problem-solving. Conversely, subjective reframing happens when the learner reflects on the assumptions of others in relation to a narrative, system, organization, or relationship. Subjective reframing is more challenging as it involves emotions, feelings, and beliefs (Mezirow, 1991) and considers humans' complex and incongruous nature.

Mezirow (1991) identified ten non-linear phases of transformative learning: a disorienting dilemma, self-examination, critical assessment, recognition of shared experiences, exploring options for new behavior, planning a course of action, acquisition of knowledge, trying new roles, building confidence, and reintegration. According to TL theory (Mezirow, 1985, 1991, 2000), transformative learning is triggered by disorienting dilemmas or crises that challenge an individual's assumptions and beliefs. The dilemma is "an activating event that typically exposes a discrepancy between what a person has always assumed to be true and what has just been experienced, heard or read" (Cranton, 2002, p. 66). Paul (2014) contended that transformation can be catalyzed by encounters with other people, nature, or even art. A dilemma

requires reflecting on the previous belief and considering why the assumption has been held as truth.

Disorientation creates a sense of cognitive dissonance or confusion, prompting individuals to reflect critically and reevaluate their beliefs and assumptions. Individuals may seek out new information, examine their experiences, and consider alternative perspectives to make sense of the new information. Critical reflection aids in “assessing their validity in the light of new experiences of knowledge, considering their sources, and examining underlying premise” (Cranton, 2002, p. 65). Such self-examination generally creates a sense of discomfort or disequilibrium. Working through the discomfort is a critical part of transformation. This process may involve seeking out new sources of information, engaging in dialogue with others, and evaluating the evidence from different perspectives.

Through this critical assessment, individuals become more aware of their underlying assumptions and how they influence their beliefs and actions. Increased awareness of their assumptions leads to exploring new perspectives and ways of thinking. As they explore, they may seek out alternative viewpoints and engage in dialogue with others to gain a more nuanced understanding of the issues at hand. In transformative learning, critical reflection and self-examination help individuals realize that struggles and challenges are universal to the human experience. The experiences and actions of others provide data about potential roles and actions to try out. New knowledge may take academic, social, or exploratory forms. As a result, “the learner must search for alignment by re-engaging in experiential knowing, located in feeling and emotion, intuition and imagery” (Yorks & Kasl, 2002, p. 183). Trial and error lead to the adoption and integration of a new perspective. Individuals integrate their new understanding into their beliefs and actions, resulting in a transformed perspective and personal growth.

Transformation involves engaging with the uncertainty and ambiguity of the moment and developing new meanings and perspectives (Berger, 2004). These experiences can be positive or negative and may involve uncertainty or excitement. Transformation has powerful potential to either deepen or end social relationships and threaten one's identity (Berger, 2004; Paul, 2014), requiring the individual to prepare their environment and psyche by being open, curious, and willing to explore new ideas or perspectives. Transformative learning requires individuals to be open to new experiences and perspectives, critically reflect and analyze, and revise their beliefs and assumptions in response to new information. It is a challenging process that can lead to significant personal growth and transformation.

Transformational Learning: Constructive Developmental Theory

Robert Kegan considered Mezirow's TL theory too cognitively focused (Teachers College, 2015). A psychologist and Harvard professor, Kegan has studied stages of adult development for over thirty years. When Kegan began his post-secondary studies, Jean Piaget's developmental stages formed the foundation for many social science programs of study. Kegan marveled that Piaget's stages of development essentially stopped in early adulthood (Fuller, 2019). However, Kegan's work has shown that development continues throughout life, albeit slower in adulthood. His Neo-Piagetian work is known as Constructive Developmental theory and informs transformational approaches to learning (Drago-Severson & Blum-DeStefano, 2014a). It considers transformation a process of lifelong learning.

Kegan (1980, 1998, 2000) expanded on Piaget and Mezirow's work by identifying five *orders of conscience*, or stages of development. The orders contend two things: one, development continues well beyond the early formation of identity, and two, higher stages of adult maturation allow for more complex transformative growth. These stages help educators

understand how learners make sense of their world. Constructive Developmental theory is based on principles of constructivism, developmentalism, and subject-object balance (Kegan, 1984). The constructivist perspective argues that the learner constructs reality and learning. Every experience and interaction are, consciously or unconsciously, interpreted and assigned meaning. How we construct reality involves “cognitive, affective, intrapersonal..., and interpersonal lines of development” (Drago-Severson & Blum-DeStefano, 2014a, p. 116). Developmentalism posits that the way a person constructs reality becomes more complex over time. In Constructive Developmental theory, how people construct their reality depends on their developmental maturity (Kegan, 2000). Using more complex forms of perspective-taking, self-awareness, and self-regulation to construct reality allows for more complex transformation.

Subject-Object Relationship

Kegan’s (1980, 2000) theory centers on a subject/object framework. The subject refers to an individual’s sense of self or identity, while the object refers to the external world, including other people and objects. How one perceives subject and object is contingent on their development level and significantly impacts how experiences are processed. Kegan (2000) stated that our way of knowing “always consists of a relationship or temporary equilibrium between the subject and object in one’s knowing” (p.53). The object represents what can be seen, reflected upon, controlled, or integrated. The subject is what is identified with or what is part of something else. Object “describes the thoughts and feelings we say we have...subject describes the thinking and feeling that has us” (Kegan, 2000, p. 53).

As adults mature, the relationship between subject and object slowly shifts. Forms of knowing become more complex and inclusive as we move from a place of subjection to something (e.g., an idea, a belief) and come to a place where we are in relationship with it. The

subject-object change is not a simple shift from one opinion or belief to another. Transformation requires one to become critically aware of the external sources that form our identity and “question or weigh the validity of these ideas” (Kegan, 2000, p. 54). Constructive developmental theory is not a theory of teaching (Teachers College, 2015). However, its usefulness in education is in creating awareness that adults continue to develop and have the possibility for transformation throughout adulthood.

Importantly, Kegan (2000) clarified that a transformation in the subject-object relationship does not inherently require a change in beliefs. Instead, it is the form of knowing that has transformed. The evolution happens over time in a series of episodic, lesser transformations. In the progression, a “further stage does not replace the previous one but incorporates it and transforms it into a qualitatively different experience” (Eriksen, 2006, p. 291). Kegan (1998) illustrated the progression using a geometric metaphor, starting first as a dot, then a line, and finally, a more complex shape on a plane.

Overall, the subject-object relationship in Kegan’s theory highlights the importance of understanding how individuals perceive themselves and the world around them and how this perception evolves over time. By understanding the subject-object relationship, individuals can gain insight into their own cognitive and emotional development and work towards greater self-awareness and personal growth.

Orders of Consciousness

A transformation from one order of consciousness requires changing what is subject and what is object. Kegan’s (1980, 1998, 2000) stages of consciousness are (0) incorporative balance, (1) impulsive balance, (2) imperial balance, (3) interpersonal balance, (4) institutional

balance, and (5) interindividual balance. Table 2.4 shows the subject-object relationships in Kegan's (1980) stages.

Table 2.4

Kegan's (1980, 1998, 2000) Orders of Consciousness

Stage	Approximate Age	Subject	Object	Characteristics
Stage 0 Incorporative	0-2 years	Reflexes (sensing, moving)	None	Wholly dependent on external care; action results from outward stimulus
Stage 1 Impulsive	2-7 years	Impulses, perceptions	Reflexes (sensing, moving)	Impulsive; needs frequent reminders of rules
Stage 2 Imperial	7 years-late adolescence/ early childhood	Need, interests, wishes	Impulses, perceptions	Relationships are transactional; structure seeking; limited ability to consider others' perspectives
Stage 3 Interpersonal <i>The Socialized Mind</i>	About 58% of adults (Kegan & Lahey, 2009)	The interpersonal mutuality	Need, interests, wishes	Oriented to society or tribe; able to set goals, plan, and reflect on actions; considers others' perspectives
Stage 4 Institutional <i>The Self-Authoring Mind</i>	Some adults in middle age	Authorship, identity, psychic administra- tion, ideology	The interpersonal mutuality	Self-authored values and epistemological frameworks; self-directed, self-evaluative
Stage 5 Inter- Individual <i>The Self-Transforming Mind</i>	Very few adults, 60+ years old	Individuality, inter- penetrability of self- systems	Authorship, identity, psychic administra- tion, ideology	Self-awareness of values and epistemological frameworks; able to simultaneously hold multiple, potentially conflicting perspectives

The "stages do not differentiate among the content of people's experiences or how they do things but among the principles by which they construct and organize their thinking, feeling,

and social relating” (Eriksen, 2006, p. 291). The first three developmental stages happen in childhood. Incorporative balance covers the child’s first 18 months, where experiences are composed of reflexes, sensing, and moving. In this stage, individuals have no sense of self beyond their environment. As the child transitions into impulsive balance, they become aware of others and are subject to impulses and perceptions. Around their eighth year, in the imperial balance, children begin to understand otherness or that others have perspectives different than the child’s own. During this time, “children are subject to their needs, wishes, and interests, while they are able to make their impulses and perceptions object” (Eriksen, 2006, p. 292). Imperial stage individuals see themselves as the center of their world, and everything else as an object to be controlled or manipulated. This stage lasts until late adolescence or early adulthood.

Kegan’s last three stages—interpersonal, institutional, and interindividual balances—are most relevant to adult learning and development. Kegan and Lahey (2009) call these stages “adult meaning systems—the socialized mind, self-authoring mind, and self-transforming mind” (chapter 1, *Three Plateaus in Adult Mental Complexity* section, para. 2). Kegan (2000) compares these stages to eras of traditionalism, modernism, and post-modernism. The interpersonal balance stage begins around age 20. Adults spend most of their lives in this order of consciousness (Eriksen, 2006; Kegan & Lahey, 2010). As individuals develop, they gain a more complex understanding of the world and begin to recognize the interdependence between themselves and others. In this stage, the socialized mind is “shaped by the definitions and expectations of [the] interpersonal environment” (Kegan & Lahey, 2010, p. 436). The socialized mind manages its own needs in consideration of others’ perspectives. The individual sees themselves as part of a more extensive social system and recognizes the importance of relationships with others. The condition is expressed in the “construction of reciprocal relations

of co-owned obligation and expectation” (Kegan et al., 1982, p. 113). Environment and culture are at the core of this stage. Beliefs, perspectives, and behaviors are subject to societal norms. While this allows the person to function well within a community, their identity is determined by the opinions of others. Authority is an object, and the socialized mind is subject to it.

In the institutional balance stage, the mind becomes self-authoring and can critically reflect on the environment and culture to form independent beliefs outside societal expectations. Institutional stage individuals can reflect on their assumptions and beliefs and develop a more nuanced and complex understanding of the world. They began to recognize the importance of diverse perspectives. Living in this level of complexity, individuals become the authors of their identity (Kegan, 2000; Kegan & Lahey, 2009), determining personal authority for judging experiences and creating expectations. Those with a self-authoring mindset have a larger, more complex perspective for making sense of the world. Adults in this stage use a self-created filter to determine what messages it will allow in and prioritize “receiving the information it has sought” (Kegan & Lahey, 2009, Chapter 1, *Three Plateaus in Adult Mental Complexity* section, para. 9). Individuals in this stage may be unlikely to receive information that conflicts with their self-authored belief system.

Very few adults achieve Kegan’s (1998) fifth stage of development, interindividual balance or the self-transforming mind. Like the self-authoring mind, the self-transforming mind also filters information. However, “it can stand back from its own filter and look *at* [emphasis added] it, not just *through* [emphasis added] it” (Kegan & Lahey, 2010, p. 437). The self-transforming mind lives in the duality of valuing one way of interpretation and recognizing that the interpretation is likely incomplete. It embraces the fluidity of knowledge. What may be known today may evolve and shift in the coming days. The self-transforming mind constantly

searches for and integrates new knowledge and ways of knowing to “enhance, refine, or make more inclusive the original design” (Kegan & Lahey, 2010, p. 437). Adults with a self-transforming mind can hold multiple conflicting ideas simultaneously.

Research on Transformation Continues

TLT has significantly influenced adult education practice and research. Taylor (2007) declared, “With the growing interest in the practice of fostering transformative learning, it seems to have replaced andragogy as the iconic educational philosophy of the field” (p. 189). Additionally, the influence of TLT has expanded well beyond adult learning to medicine, business, and other fields. Despite its ubiquitous nature, there is still much to learn. Scholars and practitioners continue to build on Mezirow's work and push the boundaries of his original ideas, including Baumgartner (2001), Daloz (2003), Dirkx (1998, 2001), Healy (2000), Hogan (2016), Kegan (1998, 2000), O’Sullivan (1999), Paul (2014, 2017), and Tisdell (2020).

Paul (2014) used a philosophical lens to examine transformation. In her view, experiences can either change epistemology or ontology; having one experience does not require the occurrence of the other. Paul (2014) defined transformative experience as “the sorts of experiences that are both epistemically and personally transformative” (p. 17). These experiences involve a profound shift in our relationship with ourselves and the world. Furthermore, Paul contended that humans cannot use rational choice in the pursuit of transformation.

Daloz (2003) believed transformation happens as new meanings from a changing world are constructed and integrated into personality. Taylor focused on rational, emotional, and spiritual aspects and saw transformation as holistic (Kolberg, 2014). O’Sullivan (1999) also took a holistic perspective but from a cosmic perspective. He asserted that educators are responsible for preparing students for the future by critically examining the relationship between

the universe and humanity's place in it. Dirkx (1998) proposed that transformative learning is an ongoing, iterative process of examining individual human nature, identity, and morality. Other scholars include Ted Fleming (experience and recognition), Lyle Yorks (collaboration and knowledge transfer), Victoria Marsick (informal and incidental learning), Aiki Nicolaides (complexity and ambiguity), and Robert Kegan (stages of development). However, despite the substantial number of empirical studies on transformative learning, research has been primarily qualitative and focused on individual case studies or small samples, making it difficult to draw generalizable conclusions (Taylor, 2007).

Ultimately, transformative experiences can help individuals to discover new possibilities for themselves and their lives and to develop a more profound social connection to others and the world around them. Practices such as mindfulness, meditation, and journaling can be valuable for individuals seeking to cultivate the mindset necessary for transformation.

The Form That Transforms

A quick Google Scholar search for *transformative learning* produces more than a million results. The notion has inspired numerous books, journal articles, conferences, and lesson plans. Clearly, scholars and practitioners are interested in transformation through learning. But what form do educators aim to transform? As shown in Table 2.5, the literature has answered this in many ways. Several scholars have asserted the form that transforms is the learners' capacity for self-direction (Brockett & Hiemstra, 1991; Ellinger, 2004; Grow, 1991; Knowles, 1975; Loeng, 2020). Knowles (1975) believed educators' use of self-directed approaches perpetuated increased learner independence and described this as the power to transform "the ability to learn on one's own" (p. 19). Learners take increasing responsibility for inner cognitive processes as they negotiate unique ways of knowing. Other scholars have pointed to awareness of self and

meaning-making as the forms of transformation (Brookfield, 1995, 2009; Ellinger, 2004; Garrison, 1992, 1997). They argued that critical reflection, or critical thinking, leads to metacognition. Metacognition is a person's awareness of what they know (or do not know) and the cognitive processes they use for learning and problem-solving. Metacognition increases as individuals apply existing knowledge to create a learning plan, reflect on the results, and plan for future action. In essence, TL creates the conditions where individuals learn how to learn (Garrison, 1997). Similarly, Gunnlaugson (2011) and Kegan (1994, 2000) asserted that the form that transforms is our ways of knowing.

Table 2.5

The Form That Transforms

Author(s)	Form
Brockett & Hiemstra (1991); Ellinger (2004); Grow (1991); Knowles (1975); Loeng (2020)	Capacity for an orientation towards self-directed learning
Brookfield (1995, 2009); Garrison (1992, 1997); Ellinger (2004); Paul (2014)	Awareness of meaning and self-knowledge
Dirkx (1998, 2001)	Soul
Freire (1974); Garrison, 1997	Social action identity
Gunnlaugson (2011); Kegan (1998, 2000); Paul (2014)	Ways of knowing, capacity for complexity in perspective taking (holistic)
Healy (2000); Tisdell (2008; 2020); Tisdell & Tolliver (2003)	Spirit
Heron (1990; 1992)	Whole Person (holistic)
Houle (1974); Tough (1978); Vygotsky (1978a; 1978b)	Cognitive skills
Merriam (2004)	Values, beliefs, assumptions (holistic)
Mezirow (1978, 1985)	Frames of reference, perspective
O'Sullivan (1999)	Planetary consciousness
Taylor (Kolbergýté et al., 2014)	Spiritual, rational, emotional self (holistic)

Freire (1974) considered a person's social action identity as the form that transforms. He considered transformation to be a tool for liberation from oppression. TL learning approaches support the development of critical awareness by raising questions about social and economic structures. For this transformation to happen, learners must become cognizant of the "modes through which certain social structures form and influence people's thinking about themselves and the world" (Kolberg et al., 2014, p. 650). This view prioritizes social change and democracy, "increasing one's capacity for personal emancipation, empowerment, and self-efficacy" (Nicolaidis & Dzubinski, 2016, p. 123).

Some scholars have criticized Mezirow's TL theory as too centered on rationality and consciousness (Dirkx, 1998, 2001; Healy, 2000). Others have contended that TL transforms the human spirit (Healy, 2000; Tisdell, 2008, 2020; Tisdell & Tolliver, 2003). Distinct from organized religious practices, the literature considers spirituality to be "about an individual's personal experience with the sacred, which can be experienced anywhere" (Tisdell, 2008, p. 28). Similarly, Dirkx (1998) considered TL to be "soul work" (p. 15), where learners work to name and explore assigned meanings and internally generated images consciously. He explained, "Those who take seriously the 'transformative' in transformative learning are interested in a 'deep' learning that challenges existing, taken-for-granted assumption, notions, and meaning of what learning is about" (p. 4).

Mezirow (2000) considered TL "as learning that transforms problematic frames of reference to make them more inclusive, discriminating, reflective, open, and emotionally able to change" (p. 22). Thus, for him, the form that transforms are frames of reference, or habits of mind and points of view. Habits of mind are the "broad dispositions people use to interpret events" (Nicolaidis & Dzubinski, 2016, p. 122). Points of view are the meaning schemes that

inform the habits of the mind (Mezirow, 2000). Today, many scholars refer to Mezirow's TL work as perspective transformation theory (Teachers College, 2015). Some critics believed Mezirow's theory, as initially written, was too individualistic and focused only on cognitive processes (Kegan, 2000; Fuller, 2019; Teachers College, 2015) and argued transformation must be holistic (Heron, 1990, 1992; Kegan, 2000; Kolberg et al., 2014; Merriam, 2004). They believed transformation requires a paradigm shift that includes emotional, rational, and spiritual dimensions. Daloz (2003) considered this to be personal development. His research demonstrated that learners "negotiate developmental transitions and are changed in the process" (Baumgartner, 2001, p. 17). While we may assign labels to various aspects of human existence (e.g., perception, experience, belief, emotion), the individual parts are inseparable and interdependent.

Heron (1990, 1992) described the holistic form as the whole person. The parts of the whole person do not transform equally or simultaneously. However, the whole person must be part of any significant shift in ontology and epistemology. The various "parts" are all involved in the process and have a role in transformation. Heron (1992) defined four modes that function together to represent the whole person as a seamless whole, an interacting system which in simplified form has four psychological modes of being" (p. 17): affective, imaginal, conceptual, and practical. These modes describe how the whole person receives information, experiences events, and interacts with the world. Each mode is inseparable from the others and works in tandem to guide ways of knowing and being. Each mode includes an individual and social polarity. Rather than being distinct, Heron (1992) describes the poles as intertwined and interdependent. The individuating pole represents the interaction processes between various aspects of one's psyche. Conversely, the participatory pole embodies "unitive interaction with a

whole field of being” (Heron, 1992, p. 15). The whole person perspective of transformative learning aligns with Keegan’s (2000) assertion that transformative learning “attends to the deliberate efforts and designs that support changes in the learner’s form of knowing” (p. 53). The resulting new frame of reference compels the learner to conceptualize and move into action. Transformative learning is a holistic process that can only be realized through the interplay of affect, imagination, cognition, and action. The whole person can be studied in parts. However, there can only be transformation of the parts with the involvement of the whole form.

Theoretical and Empirical Recommendations for Transformative Learning

In addition to the theoretical literature, I reviewed five empirical studies that explore transformative learning experiences. I chose studies that collected narrative and descriptive data from participants and identified recommendations for sustained learning. Table 2.6 outlines the research questions, approaches to learning, and recommended strategies. This section will also explore how the studies measured participant transformation and how their recommendations align with theoretical foundations. In all the studies, transformation was measured through qualitative participant interviews. Brooks and Adams (2015) and Kitchenham (2010) also used reflective journal entries. Pearson et al. (2022) added a quantitative component using distributed surveys. The researchers found that transformational and self-directed learning approaches effectively support individual transformation. Participants discovered new ways to look at complex problems and consider diverse approaches to solving those problems. They increased critical thinking skills, challenged assumptions, and used reflection to reframe thinking and redesign action. A teacher in Brooks and Adams’ (2015) study explained:

Our school change project impacted me greatly. I think I experienced the most influential night as an educator last Thursday . . . when I went on my very first home visits. I would

never have had the guts or drive to do this if it weren't for [this project]. The support...was just what I needed to get me out of my comfort zone. (p. 301)

In Pearson et al.'s (2022) study, a village representative described a transformation in their ways of being:

When I used to stay at home I was very shy and used to hesitate in interacting with other people but now I feel I have changed so much that I stepped out of my house, met people and got a chance to interact with people. (p. 11)

The following strategies were found to be most influential in participants' transformation (in order of frequency reported): social interaction (5), critical reflection (5), application (5), cognitive dissonance (3), and growth plans (3). These findings clearly align with Knowles' (1970, 1980, 1984) andragogical principles and theories of transformation (Kegan, 1980, 1998, 2000; Mezirow, 1978, 1985, 1991, 1993, 1997, 2000; Paul, 2014).

Table 2.6

Empirical Studies Using Transformative Learning Approaches

Study	Method/ Design	Sample	Research Questions	Findings for Sustained Learning
Brooks & Adams (2015)	Qualitative/ interviews	162 secondary educators from four partnership school districts	How does graduate coursework through university-school partnerships create space for teachers' critical self-reflection, change in professional practices, and sense of agency?	<ul style="list-style-type: none"> • Social interaction • Critical reflection • Application/experience • Growth plan
Kitchenham (2010)	Mixed method/ interviews, document review	3 principals, 44 teachers at 3 elementary schools	How do teachers experience perspective transformations due to development? Which external factors influenced perspective transformation occurrences?	<ul style="list-style-type: none"> • Social interaction • Critical reflection • Cognitive dissonance • Application/experience • Growth plan

Study	Method/ Design	Sample	Research Questions	Findings for Sustained Learning
Nicolaides & Dzubinski (2016)	Action inquiry/ interviews, focus groups	Unspecified number of students and professors at a university	How does adult education help adults, organizations, and society function effectively in 21st-century life?	<ul style="list-style-type: none"> • Social interaction • Critical reflection • Cognitive dissonance • Application/experience
Pearson et al. (2022)	Mixed methods/ interviews, document analysis	12 leaders, 10 trainers, 4 coaches, 20 village representatives	What are the learning experiences at all levels of training?	<ul style="list-style-type: none"> • Social interaction • Critical reflection • Application/experience • Growth plan
Prosek & Michel (2016)	Qualitative inquiry/ interviews, observations	13 master's-level counseling trainees	What were the lived experiences of counselor trainees participating in a short term study abroad experience?	<ul style="list-style-type: none"> • Social interaction • Critical reflection • Cognitive dissonance • Application/experience

Social Interactions/Relationships

Peer dialogue provides the opportunity to see the world through the perspectives of others. Formal and informal conversations uncover convergences in attitude, background, and motivation. Mezirow (1997) stated that these discussions provide a framework to “analyz[e] the related experiences of others to arrive at a common understanding” (p. 7). Group projects are an effective method for peer exchange. In successful groups, participants are willing to share their own ideas while exploring others’. Group projects require participants to listen to each other’s ideas and work together to synthesize them into a working product. Social interaction provides opportunities for challenging assumptions, self-reflection, and developing new beliefs and actions. Caffarella and O’Donnell (1987) identify formal learning groups, acquaintances, and fellow enthusiasts as learning resources in self-directed study. The studies reported many learning instances from social interaction between participants and their colleagues, leaders, students, and community members.

Critical Reflection

As learners navigate life experiences and disorienting dilemmas, the quality of critical thinking—which happens through self-reflection and reflective dialogue—directly relates to the quality of transformative learning. Self-reflection has been encouraged in many different fields (Mezirow, 1991; Schön, 1983; Thong, 2015) and is typically used to contemplate what Rittel and Webber (1978) coined “wicked problems” (p. 155) or challenges that have no technical or previously identified solutions. Engaging in self-reflection involves examining or re-examining the validity of personal beliefs, assumptions, and understanding. It is a “deliberative and conscious process in which the person evaluates self image and self direction with a view of taking control of the way the self is shaped” (Chiaromonte & Mills, 1993, p. 145).

Study participants reflected “in and on learning” (Watkins et al., 2011, p. 8). Reflecting on learning refers to pondering actions that have already occurred. Conversely, reflection in learning, or reflection in action, means participants pause during the work to consider what is being done and said. This provides a chance to reframe the conversation as it is happening (Schön, 1983). Munby (1989) describes this reflection in the moment as teaching ourselves through experience. In pausing to reflect during learning, participants consciously examined what was said and how the puzzle pieces fit together to produce new ideas. Both reflection in learning and on learning allows individuals to compare past learning with new concepts to reframe the situation. Critical reflection is crucial in breaking the cycle of just doing what has always been done, giving individuals an ever-expanding breadth of vision.

Experience

The contradictions of diversity and sameness of experiences link humans. Individuals collect, day-by-day, layers of experiences that define and refine. These are past and present,

individual and collective, traumatic and healing. Experiences reflect all the ways humans are shaped throughout life. Therefore, it is evident that “the differences of class, culture, ethnicity...and gender are far more significant than the fact that [students] are children or adults” (Brookfield, 1996, p. 379). Individual experiences provide fodder for considering stratum of “sameness, difference, and power” (Teaching Tolerance, 2014, p. 19). In the reviewed studies, participants reported that previous experiences helped frame new learning. Additionally, practical application – or trying out new roles – helped change previous behaviors and ways of thinking.

Cognitive Dissonance

Cognitive dissonance is a type of disorienting dilemma many of the studies’ participants reported. Mezirow (1991) emphasized the power of disorienting dilemmas to generate transformative learning. Cox (2015) explained, “The majority of learners are not ready...until the easiness and familiarity of their everyday life is interrupted in some way...because their accustomed or habitual approach to events does not require significant thought or explanation” (p. 33). Prosek and Michel’s (2016) study participants experienced cognitive dissonance as students in another country. One participant uncovered ethnocentric viewpoints, stating, “I [realized] I automatically think of things through an American point of view” (Prosek & Michel, 2016, p. 69). In a study of 256 undergraduate business students, most respondents who reported transformative learning experiences recognized a disorienting dilemma as the trigger (Brock, 2010). These dilemmas are not simple challenges that can be resolved effortlessly. Instead, they “present a crisis that exceeds the capacity of the person’s cognitive framework to render them intelligible. As a result, one is not able to go on with one’s life and one feels oneself plunged into

nonsense or chaos” (Green & Mälkki, 2017, p. 71). These feelings necessitate the dilemma holder to take further action, reconciling old ways of being with new ways of thinking.

Planning for Growth

Self-directed learning encourages learners to create their own plans for development or growth. Mezirow taught, “we must learn to make our own interpretations rather than act on the purposes, beliefs, judgments, and feelings of others. Facilitating such understandings is the cardinal goal of adult education” (Mezirow, 1997, p. 5). A growth plan, also called a learning contract, identifies steps the learner might take to gain new learning or change past behaviors. Participants in three of the studies (Brooks & Adams, 2015; Kitchenham, 2010; Pearson et al., 2022) developed project plans based on existing competencies, frameworks, or models. The participants chose learning activities that aligned with their individual goals and interests.

Reflecting on the theoretical foundations of transformation, I have considered several possible directions that might emerge from my study’s data collection and analysis. First, I am curious about the participants’ perceptions of whether the certification process is self-directed and, if so, in what ways. Do the self-directed aspects support or impede transformation? Additionally, which, if any, of Mezirow’s transformational phases will align with participants’ experiences? Although I do not plan to measure developmental maturity, I would like to know what the data will indicate about the participants’ stages of adult development and the capacity to transform. Finally, the recommended practices for transformative learning (social interaction, critical reflection, experience, cognitive dissonance, and growth plans) are all found within the context of my proposed study. Which of these practices, if any, will be identified by participants as influential in transformation?

Limitations of Transformative Learning

In addition to limitations mentioned throughout this chapter, challenges to transformative learning include lack of consensus on definition and measurement, lack of empirical evidence, and inattention to power and privilege (Mezirow & Taylor, 2009; Taylor, 2007). Despite the abundance of academic writing on the subject, critics claim empirical evidence is lacking to support the theory, noting that transformative learning is difficult to operationalize and measure. Some argue that the theory is too broad and abstract, making it difficult to develop clear research questions and hypotheses that can be tested empirically. Definitions of transformation and the form that transforms vary widely. Furthermore, TLT focuses primarily on individual change, and does not adequately account for the social and cultural context in which learning occurs. The theory may not be well-suited for addressing systemic issues that require collective action. Brookfield (2012) asserted, “any research on transformative learning must, in critical theory’s terms, attend to the ways dominant ideology fosters or constrains what people consider to be transformative” (p. 132). Although Freire’s work inspired Mezirow, critics claim TLT does not adequately address issues of power and privilege, which are central to many transformative processes. They believe theory may not be well-suited for addressing systemic issues of social justice and equity (Mezirow & Taylor, 2009). While TLT has many potential benefits, it is important to consider these limitations.

Conclusion

This chapter began with a brief explanation of my proposed study. Professional development and adult learning principles were outlined, and developmental relationships were compared to distinguish coaching from other roles. Importantly, I identified coaching as both a formally established developmental role and a way of interacting in informal and formal

relationships to increase critical awareness, shared learning, and new ways of thinking. In addition, the roots of coaching were traced and led to an examination of empirical findings and limitations. I summarized the intersection of professional development, adult learning, and coaching.

CHAPTER 3

METHODOLOGY

The purpose of this study was to use a Constructivist Grounded Theory (GT) methodology to understand how learning and transformation are experienced by trainers who have completed a professional development certification program. The guiding research question asked:

1. What are the learning experiences of trainers who have completed a professional development certification program?

Additional questions to support data collection and analysis included:

2. How do trainers describe their learning experiences?
3. What catalysts or triggers do they identify as instrumental to their learning?
4. What is the nature of the developmental relationships that support the learning experiences of these individuals?

In this chapter, I first describe the context of the study: where the study takes place and how this site was selected. I then introduce the participants and why they were selected for this study. Next, I provide an introduction to GT, an overview of Charmaz's (2014) Constructivist GT, including its guiding theoretical assumptions from pragmatism and social interactionism, and describe core procedures and orienting questions. I conclude this chapter by describing my research design, including data collection, analysis, trustworthiness, and reflexivity statement.

Study Context

The context of my study is a trainer professional development system (TPDS) within an international non-profit organization that provides training and service delivery resources to family-support professionals using a home visitation model. Within this system, courses are facilitated by certified trainers. Trainers' skills, knowledge, and behaviors are developed through a professional development system in stages: application, qualification, candidacy, certification, mentorship, annual growth plans, and formal recertification. Experienced and highly skilled Trainer Development Specialists (TDS) use a coach approach to support trainer development. Trainers and TDSs "set learning and teaching goals, present content, reflect on the learning process, partner with others, and facilitate their own learning experiences and the learning experiences of others" (Parents as Teachers, 2016a, p. 1). The study's findings will supplement the current understanding of how professional development systems can support professional growth by identifying how adult learning and coaching principles fuel individual learning and transformative experiences. This study will focus on the certification experiences of trainers within this system; however, it is helpful for readers to have a basic understanding of both the TPDS and the home visitation model it supports.

The Home Visitation Model

The home visitation organization consists of several member types. The most relevant to this study are outlined in Table 3.1. The home visitation organization aims to support children's optimal development and families' well-being through relationship-centered conversations where research-based information is shared and strategies are practiced. Using the home visitation model developed by this organization, home visitation workers learn about families' interests, needs, and goals through perspective-taking and active listening. As the worker begins to

understand a family’s unique concerns, they gather information and resources to plan further conversations. During individual sessions with the family, usually in the home or in a virtual setting, the home visitation worker facilitates mutual learning, discovery, and decision-making for the purpose of family-driven change and growth. Throughout these sessions, the worker encourages ongoing reflection on experiences, ideas, and feelings, resulting in a recursive loop of learning and development.

Table 3.1

Home Visitation Model Members and Roles

Member	Roles
International Home Visitation Organization (IHVO)	Development of a family-support home visitation model consisting of: <ul style="list-style-type: none"> • Essential requirements and quality standards • Core model certification training • Curriculum, planning, and documentation resources • Implementation support resources • Continuous quality improvement supports
IHVO training department	Development of <ul style="list-style-type: none"> • core and advanced training offerings for home visitors • curricula and service tools for home visitors
IHVO certified national trainers ²	Complete training-of-the-trainer certification to facilitate one or more training offerings developed by the international home visitation organization, including the model certification core training for new home visitors
IHVO implementation support providers	Provision of ongoing implementation support through a combination of webinars, courses, tools, and reference materials
IHVO research and quality improvement department	Engage home visitation model affiliates in continuous quality improvement through ongoing research and quality endorsement processes
Home visitors	Provide parenting and family support services to families using the model curriculum and tools

² The learning and development experiences of national trainers in the international home visitation organization’s certification process are the focus of the author’s study.

Home visitation workers must successfully complete foundational model certification training before they can begin using the parenting education model. In this course, learners are introduced to and practice skills relating to the model's approach of partnering, facilitating, and reflecting for working with families; parent and child development concepts; the model curriculum and associated tools; foundational theories; model components, requirements, and quality standards; implementation strategies and practices; and reflective supervision activities. Thus, the trainers who facilitate the training have a vital role in ensuring home visitors are prepared to provide family support services that are congruent with the model's research-based and evidence-informed approach.

The international home visitation organization employs coaching as a developmental tool based on models such as cascading coaching (Hosmer, 2006) and parallel process (Miller, 2004). The cascading coaching model is an approach to organizational coaching that involves the systematic transfer of knowledge, skills, and abilities from one level of the organization to another (Clutterbuck, 2005). Cascading coaching is particularly useful for organizations looking to implement coaching as a developmental tool, as it maximizes the impact of coaching by extending its benefits to multiple individuals and levels within the organization (Wilson, 2011). It is based on the premise that learning can be more effectively disseminated throughout an organization by training a select group of individuals, who then pass on their knowledge and skills to others (Hosmer, 2006). The process typically begins with an organization's senior leadership, who engage in academic, empirical, and peer development activities with external experts or professionals to gain a deep understanding of particular concepts. These leaders then coach their direct reports, who in turn coach their own team members, creating a domino effect that enables coaching and learning to permeate the organization (Wilson, 2011). Throughout

each level of coaching and facilitation, additional concepts and learning are generated through interaction and feedback between peers and practitioners.

Parallel process refers to the idea that similar patterns of behavior or emotional responses can be observed at different levels within a system, such as between supervisor-employee, trainer-participant, participant-participant, and even trainer-trainer interactions (Miller, 2004). Both cascading coaching and parallel process emphasize using reflective practice to understand the dynamics of learning and relationships better. Reflective practice is the process of critically examining one's methods, experiences, and beliefs to gain insights and improve effectiveness (Wang, 2012). Recognizing and analyzing parallel processes can help content developers, trainers, and learners become more aware of the underlying issues in their work and developmental relationships, making them better equipped to address those issues effectively. Both learning facilitators and learners are encouraged to share their reflections and insights with colleagues, fostering a supportive community of practice that can contribute to professional development and the overall quality of education. Ideally, awareness generated by reflective practice leads to improved performance, and further learning is generated as individuals experiment with new roles and behaviors.

The cascading coaching and parallel process models offer a powerful approach for organizations looking to foster a coaching culture and maximize the impact of developmental relationships on development and performance. These approaches underpin the international home visitation organization's trainer professional development system that prepares trainers to facilitate the model's core certification training and related advanced trainings.

The Trainer Professional Development System

The organization's TPDS consists of core values, a theoretical framework, roles, tasks, and collective supports designed to ensure that all certified trainers obtain the necessary support to achieve a high level of trainer competency that shapes the knowledge and practices used by parent educators in supporting strong children, families, and communities (Parents as Teachers, 2016b). The system is represented in Figure 3.1. Adult learning (Knowles, 1980), parallel process (Pawl & St. John, 1998), and coaching (Lipton & Wellman, 2003) approaches to learning form the theoretical framework. The framework guides the progression from trainer candidate to certified trainer and supports individuals through competency self-assessment, mentoring, and professional learning opportunities. Additionally, it includes a process for individual trainers to identify their professional development goals and devise strategies to achieve those objectives. Two foundational beliefs of the TPDS are that certified trainers have a high level of knowledge and skill across most trainer competencies, and all trainers have areas where growth and improvement can occur (Parents as Teacher, 2023).

Maintaining a growth mindset



Figure 3.1 *Trainer Professional Development System Model*

From *The Parents as Teachers Perspective on Trainer Support* by Parents as Teachers National Center, 2016.

The TPDS uses a collaborative learning cycle to help adults incorporate new knowledge in learning phases: activation and engagement, discovery and exploration, and organization and integration (Garmston & Wellman, 2016). These structures are also used in the courses the trainers deliver. The collaborative learning cycle's relationship-based and participant-focused approach emphasizes the importance of research-based information and evidence-informed practices in informing the content and methods of facilitation and resources. Trainers partner in learning, facilitate learning, and reflect on learning within the context of relationships (Parents as Teachers, 2016c). Partnering prepares learners for success in their roles, allows expertise and experience sharing, and fosters collaborative decision-making. Facilitating assists individuals or

groups in moving from their current state to a desired state, tailoring the learning experience, creating a safe atmosphere for engagement, and promoting knowledge acquisition and skill development. Reflecting provides time and space to contemplate the learning experience’s meaning, consider different perspectives, and enhance self-awareness, motivation for change, and the application of learning into practice. Transparency of roles within the TPDS fosters a shared understanding, knowledge, and trust that enables national trainers to fully engage and grow in their professional roles. The TPDS roles are described in Table 3.2.

Table 3.2

Trainer Professional Development System Roles

Role	Description
Trainer candidate	Individual chosen to enter the train-the-trainer process based on their expertise in a content area and their commitment to working with a trainer development specialist to meet the standards required to become a national trainer.
Trainer development specialist	Supports, instructs, coaches, observes, and provides data-informed feedback to a trainer candidate throughout the training process. They collaborate with a manager to determine the successful completion of the process and certification. These individuals are experts from the TPDS.
National trainer—first year	A certified trainer who receives dedicated guidance from a mentor to refine and enhance their training practices and to identify directions for ongoing professional growth.
National trainer	Embodies the Parents as Teachers training approach and maintains certification by meeting training standards and participating in ongoing professional development.
Mentor	Partners with national trainers to set learning goals and navigate ongoing professional learning opportunities. Trained to work in learning partnerships with professional trainers using reflective, consultative, and coaching strategies, the mentor does not determine trainer status. Mentors are usually also trainer development specialists.
Manager	Ensures training quality, along with the director of training, by utilizing structures and reporting tools designed to demonstrate progress towards or maintenance of training excellence for courses.

The TPDS perspective on trainer support focuses on several key objectives, including maintaining a learning culture that encourages growth, providing collaborative relationships for professional growth, establishing learning agreements, and offering ongoing support for the development of trainer competencies. This approach incorporates both collective and individualized support to ensure that trainers receive the necessary resources, guidance, and professional development opportunities. Collective supports include training materials, trainer resources, professional learning opportunities, annual trainers' meetings, monthly trainer calls, and web-based communication platforms. Individualized supports include a pre-service trainer candidacy process, guided development through two levels of training experience, coaching by a mentor in the first year, reflection on practice with colleagues, and coaching provided by the training manager. This development process is shown in Figure 3.2.

Application	Qualification	Candidacy	Certification & Mentoring	Annual Growth Plan	Recertification
Applicants must have a master's degree in early childhood education, social work, family support, or a related field; subject matter expertise and experience; active involvement in family support work at a local, state, national, or international level; two years home visiting experience; and successful experience in training other professionals.	During the qualifying phase, applicants observe the training for which certification is being sought; submit a recording conducting a family support home visit; demonstrate minimum level of trainer competency by providing a recording of a current, solo facilitation experience; and interview with TPDS manager.	Candidate completes two levels of experience in the training for which certification is sought. For each level, a trainer development specialist (TDS) serves as the trainer candidate's (TC) coach, calibrator, collaborator, and consultant. The TC and TDS partner to identify TC goals, strengths, and opportunities for improvement. Certification is earned after successfully completing candidacy.	In the first year of certification, the new trainer receives ongoing support from a mentor. Mentoring is designed to support continued development and solidify ongoing reflective and learning practices. The experience includes discussions about progress toward goals developed during candidacy and consultation on future development.	Trainers develop individual annual growth plans to prioritize key areas for continued development. The plan helps trainers focus efforts on creating steps and timelines towards specific goals related to trainer competencies.	Trainers' knowledge, skills, and behaviors are evaluated every three years to assess trainer competencies and offer support to trainers towards refinement of those competencies to enhance the quality, fidelity, and delivery of trainings. The recertifying trainer and a TDS partner to identify potential growth areas and develop a corresponding action plan.

Figure 3.2

Trainer Professional Development System Process

The roles of training management, trainer development specialists, mentors, and colleagues are crucial for trainer support within the system. These roles create a relationship-based and strengths-based process that fosters professional growth in knowledge and skills. Support is provided throughout the various stages of trainer development, from the initial candidacy process to the first year as a certified national trainer. Training guidance is facilitated through reflective practice, coaching, and consulting, taking place in various environments. Monthly trainer communications through web calls, coordinated by the training manager, offer information sharing, ongoing professional development, and encouragement for colleague connections. Access to the training manager is available at all stages of trainer development, ensuring a comprehensive support system for trainers. The TPDS stage of focus for this study is the candidacy and new certification phase, as indicated in Figure 3.3. The growth process supports of the TPDS makes it an ideal context for carrying out a GT study of the learning experiences of trainers who have completed a professional development certification program.



Figure 3.3

Focus of the Author's Study

Participant Selection

Participants included ten individuals who completed a trainer certification process and are still members of the associated trainer professional development system. Critical case sampling was used to identify participants. Critical case sampling is a type of purposeful sampling, a technique used to deliberately select participants who will provide the most relevant data for the research question (Creswell, 2013). Critical case sampling selects individuals who provide unique examples to help the researcher identify key factors or variables central to the

phenomenon under study. According to Creswell (2013), critical case sampling is advantageous in exploratory research like GT, where the researcher does not have a well-defined theory or hypothesis to test. The cases selected can be typical or atypical in relation to the phenomenon being studied and provide rich data that gives deep insights into the phenomenon being studied. Critical case sampling assists in identifying key factors that are relevant to the broader population or context being studied.

The possible participant pool included approximately 70 individuals. There are only two males in the training cadre. Participant selection criteria are (1) successful completion of the trainer certification process at least one year prior to the study and (2) no longer than ten years ago and current membership in the TPDS. Because my research interests were not tied to any preset trainer characteristic (e.g., gender, age, background), I started data collection with five randomly selected trainers from the eligible population. A short interest survey was sent to all trainers who met the selection criteria. The survey collected basic demographic information and willingness to participate in the study. Trainers who agreed to participate in at least an initial interview were randomized.

As codes were identified from initial data collection, identified categories influenced whether and which additional criteria was used in further participant selection. This process helped confirm or refute tentative theorizing. As participants were added, data collection and analysis continued simultaneously. This process continued until I reached data saturation, meaning no new findings emerged from the data.

Design of the Study

Research facilitates learning about humanity and the world in which we live. It enables the discovery of new knowledge and the expansion, clarification, or correction of existing

knowledge and theories. Formal research is “systematic investigation, including research development, testing and evaluation, designed to develop or contribute to generalizable knowledge” (Office for Human Research Protections, 2009, p. 4). A research methodology provides a specific structure for how a study is implemented. Researchers consider the study’s purposes and their personal philosophical orientations to choose a congruent methodology. Researchers believe that choosing a suitable method lends support to the alignment between the aims of the study and the paradigmatic lens guiding it, deepening our understanding of the world and our place in it.

Constructivist GT is a qualitative research methodology. Qualitative research methodologies use non-numerical data collection and analysis to explore and understand complex phenomena (Flick et al., 2004; Stake, 2010). They approach the topic to be studied through the subjective experiences and meanings of participants or affected individuals. Qualitative research is often used in social sciences and humanities research because it allows researchers to deeply explore and understand complex social, cultural, and psychological phenomena as they are lived and experienced.

Qualitative research often has “a strongly applied orientation in the questions it addresses and in its methods of procedure” (Flick et al., 2004, p. 3). Stake (2010) asserted, “qualitative studies are best at...examining the actual, ongoing ways that persons or organizations are doing their thing” (p. 2). The methods used by qualitative inquirers include observation, interviews, and document review. Data are analyzed using techniques such as thematic analysis, content analysis, discourse analysis, and so forth.

Kathy Charmaz’s (2014) Constructivist GT approach “places priority on the studied phenomenon and sees both data and analysis as created from shared experiences and

relationships with participants and other sources of data” (p. 239). A Constructivist GT design aligns with my aim to understand what is happening in the certification process instead of simply describing it (Gibbs, 2015). Additionally, embarking on the GT research journey with a broad question allows the data to “take [me] beyond any preconceived directions or findings that [I] might have had, the end-point limited only by lack of imagination, time, and other constraints” (Freeman, 2014, p. 829).

A Brief History of Grounded Theory

GT is both a research methodology and a product of that methodology. The genesis of GT began as a rejection of the scientific method’s use in qualitative research (Charmaz, 2014). In 1967, Glaser and Strauss released their seminal text, *The Discovery of Grounded Theory: Strategies for Qualitative Research*, which contended that theory could be generated inductively from data (Charmaz, 2014; Corbin & Strauss, 2014). GT uses iterative and simultaneous data collection and analysis to develop a theory grounded in the data. Previously, the primary accepted research methods involved deductive testing to refine, confirm, or reject pre-existing categories and theoretical frameworks. At Columbia University, Glaser studied quantitative research methods under Lazarsfeld, who was well-known for codifying quantitative research in sociology (Jeřábek, 2001). This experience inspired Glaser to develop an equally rigorous approach to qualitative research. While GT is most often associated with qualitative studies, its methods are equally suited to quantitative research.

After the release of their seminal book, Glaser and Strauss’s approach to GT began to diverge, resulting in three core GT types: Classic GT, Interpretive GT, and Constructivist GT (Chun Tie et al., 2019; Evans, 2013; O’Connor et al., 2018; Sebastian, 2019). Classic GT is associated with Glaser’s work and is considered the most traditional style. Strauss, Corbin,

and Clarke are the most well-known proponents of interpretive GT. Building on the work of Glaser and Strauss, Charmaz developed Constructivist GT. There are several similarities across the three GT types. Charmaz (2014) explained, “We may have different standpoints and conceptual agendas yet we all begin with inductive logic, subject our data to rigorous comparative analysis, aim to develop theoretical analyses, and value GT studies for informing policy and practice” (p. 14). Iterative, simultaneous data collection, coding, and memo writing are the main activities of all GT (Chun Tie et al., 2019; O’Connor et al., 2018). The constant comparative method is consistently used to organize and analyze data. Beyond these, classic, interpretive, and Constructivist GT have distinct conceptual and guiding principles. These differences are shown in Table 3.3.

Table 3.3

Comparison of Grounded Theory Types

Category	Classic Grounded Theory	Interpretive Grounded Theory	Constructivist Grounded Theory
Definition	“Classic GT is simply a set of integrated conceptual hypotheses systematically generated to produce an inductive theory” (Glaser & Holton, 2004, p.3)	“GT is a general methodology for developing theory that is grounded in data systematically gathered and analyzed” (Strauss & Corbin, 1994, p. 273)	Constructivist GT is a “constellation of methods” (Charmaz, 2014, p. 14) that “shreds notions of a neutral observer and value-free expert” (Charmaz, 2014, p. 13)
Epistemological positioning	Emerges from positivist stance but ascribes to neutrality	Post-positivist interpretivism, symbolic interactionism	Constructivism is influenced by symbolic interactionism based on interpretivist and subjective assumptions
Role of researcher	Researcher’s preconceptions are minimized by strict adherence to guidelines	Researcher interprets the data to author theory	Theory co-constructed by researcher and participants; encourages reflexivity
Use of literature	Literature review conducted after data analysis and theory development to limit preconceived notions	Allows early engagement in the literature prior to and throughout data collection	Literature used as inspiration in research design and analysis, cautions awareness of literature influence

Category	Classic Grounded Theory	Interpretive Grounded Theory	Constructivist Grounded Theory
Research Questions	Research begins with a purposefully broad substantive question that is refined during data analysis	Research begins with flexible questions that are refined during data analysis	Data collection flows from research questions. Questions may evolve based on what is discovered
Interview technique	Begins with unstructured interviews, refining questions for subsequent interviews as data emerges	Semi-structured interview questions with suggested prompts and follow-up questions; questions are refined throughout interviews	Flexible interview guide with preconstructed questions on fundamental topics; follow unanticipated threads
Coding and Analysis	Open coding to identify categories; theoretical coding defines connections; constant comparison pinpoints a core category; integrates iterative memo writing to analyze data and codes	Adds axial coding to Classic GT coding. Axial coding considers conditions and interactions between categories	Initial naming (coding) of data, followed by coding to sort, merge, and organize codes. Integrates iterative memo writing to analyze data and codes. Allows for multiple core categories
Theory Development	Theory emerges from iterative process of data collection, coding, memo writing, and analysis. Theory is developed when the fewest possible concepts explain the core category within the scope of the study	Aligns with Classic GT	Contends theory is a conceptual product based on the researcher's interpretation of the co-constructed experience found in the data

Constructivist Grounded Theory Theoretical Assumptions

As developed by Charmaz (2014), the primary purpose of Constructivist GT is the co-construction of theory by the researcher and participants. The constructivist approach rejects the notion that research is discovered and “explicitly assumes that any theoretical rendering offers an interpretive portrayal of the studied world, not an exact picture of it” (Charmaz, 2014, p. 17). Guided by pragmatism and a symbolic interactionist perspective, it maintains that the researcher is inescapably cast as an actor in the study. Kathy Charmaz began developing her Constructivist GT methodology while researching death in the 1970s. Charmaz (2014) believed in the efficacy of the classic GT strategies of coding, memo writing, constant comparison, and theoretical

sampling but felt the approach ignored the social constructionist perspective. She noted, “social constructionists, in the 1980s, were looking at the social construction of everything by other people, but not their own constructions of their analyses in a self-critical way. That’s the point when I chose ‘constructivist’” (Social Science Space, 2020, para. 5). Charmaz (2014) believed “interaction is inherently dynamic and interpretive and addresses how people create, enact, and change meanings and actions” (p. 9). Social constructivists like Vygotsky and Lincoln influenced her position. Social constructivists maintain that learning occurs within the context of social development and culture (Smagorinsky, 1995). Learning is a product of social interactions across time and space.

Charmaz (2014) and other critics believed early GT “fragmented the respondent’s story, relied on the authoritative voice of the researcher, blurred difference, and uncritically accepted Enlightenment grand metanarratives about science, truth, universality, human nature, and world-views” (p. 13). In contrast, the constructivist approach adopts the perspective that social and research reality is constructed through the research and participants’ varied positions, experiences, and perceptions. The constructivist approach retains “the inductive, comparative, emergent, and open-ended approach” (Charmaz, 2014, p. 12) of classic GT and interpretive GT’s emphasis on iterative logic and pragmatic tradition. It adds the assumption that reality emerges within the context of the study and the interactions of all those involved. Constructivist GT posits that the researcher cannot objectively observe a study (Charmaz, 2014). The researcher is an inextricable actor in the research and becomes a co-creator with participants. Humans are unable to separate personal biases from the qualitative research process entirely. Indeed, “subjectivity and interaction are assumed” (Merriam & Tisdell, 2016, p. 147). Qualitative researchers use reflexivity to identify and acknowledge subjectivity as a frame for their analysis and

interpretation (Alvarez-Hernandez, 2021; Johnson & Parry, 2015; Merriam & Tisdell, 2016). Charmaz (2014) asserted, “Viewing the research as constructed rather than discovered fosters researchers’ reflexivity about their actions and decisions” (p. 13). Thus, the GT constant comparison method applies not only to the categories identified in the data but also to how the researcher assigns meaning to them.

Constructivist GT embraces flexibility in the research process. Charmaz (2014) referred to this as a “constellation of methods” (p. 14). Although acknowledging key variations, she encouraged researchers to avoid pitting the versions against one another. Instead, researchers are encouraged to view the various GT approaches as a collection of adaptable strategies.

Symbolic interactionism (SI) is the central GT theoretical perspective rooted in the Chicago form of pragmatism. The essence of SI is that symbols and language are tools individuals use to make sense of social life and influence action (Barbalet, 2009). The perspective is further defined by a set of assumptions that inform the questions GT researchers ask about data and the developed theory. The perspective investigates the individual or micro level of society. However, what is learned can be applied to the macro or societal level.

In the early twentieth century, scholars at the University of Chicago developed the pragmatic tradition, which assumes “the values of theories or beliefs rests on effective practical application” (Charmaz, 2014, p.263). American educator John Dewey (1859-1952) was one of the original proponents of pragmatism, teaching that knowledge is impermanent and valuable only as much as instrumental to those who employ it (Bryant, 2009). William James (1842-1910), the famous American psychologist, took a pragmatic approach and encouraged a view of future truth as malleable and evolving (Charmaz, 2014). Knowledge, or truth, is created as humans work to solve problems. Thus, reality is interpreted through the lens of the interpreter’s

actions and experiences. Pragmatists frequently ask a form of this question: “Would it matter if Theory A is right, and Theory B is wrong?” If the answer is no, the difference in interpretation is irrelevant.

SI grew out of the pragmatist tradition. In their respective fields, James and Dewey analyzed how people use symbols to understand their experiences. Dewey’s work on pragmatism influenced his student George Herbert Mead (1863-1931) to form the groundwork for SI. The sociologist, philosopher, and psychologist outlined his ideas in his book *Mind, Self and Society*. Known as one of the founders of social psychology, Mead believed individual development and the meanings people assigned to things were social processes (Schellenberg, 1990).

Crediting Mead’s work, Herbert Blumer coined the term *symbolic interactionism* in 1937. Blumer argued that social reality is constructed through individual and collective action (Charmaz, 2014). He was deeply interested in social research and disparaged the traditional positivistic research methodologies popular in his time. Other symbolic interactionists who influenced Charmaz (2014) include Charles Horton Cooley, who proposed that individuals see themselves based on how they perceive other people think of them (looking-glass self); William Issac Thomas, who was interested in the subjective world of consciousness; and Erving Goffman, whose work explored role taking and role making as a critical mechanism of social interaction.

SI is a sociological perspective asserting that people ascribe symbolic meaning to objects as a function of social interaction. The perspective “addresses the subjective meaning people place on objects, behaviours or events based on what they believe is true” (Chun Tie et al., 2019, p. 2). Charmaz (2014) summarized SI as “a dynamic theoretical perspective that views human actions as constructing self, situation, and society” (p. 262). The perspective is a continual

looped course of action and interpretation: the way people interpret their situation leads to action, and action leads to further interpretation. Behavior reflects the interpretation of the situation and the actions of others. It is impossible to determine whether action or interpretation occurs first.

SI focuses on the interaction between individuals and the reciprocal nature of interpretation and action. Charmaz (2014) explained, “The Chicago heritage imbued SI with emphases on human agency, language, and interpretation” (p. 263). Verbal and non-verbal language and communication form the basis of social interaction. The interpretation of a thing or action varies considerably based on the words used (or not used) to describe it and the previous experiences of the interpreter. Thus, interpretations are temporary and subject to modification over time. People change based on their interactions with other people, things, and ideas. In these interactions, people assign meaning, which in turn influences action. Thus, humans actively and continually construct the social world.

Blumer believed that reality—shared and individual—is created through the daily interactions of individuals (Schellenberg, 1990). No set reality exists because reality is based on individual perspectives and experiences. Additionally, reality changes over time through human interaction. These interactions are shaped by symbols and shared language, which constructs the meaning assigned to objects, ideas, and experiences. Shared language includes body language and gestures. Societies are created through shared meanings for many symbols and concepts. However, the meaning assigned to objects varies by individual, and the meaning is subject to change through continued interactions (Schellenberg, 1990).

As described by Blumer, SI assumes three foundational assumptions: (1) the way people act is based on their interpretation of the world around them, (2) those interpretations are based on current and previous social interactions with others, and (3) interpretations change or evolve

as the person processes interactions with the world (Charmaz, 2014; Schellenberg, 1990).

Charmaz (2014) expanded on Blumer's original assumptions with three additional premises: (1) people make meaning of things through shared language, (2) meaning is negotiated through iterative processing in social interaction, and (3) the meaning-making process is largely unnoticed until the interpretation is challenged, or experiences diverge.

Blumer's first premise is a departure from the traditional notion that meaning emerges from an object. However, Charmaz (2014) observed that Blumer's explanation implies that meaning assignment precedes a person's action. She clarifies that SI is a continuous, reciprocal process that connects meaning-making to previous and current actions and experiences. An example of this premise is the concept of hunger. Hunger holds different meanings for people. A typical middle-class individual may consider hunger a general discomfort after a few hours without food. However, for an individual experiencing food instability, hunger might be defined as an ongoing, gnawing need for additional caloric nutrition. At their next meal, the eating behaviors of the middle-class individual and the person experiencing food instability could be expected to diverge.

Charmaz's (2014) third addition to Blumer's premises explored the habitual nature of social life. As people interact with family, co-workers, colleagues, friends, and even strangers, we "adopt collective identities and subscribe to certain collective values and actions that may not demand a person's continual scrutiny" (Charmaz, 2014, p. 271). These collective practices and values become habitual and are less likely to require ongoing internal conversations. Thus, the actions become subconscious unless a disorienting or surprising event occurs. A disorienting situation happens "when 1) people find themselves torn between conflicting desires, demands, or

directions, 2) their current practices do not resolve the situation, and/or 3) the problem lies outside their existing normative framework” (Charmaz, 2014, pp. 271-272).

Charmaz (2014) argued that the “pragmatist underpinnings of symbolic interactionism...form an open-ended theoretical perspective from which grounded theory researchers can begin their studies” (p. 264). Pragmatists emphasize process and change. This perspective supports GT researchers’ study of change using abductive logic. SI furthers this by encouraging researcher sensitivities to assigned meanings and individual actions based on societal interactions. Blending GT and SI into a “theory-methods package” (Charmaz, 2014, p.282) provides a framework for inquiry into identity, agency, action, and reality. The perspective facilitates analysis by raising theoretical questions about the data.

Rationale for Using Constructivist Grounded Theory

O’Conner et al. (2008) counseled researchers to carefully determine their epistemological assumptions for choosing a research method. Many methodological approaches might be acceptable. However, methodological choices should consider both the subject to be researched and the researcher’s paradigm. At a fundamental level, the essential tenets of Constructivist GT resonate with my research intentions as the method seeks to understand a process or experience for which previous theory is inadequate.

In my study, I expect to see glimpses of many of the adult learning, transformation, and developmental theories or frameworks I discussed in chapter two. However, I assume that those theories separately are insufficient to explain all the complexities of trainer learning and transformation experiences in the development system I plan to study. I am most interested in the ‘constructed’ aspect of Constructivist GT; I want to immerse myself in the words that people use to describe their experiences. In alignment with constructivist approaches, I believe that multiple

realities can and do exist as constructed by individuals through interaction with others and the world around them. Furthermore, the reflexivity mandated by Constructivist GT recognizes the impossibility of completely divorcing the researcher from the research yet expects biases and assumptions to be made explicit in the development of emerging theory. In this way, I can acknowledge the influence of my ideas and cognitive style on the analysis and synthesis of data.

Data Collection

I collected data through semi-structured interviews and basic surveys. Data collection is a keystone activity in research. It involves gathering information that provides the basis for exploring and understanding research questions. Rich, context-specific data is accumulated from individuals, groups, or artifacts using various methods such as observation, interviews, focus groups, and document analysis (Charmaz, 2014). Extensive field notes, participants' writings, and transcripts deepen the researcher's understanding. Data collection methods allow researchers to explore the experiences and perspectives of individuals to "reveal participants' views, feelings, intentions, and actions as well as the contexts and structures of their lives" (Charmaz, 2014, p. 23).

Collecting high-quality data is critical to the validity and reliability of qualitative research. Researchers must ensure that data collection methods are appropriate for the research question and objectives. Charmaz (2014) reminded us:

Through our methods, we first aim to see this world as our research participants do – from the inside. Although we cannot claim to replicate their views or reproduce their experiences in our own lives, we can try to enter their settings and situations to the extent possible. (p. 24)

Researchers' data collection choices directly impact the depth of understanding gained.

Before designing a data collection plan, researchers should consider the aim of the study. Charmaz (2014) recommended that the researcher consider orienting questions such as “What do you want to study? Which research problem might you pursue? Which tools will help you proceed? How do you use methods to gather rich data?” (p. 22). Persistent inquiry aids researchers in narrowing down which strategies best align with their studies. Choosing congruent strategies results in valuable data for analysis. A critical consideration is imagining which methods will support the researcher in gaining, as much as possible, the participants’ perspectives of the setting and context of the experiences. The size and scope of the data collection also contribute to the richness of the resulting data.

Constructivist GT offers flexibility in the timing of data collection methods and the freedom to revise methods to follow emergent threads of interest. Charmaz (2014) eloquently advised, “With flexible guidelines, you direct your study but let your imagination flow” (p. 26). Harkening back to the premises of SI, it is essential to remember that the researcher’s design choices influence what the researcher and participants will experience through the study, thus influencing the co-creative process. The researcher uses theoretical sampling to adjust focus areas to follow new leads as ideas and concepts emerge in interactive collection and analysis. In theoretical sampling, the researcher “jointly collects, codes, and analyzes...data and decides what data to collect next and where to find them” (Glaser & Strauss, 1967, p. 45). This allows the researcher to “add new pieces to the research puzzle or conjure entire new puzzles while gather[ing] data, and that can even occur late in the analysis” (Charmaz, 2014, p. 25).

Surveys

Surveys were used to (1) determine interest in research participation, (2) collect trainer demographics, and (3) collect previous educational and work experience. The voluntary survey explained the nature of the research to be conducted and collected the following information:

- Trainer name
- Years of training experience prior to entering the certification process
- Year trainer achieved certification
- Basic demographics
- Educational background
- Previous work experience
- Level of willingness to participate in the study:
 - Willing to participate in the study
 - Willing to participate in an initial one-hour interview
 - Willingness to participate in a follow-up interview
 - Willingness to participate in a paired interview or focus group

Interviews

Charmaz (2014) recommended *intense interviews*, which she defines as “gently-guided, one-sided conversation[s] that explore research participants’ perspective on their personal experience with the research topic” (p. 56). Depending on the study, the scope might be broad or narrow. The approach relies on open-ended questions to elicit detailed descriptions and requires the researcher’s attention to explicit and implicit meanings in responses. In Constructivist GT, a flexible interview guide supports the researcher’s focused inquiry while allowing responsiveness to new or intriguing ideas that arise (Charmaz, 2014).

I conducted a series of semi-structured individual interviews to explore perceptions of learning and transformations through “a few broad, open-ended questions” (deMarrais, 2004, p. 62) and used paraphrasing and clarifying questions to check interpretations of concepts (Roulston, 2021). Interviews are GT’s most common data collection method (Charmaz, 2014). Semi-structured interviews use open-ended questions as a guide. This interview approach allows the researcher to cover the primary focus areas while providing freedom to pursue emerging concepts by allowing the interviewer to ask follow-up questions and probe for more information based on the participant’s responses (Charmaz, 2014). According to Roulston (2021), the open-ended and flexible nature of semi-structured interviews enables researchers to explore complex topics in depth. It can help to uncover underlying patterns or themes in the data.

Roulston (2021) cautioned researcher-interviewers that semi-structured interviews require careful planning as the interviewer must be able to ask follow-up questions and probe for more information. This planning requires the interviewer to have a deep understanding of the research question and the study’s theoretical framework and to be able to adapt the interview questions and techniques based on emerging data. Additionally, interviews necessitate establishing rapport with the interviewee (Charmaz, 2014; Roulston, 2021). Roulston (2021) advised, “Although questions seek answers, asking one does not mean an answer will be forthcoming” (p. 3). To this end, I paid special attention to creating physically comfortable environments and building trust. The interviewer’s positionality, affect, and ability to establish a psychologically safe environment influence participants’ responses.

Interview questions were based on the study’s research questions. Experts in the fields of adult learning, transformation, professional development, and coaching were asked to review the interview guides and provide suggestions. Interviews were conducted online using video

conferencing software. Each interview was recorded and transcribed. Interviewees were allowed to review transcripts and correct content. The interview guide is provided in Table 3.4.

Table 3.4

Interview Guide

Question	Possible Materials or Prompts
Did you have an opportunity to review the materials? [possible materials: recruiting flyer, study summary]	<ul style="list-style-type: none"> • recruiting flyer • study summary
Tell me about your trainer experience outside of the trainer professional development system.	<ul style="list-style-type: none"> • years of trainings • related fields of study/experience • types of credentials • level of education • other careers
How would you describe your training philosophy? OR What values or beliefs influence you as a trainer?	<ul style="list-style-type: none"> • theoretical influences • values
What brought you to the trainer professional development system?	
Describe the phases of the certification process as you understand/remember them. OR How would you describe the certification process to someone unfamiliar with it?	
Describe how you experienced learning or change in the certification process.	
What is most memorable from your certification experience?	
Tell me about anything significant during the process that prompted learning or change. What role did the trainer development specialists and/or mentors play in your learning?	
What was missing from the certification process? OR Tell me about anything in the process that impeded your learning or development.	

Data Analysis

As noted previously, Constructivist GT employs a ‘constellation of methods.’

Recognizing this constellation may confuse novice researchers, Charmaz (2014) outlined nine actions that define GT: (1) data is collected and analyzed iteratively and simultaneously, (2) actions and processes are the focal point of analysis, not themes and structures, (3) use of constant comparison, (4) new conceptual categories are developed from data, (5) conducts systematic data analysis to develop inductive categories, (6) aims to construct theory instead of test for existing theories, (7) employs theoretical sampling, (8) seeks variation in the data, and (9) looks to identify specific categories rather than general empirical topics. As a co-constructing actor, the researcher uses continual hermeneutic analysis in a “creative act of clarifying [their] understanding and recirculating that understanding back into the world” (Freeman, 2014, p. 829).

Coding

In the iterative GT processes, analysis begins in the coding process. Coding happens in stages, beginning with *initial coding* and then *focused coding*. Coding identifies processes and actions – what Charmaz (Gibbs, 2015) called “*gerunding*” (58:20). Gerunds are verbs that function as a noun and ends in *-ing*. For example, *running* in the sentences “Running helps me relax” and “I hate running.” Homing in on gerunds helps to answer the key GT question, “What is happening?” while coding for processes helps identify the structures constructed through social interaction (Charmaz, 2014).

The coding process involves analyzing the data in parts (e.g., by word, line, incident) and “naming segments of data with a label that simultaneously categorizes, summarizes, and accounts for each piece of data” (Charmaz, 2014, p. 111). The research engages in an iterative inquiry into the meaning of the data fragments. Fragments might tell a story, describe emotions,

or provide explanations. In Charmaz's (2014) approach, initial coding involves line-by-line coding to explore as many categories as possible. The codes are constructed from the data. Focused coding involves sorting and organizing the codes into the most substantial and frequent categories. Careful coding leads to "generalizable theoretical statements that transcend specific times and places and contextual analyses of actions and events" (Charmaz, 2014, p. 113). The researcher then takes the data that stands out and explores it further through memos.

Data analysis through coding began after the first interview. Interviews were recorded, transcribed, exported into Word and PDF documents, and printed. Initial coding was done using a pencil. Charmaz (Gibbs, 2015) recommends this technique as a kinesthetic activity that aids focused analysis and in vivo coding. Subsequent coding was done using highlighting and commenting in Word.

Using a symbolic interactionist perspective, I looked for assigned meanings, shared language, and social interaction evidence to understand the participants' experiences. Memo writing documented ideas, connections, and tentative theorizing throughout data connection and analysis. When data saturation was achieved, core categories were used to construct a theory that interprets assigned meanings and actions in the trainers' growth experiences.

Memo Writing

Memo writing is a vital part of the GT analytic process. At any point in the study, an idea or connection might occur to the researcher. Pausing to write a memo about the idea helps to document ongoing meaning-making. Memos become "reflective interpretive pieces that build a historic audit trail to document ideas, events, and the thought processes inherent in the research process and developing thinking of the analyst" (Chun Tie et al., 2019, p. 4). Recording ongoing

analyses and interpretations supports further analysis and reflection. The process also gives a concrete way to organize the study.

Memo writing is a spontaneous activity. As such, Charmaz (2014) recommended avoiding mechanical or formal writing methods. Instead, memos can take many forms. The researcher might use bullets, diagrams, and casual language. The critical element is making a record of connections and ideas. Memos are stored in computer files for future review and sorting. The categories developed through coding helped interpret the value of those categories to the area of study. Memos often become early drafts of constructed theory.

Theoretical Sampling and Constructing Theory

As analysis proceeds, the researcher may recognize a need to return to the empirical world to gain more data related to the codes and categories emerging from the data. This is called theoretical sampling, a process of “seeking and collecting pertinent data to elaborate and refine categories in your emerging theory” (Charmaz, 2014, p. 192). The strategy employs systematic data collection until no new categories emerge, achieving theoretical saturation. At the point of theoretical saturation, the researcher sorts the categories.

The term GT has a double meaning. It is an approach to formal inquiry that uses methodological yet adaptable strategies. However, GT also refers to the product of that inquiry: a theory that is grounded in the data. The notion of just what constitutes a theory has been contested by academics and practitioners alike (Charmaz, 2014). Thornberg and Charmaz’s (2014) definition that “a theory states relationships between abstract concepts and may aim for either explanation or understanding” (p. 41) is suited for GT methodologies. Theory aims to answer the question of what happens in a phenomenon or how it happens. Sometimes, it may additionally answer why the phenomenon happens. The actions and interpretations a GT

researcher employs can fall along a continuum of positivist and interpretivist traditions (Charmaz 2014). However, Constructivist GT is more aligned with interpretivism. Positivists are most interested in causes and explanations, while interpretivists seek to theorize patterns through abstract understanding.

GT is constructed as categories emerge from the data through coding, memoing, and constant comparison. A rigorous and thorough examination of inductive data leads to an understanding that will “offer an imaginative theoretical interpretation that makes sense of the studied phenomenon” (Charmaz, 2014, p. 231). Construction begins in induction and emphasizes abductive analysis and reasoning. The researcher continually returns to analysis until all the interpretations fit all the data.

Poetical Inquiry

Poetical inquiry was used in this study as a supplemental data analysis method. Poetical inquiry is a contemporary qualitative research approach that uses poetry as a means of analyzing and representing research findings. Shidmehr (2015) defined the approach as “a form of research in which at the same time as the discursive activity of inquiry takes place, lyrical and performative inquiry in the form of poetry becomes present” (p. 1). It is a creative alternative to traditional data analysis and representation in research findings. This approach emerged as part of a broader movement towards arts-based research methods in the late 20th century and represented a departure from traditional methods that rely heavily on quantitative data. It incorporates artistic and creative elements in the research process.

In 2007, the International Symposium on Poetic Inquiry marked a milestone in the development of poetic inquiry. The symposium played a significant role in legitimizing poetic inquiry as a valuable research methodology in the sphere of arts-based research (Butler-Kisber,

2020). Since then, several texts and publications have been written that formalize various approaches, practices, and examples of poetry as a tool to understand phenomena. It has been embraced in fields such as education, psychology, and sociology to explore experiences and give voice to participants' stories (Grimmett, 2016). Poetry captures the essence of human experiences and conveys findings by incorporating elements of storytelling and imagery.

Researchers who use poetical inquiry extract themes, emotions, and significant insights from data and craft poems to express these elements. One of the key principles is a "shared understanding of learning as the active co-construction of meaning developed through joint activity and language interactions" (Grimmett, 2016, p. 38). Central to that is maintaining the authenticity of participants' stories by mirroring their syntax and speaking rhythms in the poems. This approach ensures that the poems remain grounded in the participants' perspectives and lived experiences. By using poetic analysis to uncover recurring themes and employing the voices of participants, poetic inquiry allows for a more profound understanding of human experiences (Davis, 2021).

Poetical inquiry can supplement Constructivist GT in several ways, enriching the research process and enhancing the presentation of findings by providing a mechanism for representing the data, evoking emotional engagement, increasing accessibility, amplifying the voice of the participants, and supporting researcher reflexivity. While Constructivist GT focuses on developing grounded theories from qualitative data, poetical inquiry can help present those theories in a more engaging and evocative manner. Research poems, for example, can capture the essence of participants' experiences and help convey complex concepts in a more accessible way. It can evoke emotions, empathy, and resonance in readers or audiences, which provides a deeper connection to the research findings. This emotional engagement can make the research

more memorable and impactful. Further, both Constructivist GT and poetical inquiry prioritize participant voice. Poetical inquiry, through its creative approach, can further amplify the participants' voices by using their own words, stories, and expressions as the basis for research poems or narratives. This ensures that the participant perspective remains central to the research.

Poetical inquiry can also make research findings more accessible to individuals outside academia. The use of poetry and creative narratives can bridge the gap between scholarly research and the broader public. This fosters greater understanding and engagement with the research and presents stories in a more holistic way. Holistic storytelling can help researchers capture participants' emotional dimensions and unique cultural contexts. Finally, poetical inquiry encourages researchers to reflect on their own positionality and biases. This aligns with the constructivist perspective of Constructivist GT, which acknowledges the role of the researcher in shaping the research process and findings (Charmaz, 2014). The poet-researcher's choices in crafting poems or narratives can be informed by their reflexivity.

Incorporating poetical inquiry alongside Constructivist GT allows researchers to harness the power of creative expression while maintaining the rigorous and systematic approach of grounded theory methodology. It aids researchers to engage with findings on a deeper, more emotional level, making the research more relatable and impactful to both academic and non-academic audiences.

Trustworthiness

Trustworthiness in qualitative research refers to the credibility, dependability, confirmability, and transferability of research findings. It refers to the researcher's efforts to establish "a rationale for the study, a clear description of the data collection procedures and data analytic methods, and a clear description and interpretation of the data" (Williams & Morrow,

2009, p. 576). These strategies promote rigor, transparency, and credibility in the research process. Trustworthiness is often considered a parallel to the conventional quantitative research criteria of validity and reliability (Lincoln & Guba, 1985).

Credibility, Dependability, and Confirmability

Credibility refers to the accuracy and believability of the research findings. It involves establishing that the research results accurately represent the participants' perspectives and experiences. Strategies to enhance credibility include prolonged engagement with participants, peer debriefing, and member checking (Lincoln & Guba, 1985). I established trustworthiness by using member checking, thick descriptions, theoretical saturation, and iterative reflexivity. The strategy "offers depth and breadth leading to a greater understanding of the phenomenon as each research strategy used contributes a different piece to the puzzle" (Curtin & Fossey, 2007, p. 90). I used surveys and interviews to ensure that findings were consistent across data sources. Member checking was also utilized. Member checking involves asking participants to verify the accuracy of findings. This activity "is a way to ensure that the researchers' interpretations honor the meaning as conceived by the participants" (Williams & Morrow, 2009, p. 579).

In Chapters 4 and 5, I provide *thick descriptions* of the research context, participants, and data to demonstrate that the findings are grounded in the data. The term was first used by Geertz (2003) to refer to the detailed, comprehensive, and contextualized account of a particular phenomenon. Geertz (2003) stated that a thick description goes beyond a literal description of the surface level, including the meanings, intentions, and cultural context of the event or behavior.

Dependability refers to the consistency and stability of the research findings over time. It involves ensuring that the research process is transparent and that the results are replicable. This

study utilized techniques for enhancing dependability, including an audit trail (Merriam, 1998), which documents the research process in detail. The triangulation process already described also supported dependability. In addition, theoretical saturation means collecting data until no new information or insights are generated (Charmaz, 2014). This ensured that the findings were comprehensive and representative of the studied phenomenon.

Confirmability refers to the objectivity and neutrality of the research findings. It involves demonstrating that the results are based on the participants' experiences and perspectives rather than the researcher's biases or preconceptions. Strategies I used to enhance confirmability included maintaining a reflexive journal and audit trail (Lincoln & Guba, 1985).

Researcher Bias and Assumptions

My constructivist paradigm requires reflexivity to consider my positionality, perspectives, and experiences. Reflexivity refers to the researcher's efforts to become aware of how their unique self-composition may impact the research process and findings (Roulston & Shelton, 2015). The constructivist approach means "researchers must examine rather than erase how their privileges and preconceptions may shape the analysis, but it also means that their values shape the very facts that they can identify" (Charmaz, 2014, p. 13). Reflexivity is an ongoing process that I will represent from two perspectives: (1) as the pre-data collection and analysis researcher and (2) as the post-data collection and analysis researcher. Social constructivists maintain that knowledge generation occurs through social interactions with others and that these exchanges and the resulting knowledge are reliant on the specific context in which they take place (Charmaz, 2014; Elliott et al., 2000; Fox, 2001; Garrison, 1997; Phillips, 1995). As I considered my positionality, I documented my thoughts and feelings in notes and preparatory assignments along the way. I have also used bracketing, a technique where the

researcher journals known biases (Williams & Morrow, 2009). Bracketing helps the researcher recognize that “the knowledge we take into the field and gain from it typically differ from that of our participants” (Charmaz, 2014, p. 23). The main bias I wrote about is my assumption that the trainer certification process generates transformative learning. I hold many beliefs and assumptions about learning and change. I believe learning and transformation are individual experiences propelled by prior and current experiences. My personal and observed experiences have also led me to believe that learning experiences that challenge formerly held beliefs often produce the most significant degree of change. I also assume that supportive professional developmental relationships, such as mentors and coaches, support radical change.

I have worked and studied in education, coaching, training, and adult development for over twenty years. As an undergraduate in a K-12 education program, I studied foundations of education, educational psychology, curriculum and instruction, assessment and evaluation, and classroom management. During that time, I also had early career experiences in early childhood development, technical assistance and coaching, and organizational development. Since earning my bachelor’s degree, I have held various positions where I created and facilitated many learning and development experiences for others. In 2017, I was accepted as a trainer candidate into the certification program I intend to study. My certification experience propelled me to return to school to earn my master’s degree in education and become a doctoral candidate. The certification process inspired me to supplement my years of practical training and development experiences with academic and theoretical frames of reference. My transformative experiences in that certification program made me curious about other trainers’ experiences. I hold many beliefs and assumptions about learning and change. I believe learning and transformation are individual experiences propelled by prior and current experiences. My personal and observed experiences

have also led me to believe that learning experiences that challenge formerly held beliefs often produce the most significant degree of change. I also assume that supportive professional developmental relationships, such as mentors and coaches, support radical change.

I am a cisgender white woman from a middle-class socioeconomic background. I assumed the People of Color who participated in my study have had more experiences, and likely negative experiences, related to race. Additionally, only three potential study participants were male. Across the field of home visitation, most individuals are women. In various gatherings (meetings, trainings, social events), male members stand out and are often asked their opinion as though it is representative of all men. This made me wonder what males who participated in my study might share related to their gender.

My extensive adult learning and development work influenced how I interpreted the data. Furthermore, I had dual positions in the context of the research study. As a member of the trainer professional development system I studied, I am an insider. I also hold a position of authority in the system, which also locates me as an outsider. As a researcher cannot be an objective external observer, I was comfortable acknowledging what I brought into the study. However, I kept my positionality close to the surface of my consciousness and used that awareness to mindfully interpret the data, continually considering how my personal lens influenced findings and connections. I was particularly sensitive to what my insider-outsider status influenced me to ignore or minimize in the data collection and analysis processes.

In my study, I expected to see reflections of adult learning, transformative, and developmental theories or frameworks. However, I assumed that those theories separately would be insufficient to explain all the complexities of trainer learning and transformation experiences in the development system I planned to study. I was most interested in the ‘constructed’ aspect of

Constructivist GT; I wanted to immerse myself in the words that people use to describe their experiences. In alignment with constructivist approaches, I believe that multiple realities can and do exist as constructed by individuals through interaction with others and the world around them. Furthermore, the reflexivity mandated by Constructivist GT recognizes the impossibility of completely divorcing the researcher from the research yet expects biases and assumptions to be made explicit in developing emerging theory. I acknowledge the influence of my ideas and cognitive style on the analysis and synthesis of data.

Before undertaking a formal inquiry, researchers should examine their epistemological perspective, the purposes of the study, and influential theoretical and foundational frameworks. I began this chapter with a brief explanation of my proposed study and described the context of the study and participant selection. I then traced the roots of Constructivist GT, outlined the methodology's assumptions and core guidelines, and the fit with my paradigm. I ended by describing my sample selection, data collection, trustworthiness, and researcher bias.

Chapter 3 Conclusion

This chapter provided a comprehensive overview of the Constructive GT as the research methodology and approach used in this study and focused on SI as the foundational theoretical orientation. Data collection procedures, analytical approaches, and considerations regarding researcher trustworthiness and bias were described. Semi-structured interviews conducted via Zoom were used to collect data and provided an in-depth exploration of participants' experiences. The interview protocol was developed iteratively and evolved to improve participant understanding and deepen the richness of the data. Memos were used before and after each interview to record expectations, initial connections, and insights. Poetical inquiry was introduced as a supplementary tool for analysis. I acknowledged my assumptions and biases and

planned strategies to mitigate them. The combination of Constructivist GT and Symbolic Interactionism offered a robust framework for exploring participants' experiences and co-constructing theory.

CHAPTER 4

FINDINGS

This chapter describes the qualitative data collected using a constructivist grounded theory (GT) and poetical inquiry methodology to understand how learning and transformation were experienced by trainers who completed a professional development certification program. The guiding research question asked:

1. What are the learning experiences of trainers who have completed a professional development certification program?

Additional questions that supported data collection and analysis included:

2. How do trainers describe their learning experiences?
3. What catalysts or triggers do they identify as instrumental to their learning?
4. What is the nature of the developmental relationships that support the learning experiences of these individuals?

In this chapter, I first provide a synopsis of the study background and context. I then summarize my theoretical orientation, data collection procedures, analytical approach and rationale, and the relationship between researcher and participants in the research.

Participants' educational and career backgrounds are described. I then outline themes and sub-themes related to the participants' experiences in the trainer certification process and discuss how they relate to each research question. The chapter ends with a summary of the findings.

Background and Context

Although trainers in PD systems are tasked with helping others increase skills, growth, and competence, it is often unclear how the trainers' own learning and growth are experienced. In a trainer's journey, the selection of meaningful learning formats, activities, and resources is critical. One of the most challenging obstacles in trainer PD is carving out time for trainers to participate in learning sessions, workshops, or developmental initiatives (Glerum et al., 2021). The financial aspect further compounds the issue, especially for smaller organizations. Expenses for trainer development include salary, materials, travel, and technology costs, potentially hindering the provision of opportunities. Consequently, trainer development is often a lower priority in organizations (Guskey, 2002). Instead, organizations look to hire trainers who have experience and competence in the subject matter rather than investing in ongoing trainer development. This can result in trainers who are subject matter experts (SMEs) entrusted with creating and facilitating learning activities despite often lacking expertise in essential instructional design or adult learning skills.

This study contributes both theoretically and practically to the fields of adult learning and professional development, specifically trainer development. The findings supplement the current understanding of how adult learning principles and developmental relationships in trainer PD systems can propel individual professional growth and transformation. The significance of this study lies in its contribution to improving PD systems by addressing the challenges that PD content developers face in creating meaningful learning experiences for employees. Recognizing the pivotal role of professional development in skill enhancement and perspective transformation, this study aimed to unravel the learning experiences of certified trainers, thus providing invaluable insights for enhancing the effectiveness of professional development

programs and nurturing the developmental relationships that buttress these learning journeys. Additionally, the study's methodology emphasizes the importance of the learner's experience and understanding of the learning process, which can inform the development of PD programs that are tailored to individual learners' needs. The findings from this study also have the potential to inform the development of PD programs in other organizations and sectors, as the challenges and opportunities for PD are not unique to the context of this study.

The setting of this study centers on a Trainer Professional Development System (TPDS) operating within an international non-profit organization dedicated to furnishing training and service delivery resources to family-support professionals who utilize a home visitation model. Within this complex system, certified trainers facilitate core training courses to certify home visitors. Trainer certification is obtained through a formal development process designed to identify and improve facilitation skills, knowledge, and behaviors. In this certification process, trainers journey through distinct developmental stages: application, qualification, candidacy, certification, mentorship, annual growth plans, and formal recertification. Throughout, a cadre of experienced and highly skilled Trainer Development Specialists (TDS) adopt a coaching approach to facilitate trainer growth. Together, trainers and TDSs "set learning and teaching goals, present content, reflect on the learning process, partner with others, and facilitate their own learning experiences and the learning experiences of others" (Parents as Teachers, 2016c, p. 1).

Researcher-Researched Relations

I was an insider in the context of this study. Being an insider refers to a researcher who has a close connection with the community, group, or context being studied (Dwyer & Buckle, 2009). This insider status typically means that the researcher shares some degree of membership

or familiarity with the community's culture, practices, and norms under investigation. As an insider, I had easy access to participants. The organization's leadership supported my research purpose and thus gave me unfettered access. Additionally, I have completed the trainer certification myself. Having this shared experience with the participants helped me establish trust and rapport. Participants would often say something similar to, "You know what that's like." The participants seemed to trust that I understood their experiences and could relate to complicated feelings and resulting complexities in development. In addition, I have a deep understanding of the cultural nuances, language, and context of the study's setting. This knowledge helped me to navigate the interviews and avoid misinterpreting contextual cues. Our shared culture allowed me to ask probing questions, leading to richer and more insightful data.

Although an insider status offers several benefits, I also had to consider potential drawbacks to my position. Before the study, I knew each participant. I held conscious and unconscious assumptions about who they were and how they had experienced certification. Our relationship could also have made them reluctant to share negative experiences. I had to consciously maintain distance and objectivity by balancing my role as an insider and the role of an objective researcher, aiming to understand the participants' experiences authentically. Overcoming this challenge required a heightened awareness of my biases and preconceptions and a commitment to setting them aside during data collection and analysis.

Being an insider in a qualitative study can offer unique advantages, such as improved access, trust, and cultural understanding, but it also brings challenges related to objectivity and bias. Having addressed the implications of my insider status and the associated limitations, I will now delve into the specifics of the study participants and the site where this research was conducted.

Study Participants and Site

Participants were chosen from a cadre of 70 trainers in the TPDS. All members of the cadre have completed at least one trainer certification process. None of the trainers conducted training full-time for the organization. Some are adjunct trainers, while others are trainers within a system of state offices. Approximately 60 trainers work full-time jobs outside of their trainer responsibilities. Eligible participants were those who completed the trainer certification process at least one year before the start of the study and within the last ten years and were still members of the associated TPDS. My research interests were not tied to any preset trainer characteristic (e.g., gender, age, background), so I did not have other eligibility criteria. The TPDS was selected as the research site owing to the researcher's access and familiarity with the organization, system, and certification process. The organization gave me permission to access potential participants through the organization's official communication channels. This access signaled to participants that the study was credible and potentially offered valuable learning. Additionally, my research questions were very specific to the context of this PD system. Thus, no other site would be acceptable.

I recruited participants by sending an email invitation to all trainers (n=70) in the cadre. The email explained the purpose of the study, eligibility requirements, what participation in the study would require, and potential benefits or risks. Ten trainers responded to the invitation and agreed to be study participants. These trainers were included in the study because of their willingness to participate, their status as certified trainers who completed certification within the last ten years, and their expressed openness to sharing both positive and negative experiences. Each participant reviewed and signed an informed consent.

Throughout the remaining chapters, participants will be identified by a number from one to ten. The numbering of participants has two purposes. First, it is a simple way to refer to participants individually without betraying confidentiality. The second reason is to indicate a progression in the data collection and analysis. As a constructivist, I recognized and honored the influence each participant's data had on subsequent participants. This interaction is inescapable and may be of interest to readers in understanding the interpretation of study findings.

There were less than 60 trainers who qualified to participate in this research. Thus, to protect their identity, I have provided limited descriptions. Table 4.1 provides an overview of participant characteristics. I chose to name participants by number in the order they were interviewed to provide the reader with a sense of progression in the interviews.

Table 4.1

Participant Descriptions

Participant	Race	Gender	Age	Year Certified	Degree
1	Mexican American	Female	40s	2018	Master's
2	White	Female	30s	2017	Bachelor's
3	Black	Male	30s	2022	Master's
4	White	Female	40s	2022	Bachelor's
5	Mexican American	Female	40s	2015	Master's
6	White	Female	40s	2022	Bachelor's
7	White	Female	50s	2020	Bachelor's
8	White	Female	50s	2021	Bachelor's
9	Black	Female	50s	2022	Bachelor's
10	White	Female	40s	2015	Master's

Participant 1

Participant 1 is a Mexican American, cis-gender female in her 40s. She went through the trainer certification process five years ago. She speaks English and Spanish fluently. Her background is in early childhood education. She has a master's degree.

Participant 2

Participant 2 is a White, cis-gender female in her 30s. She went through the trainer certification process six years ago. She speaks English fluently and some Spanish. Her background is in early childhood education. She has a bachelor's degree.

Participant 3

Participant 3 is a Black, cis-gender male in his 30s. He went through the trainer certification process one year ago. He speaks English and has a background in psychology and community support. He has a master's degree.

Participant 4

Participant 4 is a White, cis-gender female in her 40s. She went through the trainer certification process one year ago. She speaks English. Her background is in early childhood education and family support. She has a bachelor's degree.

Participant 5

Participant 5 is a Mexican American, cis-gender female in her 40s. She went through the trainer certification process eight years ago. She speaks English and Spanish. Her background is in early childhood education and family support. She has a master's degree.

Participant 6

Participant 6 is a White, cis-gender female in her 40s. She went through the trainer certification process one year ago. She speaks English. Her background is in early childhood education and family support. She has a bachelor's degree.

Participant 7

Participant 7 is a White, cis-gender female in her 50s. She went through the trainer certification process three years ago. She speaks English. Her background is in early childhood education. She has a bachelor's degree.

Participant 8

Participant 8 is a White, cis-gender female in her 50s. She went through the trainer certification process two years ago. She speaks English. Her background is in early childhood education. She has a bachelor's degree.

Participant 9

Participant 9 is a Black, cis-gender female in her 50s. She went through the trainer certification process one year ago. She speaks English. Her background is in early childhood education and family support. She has a bachelor's degree.

Participant 10

Participant 10 is a White, cis-gender female in her 40s. She went through the trainer certification process eight years ago. She speaks English. Her background is in early childhood education. She has a master's degree.

Sample Analytical Process

To illustrate my analytical process, I describe here the method I employed for one participant. The participant worked full-time for a state home-visiting organization and went through the trainer certification process approximately 3 years before the study. In their state role, they provided training and technical assistance to family support providers across the state.

Before the interview, I recorded a memo reflecting on what I already knew about the participant and some of the things I anticipated they might say. The participant's professional journey was like mine in several ways, and I wondered what resultant assumptions I might make about their

experience. I pondered whether they would describe their experiences significantly differently from others since they completed their certification at an older age than most of their peers. Another consideration I had was how their social connections might have impacted their experiences. They were geographically isolated from other trainers and had no significant relationship with most of them before she was certified. Immediately after the interview, I recorded another memo. I noted some of the main themes that already stood out to me such as: the nature of facilitators; peer learning and support; parallel process; and discomfort as a means of learning.

That evening, I conducted initial coding using their transcript. First, I reformatted the transcript from a text file into a Word document so that interviewer and participant dialogue was separated more clearly. Questions were bolded and offset from responses. I then used the yellow highlighter function to mark words and phrases that seemed meaningful. For this initial coding, I did not try to sort or categorize anything. Initially, it was challenging not to mark almost everything because all the content seemed relevant. I then remembered Charmaz's (2014) advice to look for gerunds. This tip helped me see more clearly how the participant described their experiences. Another thing that helped was posting my research questions above my desk as a reminder of my purposes.

In addition to the codes I mentioned from my post-interview memo, some of the codes initially identified included learning through observing, jumping in fully, expectations about the process, underestimating the process, certification being intimidating after starting, having passion, misconceptions, and partnership. There were so many things that felt important. I recorded a memo about feelings of frustration and thought *if everything is important, then nothing is*. I put the codes away for a couple of weeks and then did another round of coding. This time, I considered how the codes were related and what patterns might be in the data. I began drawing out mind maps on scrap paper to organize my thoughts. Seeing the codes in this way helped me to restructure them. I combined some codes and created separate categories for others. For example, I started out with all

codes related to peers in one category (i.e., peers). However, the more I played with the data, I realized there were two distinct themes: peer learning and formal developmental relationships. Peer learning was specifically about the learning that happened in conversations within different relationships, while the formal relationships were characterized by shared responsibility and formal support. Another example of reorganizing codes is combining the codes *reflection* and *observation*. As I reviewed the way observation was described by the participant, it became clear that this was a type of reflection. Table 4.2 provides an overview of the main codes identified and supporting words or phrases.

Table 4.2

Participant 1 Codes with Supporting Words and Phrases

Peer learning	Expectations	Overwhelm/ Struggle	Parallel process	Reflections	Partnership/ support	Identity
Trainer Development Specialists Mentors	Underestimated the process “I realized that was different”	“It was a little shocking” “It’s not just the content”	Trainer → training participant Supervisor → family support worker	Journaling Debriefs	Partnering “What would you think about looking at these?”	“Visual learner” Worked in court system
Other trainers, co-facilitators	“So different from what I’ve experienced”	“...forced me to slow down”	Home visitor → parent	Before action, in action	“You’re doing it together. It’s not, ‘Okay. You do this, and I do that,’ and that’s it”	facilitator
Peers outside the TPDS	“I went in thinking I would have to conform”	Lack of confidence	Parent → child	“I’m gonna try this and then to reflect on it”	“Brings down the anxiety”	straightforward
“You’re never really alone”	“Not knowing there were competencies”	“Just let him let him struggle because he’ll gain so much more through that struggle”	“You’re the supervisor, you have to share this”	“Think about why I do what I do”	“Oh, I need some help”	“I like to fix things. I like to help.”
Training dept leadership	“I wanted to be successful and not get frustrated”	“...something beautiful came out of that”		Observation	“...they didn’t want me to be someone I wasn’t”	“I can be me”
Feedback		“It was heavy”		“How do I think I’m going to do that?”	“Helping me navigate”	

Peer learning	Expectations	Overwhelm/ Struggle	Parallel process	Reflections	Partnership/ support	Identity
Monthly meetings, workspace, annual conference		<p>“I really like to step out of my box every so often, because I think that’s when we learn the most”</p> <p>“...they’ll figure it out on their own, and I have to be patient with them”</p>		<p>“sharing some of those competencies with my coworkers when... I see that they’re struggling”</p> <p>“You just become very honest with yourself”</p>	<p>“I don’t know if it’s gonna work, but I’m gonna try it”</p>	

After at least four rounds of coding the transcript, I created a poem constructed wholly from words and phrases the participant used. For this study, poetical inquiry was used for three purposes. First, it was a reflective activity to see if I could capture the essence of the participant’s story. Next, it was a way to check if I could see the codes I identified represented in the poem. If not, I needed to recode. Lastly, I used the poem to present the data back to the participant and check for accuracy. Poetic inquiry became an emotional part of the analysis. It was rewarding to see the themes take shape in an artistic representation.

This section explored the intricacies of the analytical process for understanding the experiences of trainers in a professional development certification program. The next section will introduce the study’s prevailing theme and core themes that encapsulate the transformative journey of trainers as they navigated the certification process and experienced personal and professional growth.

Findings: Prevailing Theme and Core Themes

In constructivist grounded theory, a prevailing theme is a central or overarching concept or idea that emerges during the data analysis process. It represents a fundamental aspect of the phenomenon under study and often serves as a unifying thread that ties together various sub-

themes or concepts within the research (Charmaz, 2014). The prevailing theme provides a deeper understanding of the phenomenon and helps to organize and structure the findings of the study into theory.

The research question for this study was “What are the learning experiences of trainers who have completed a professional development certification program?” After analyzing the data collected through semi-structured interviews, the core theme Professional Development Components for Learning and Transformation in a Trainer Certification Process emerged. The core theme revolves around the experiences, challenges, and growth related to the professional development activities of the trainers who completed the certification program. It also considers the role of individual experiences and characteristics in the equation. This overarching theme reflects the journey of individuals as they undergo training, enhance their skills, face various obstacles, and ultimately transform personally and professionally through the learning process.

In the early stages of the certification process, most trainers felt disoriented and wanted to quit. As they gained experience, their confidence and competence increased. Each trainer reported that around the midpoint of the certification, they were able to lean into the process fully. All participants described the certification process as intense, overwhelming, and transformative. In table 4.3, the findings across these experiences are represented by core themes and sub-themes.

Table 4.3*Overview of Findings by Theme and Sub-Findings*

Thematic Findings	Sub-Findings
Learner identity strongly influenced how trainers experienced certification.	<ul style="list-style-type: none"> • Trainers were motivated to become part of the existing trainer professional development system. • Culture and diversity were stronger factors for trainers from minority groups. • Self-concept and prior experiences influenced trainers' expectations for the certification process. • Trainers found alignment with systemic values and beliefs guiding the process.
Process structure and concrete resources provided trainers a pathway through certification experiences.	<ul style="list-style-type: none"> • Trainer competencies outlined the behaviors and skills expected of new trainers. • Scaffolded activities presented increasing responsibility and opportunities to practice. • Written reflection through documentation and journaling supported self-awareness and reflective praxis. • Ongoing professional development opportunities extend learning and build community.
Learners actively engaged in and partnered to design their learning experiences.	<ul style="list-style-type: none"> • Reflective praxis increased self-awareness and introspection on behaviors, beliefs, and values. • Trainers used increased self-awareness to apply new learnings and practice skills.
Adversity was managed and ultimately had positive effects on learning and growth.	<ul style="list-style-type: none"> • There were gaps between trainers' expectations and experiences. • The process was intense, and many trainers felt a desire to quit at some point. • Discomfort was attributed to the rapid learning curve and volume of responsibilities. • As they persisted, trainers adapted and gained confidence.
Developmental relationships were paramount in learning and transformation.	<ul style="list-style-type: none"> • Trainer Development Specialists (TDS)/Mentors played a significant role in building trainers' confidence to overcome challenges. • Feedback was viewed as a tool for learning and development. • Perceived levels of psychological safety strongly influenced relationships. • Authenticity and representation were encouraged in the developmental relationships.
Formal and informal peer learning promoted collaboration and mutual exchange of ideas.	<ul style="list-style-type: none"> • Peer learning established a strong sense of a supportive community.

Thematic Findings	Sub-Findings
	<ul style="list-style-type: none"> • Interactions helped trainers navigate challenges and reduce anxiety. • Formal and informal peer observation of peers serve as a rich source for new ideas and connections.
Trainers self-identified transformation and growth as a result of certification experiences.	<ul style="list-style-type: none"> • Trainers experienced changes in values, behaviors, and self-concepts. • Certification generated a strong sense of accomplishment. • Trainer experiences cemented a commitment to lifelong learning.

Categories representing trainers' experiences were identified through focused coding. In constructivist grounded theory, focused codes are a key element of the coding process (Charmaz, 2014). They are selected and prioritized based on their significance, relevance, and theoretical importance in understanding the research topic. These codes play a critical role in developing a deeper understanding of the data and in organizing the emerging theory. Focused coding connects specific concepts, relationships, and insights within the data, thereby contributing to the development of a conceptual framework that explains the phenomenon under study. The categories that emerged through focused coding are Learner Identity, Learner Motivation, Value in Struggle, Process and Resources, Developmental Relationships, Peer Learning, and Learner Practice. These core themes will be described in the following pages. Table 4.4 presents a map of the theme development supported by four categories with associated codes.

Table 4.4

Coding Map for the Prevailing Theme: Professional Development Components for Learning and Transformation in a Trainer Certification Process

Categories						
Learner Identity:	Process & Resources	Learning Application	Adversity & Perseverance	Developmental Relationships	Peer Learning	Transformation & Growth
<i>an individual's perception and sense of self in the context of learning and education</i>	<i>formal framework and materials designed to support trainer certification</i>	<i>active involvement of individuals in the learning process</i>	<i>discomfort & trainer persistence</i>	<i>formal support from Trainer Development Specialists and Mentors</i>	<i>knowledge transfer & practice with colleagues & training participants</i>	<i>self-identified changes in identity, values, practice</i>
Codes						
Culture Context	Scaffolding Forms	Intrinsic motivations	Intensity Dilemma	Coach Trainer	Peer Colleague	Change: values, self-concept, behaviors
Self-concept	Competences	Extrinsic motivations	Challenges	Development Specialist (TDS)	Collaboration Ongoing support	Transformation Growth
Self-efficacy	Trainer resources	Reflective practice	Expectation gaps	Mentor Feedback	Knowledge exchange	Lifelong learning
Values	Workspace	Documentation	Discomfort Persistence	Reflection Planning	Community Interactions	Learner mindset
Beliefs	References	Journaling	Perseverance	Assessment Safety	Observation Resource sharing	Sense of pride
Prior experiences	Training materials	Lifelong learning		Partnership approach		Renewal
	Level 1	Autonomy		Encouraged autonomy		
	Level 2	Competence Application		Quality		
	Mentoring phase	Practice		Generate awareness		
	Trainer meetings	Seeking partnerships				
	Professional development	Learning focus				
	Book clubs					
	Learning groups					

The prevailing theme and associated categories informed the creation of an initial diagram of the relationships between the core themes, shown in Figure 4.1. This theoretical map helps describe the trainers' experiences as they progressed through the trainer certification process and the ways their self-identified learning and change have been sustained through the trainer community. It illustrates the relationships between axial and selective codes that led to the development of the prevailing theme.

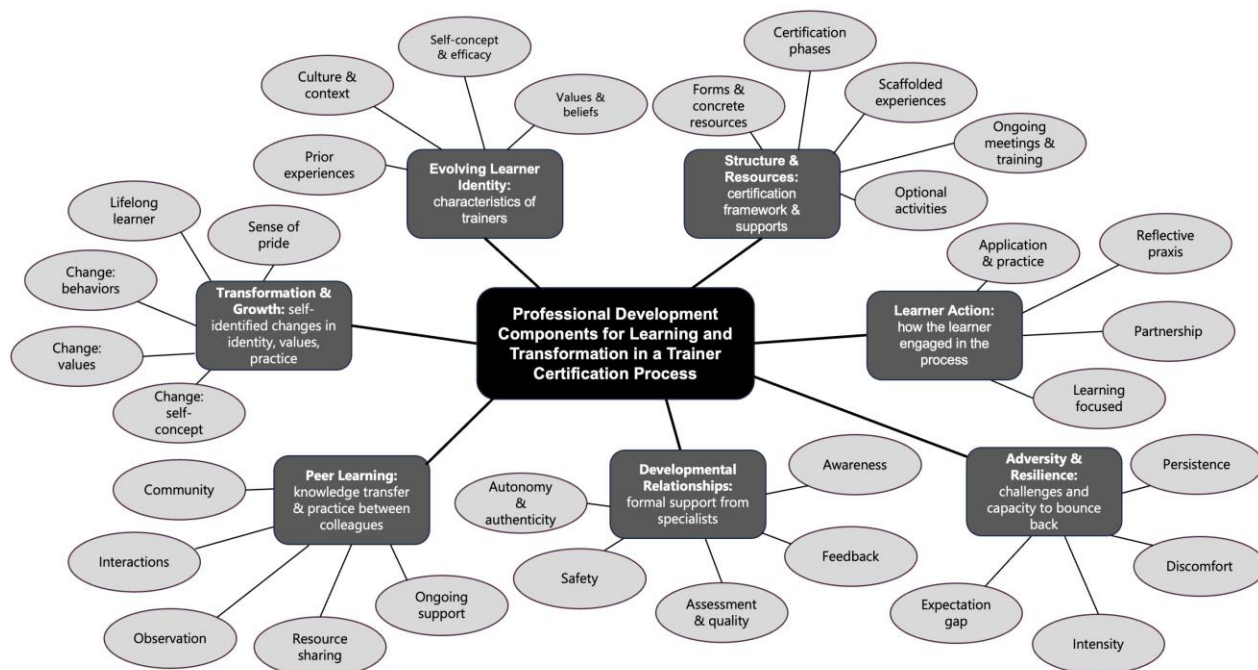


Figure 4.1

Prevailing Theme, Core Codes, and Subcodes

Theme 1: Learner Identity “I Always Want to Do Better”

Learner identity refers to an individual’s perception and sense of self in the context of learning and education. It encompasses the beliefs, attitudes, values, and self-concept that a person has about their role as a learner. Learner identity is influenced by a variety of factors, including cultural background and social context, motivations, self-concept, and prior personal and educational experiences.

Learner Motivations “I Wanna Be Part of That Team”

Learner motivation pertains to the factors that drive an individual to engage in learning activities, persist in the face of adversity, and work towards achieving their goals. Motivation involves the reasons and incentives that influence a person to participate in learning, such as curiosity, desire for success, interest in the subject matter, or the approval of others. Some

motivations are primarily intrinsic or come from within the individual, while others are more extrinsic from external rewards or influences.

Participants shared a variety of intrinsic motivations. Participant 8 was motivated by a sense of choice and adventure and felt the certification training was aligned with their values. They explained, “I just fell in love with everything that it [the certification training] was and what it stood for. So, I thought, I wanna be part of that team.” In similar ways, Participant 1 and Participant 4 were motivated by pleasure. Participant 1 stated, “I really enjoyed the training that I did before, and I enjoy being creative,” and Participant 4 shared, “I just find joy in learning new things.” The excitement Participant 2 found in peer learning is what “motivated me to keep growing.” Some trainers expressed curiosity about the certification process. Participant 7 believed, “Oh, that’d be fun!” while Participant 4 thought, “It’s the curiosity that keeps me going.”

Many of the participants were motivated by the desire to become better trainers and facilitators. Participant 6 claimed to “have the motivation because I don’t like to do things poorly. I always want to do better and improve and grow.” They continued, “It’s part of...working on myself and getting myself out there.” Participant 8 said they “want to give it my best...I value education as an adult learner.” A few trainers were motivated by the belief they had something unique to offer participants. Participant 3 wanted to share their perspective as a man and father. Participant 3 and Participant 9 wanted to represent their perspective as People of Color. Participant 1 wanted to share their learning by “start[ing] with the next generation of administration being about to train from what I’ve learned.”

Participants also had many extrinsic motivations. The most frequent external motivation was earning the approval or respect of others. Participant 4 had a person in leadership say, “Why

don't you do this?" Participant 3 believed their colleagues regard certified trainers in high esteem. They imagined people would say, "That is somebody that's committed. This is somebody that is dedicated. And that's somebody that's gonna put in the work from the jump." Credibility was also important. Participant 3 wanted "people to view me as an expert." Participant 8 wanted "to study and...know what I'm saying."

Several participants were encouraged or required by supervisors to become certified trainers. Participant 7 stated, "That was one of the things my supervisor wanted me to do." A supervisor told Participant 6, "I really want you to apply for this. I really think you'd be good at it." When asked why they wanted to become a certified trainer, Participant 2 said, "My boss [laughed]. I would go so far as to say this was not some that I had seen on my horizon."

Others were motivated by wanting to meet the needs of learners. Participant 3 declared, "You know, it's so important that these participants get what they need." They continued, "You have to figure it out so that then you can share it." Participant 9 emphasized, "For me, the thing I value the most...is to facilitate learning so that the participants can get the most out of the training." Participant 1 stressed the importance of being proactive because "much of the training I did was a response to a particular behavior or a response to a need within the organization. So there was a crisis."

Another motivation was career development and satisfaction. Participant 9 shared getting certified was "also just something else to, you know, add to my resume honestly." They could "see [themselves] in the future focusing more on training [rather than other professional activities]." Participant 2 believed becoming a trainer would provide an opportunity to do more. They explained, "It makes you feel like, okay, one day I'm gonna have an opportunity to mentor someone else that came in just like me."

Culture, Diversity, and Shared Power “There Were Not, You Know, a Lot of Trainers of Color”

In interviews with participants, the only references to gender, race, or ethnicity were from participants Participant 1, Participant 3, and Participant 9. Not coincidentally, these participants are all members of underrepresented groups in the trainer cadre. Their comments focused on their value of representation, revealing a desire for more diverse representation and a recognition of the importance of having trainers who share similar characteristics or backgrounds as underrepresented training participants. Participant 3 noted that, as a Black male, he is “always looking at it from a different lens.” When contemplating becoming a trainer, Participant 3 recalled thinking, “Hey, man, it’d be cool if a guy like me” became a trainer, specifically stating:

When I looked around and seen that it was dominated by women, I said it’d be kinda cool to get a dad’s perspective or guy’s perspective on this and put that lens on it. And I’ll just see what’s the outcome as far as those participants and learning.

Participant 9 shared, “That was really my first intention [for becoming a trainer] ...over the years of seeing trainers and talking to trainers. They were not, you know, a lot of trainers of color.” This statement reflects Participant 9’s long-standing awareness of the lack of diversity among trainers and their personal intention to address this issue. Participant 9 continued by noting their rationale for increased representation: “So, of course, we know that studies show that learners, they do better when they have a person that looks like them.” They also emphasized their desire to share their expertise and provide a role model for participants who share their racial or ethnic background by stating, “You know, [it’s] the opportunity to share some of [my] knowledge and just have an opportunity to have participants have a trainer that looks like them.” This underscores the importance of diverse representation among trainers for the benefit of learners.

Similarly, Participant 1 highlighted their awareness of training participants' cultural and language differences and the impact of those differences on training outcomes. They stated, "There was a cultural impact when we shifted and started working with our Spanish-speaking participants."

For Participant 10, inclusivity and equal access were important. They valued inviting in all to the learning experience. They said:

And this is all I think, things we talk about when we're talking about you know how people learn and all of that. But it's [the information] for everyone, and it's for everyone to be able to do what they need with it. And so, you know, not holding anything back in terms of information or honesty about what it's going to feel like to do the work from my perspective. Just really the democratization of the information.

This suggests Participant 10's commitment to inclusivity, recognizing that people from various backgrounds can benefit from learning and training. By "democratizing" content, Participant 10 aims to make information accessible to all participants on an equal basis through transparency and honesty. This intent highlights their desire that no one is excluded or disadvantaged based on their background or characteristics. Participants 1, 3, 9, and 10 specifically expressed a commitment to promoting diversity, representation, and shared power in trainings.

Self-Concept "I Don't Even Think of Myself as a Trainer"

The participants' comments provided insight into their evolving self-concept and how they perceived themselves in their roles as trainers. Several trainers expressed initial self-doubt and uncertainty about their capabilities as trainers. For example, Participant 2 shared, "Maybe I didn't consider myself to have those skills." Likewise, Participant 5 acknowledged, "I remember just being like super, super nervous. I just get a knot in my stomach." They went on to express

doubt about their place in the trainers' cadre: "This is like a tight group of ladies. They've known each other a long time, and I was really like, oh I don't know [if I belong]." Participant 2 shared a similar concern: "I think at my first or second trainers' meeting, I remember walking into the room and feeling initially, thinking, like am I cut out for this?"

Participant 6 and Participant 7 had to work hard to feel ready to be a trainer. Participant 6 stated, "I always said I would never train. I generally have been very quiet and shy," and Participant 7 said, "I guess I don't even think of myself as a trainer." Participant 10 emphasized several times, "I am not the expert." Before becoming certified, Participant 2 observed another more experienced trainer feel overwhelmed in the certification process. She disclosed, "So I kind of, I think, saw that the process was really intense for someone with a lot of experience. I felt not super prepared."

Despite their doubts, research participants demonstrated a willingness to learn and adapt to their roles as trainers. Speaking of beginning the certification process, Participant 8 divulged, "And I'm like, I don't know. But, I mean, I won't know unless I try." They went on to share, "I'm a lifetime learner, you know, and I'm always up for a challenge." Participant 4 felt confident: "I believe in my ability to succeed...When I set my mind to something, I usually achieve it."

Referring to starting certification, Participant 7 thought, "Oh, that'd be fun!" Participant 7 shared, "I think I've always want to be a trainer, in the back of my mind."

Values and Beliefs "It's Important to Me to Know What I'm Talking About"

In interviews, participants shared the values and beliefs related to their identity as trainers and learners. Their words reflect themes of learner-centeredness, empowerment, respect, and shared responsibility. Several participants emphasized the belief that each learner is responsible

for their own learning and growth. This learner-centered perspective values personal agency and the learner's ownership of the learning process. It also highlights the participants' personal investment in education as adult learners. Participant 3 believed in "just doing your part, you know, hold your own, making sure you are prepared." Participant 8 also emphasized the value of being prepared: "It's important for me, as a person, as a trainer, to know what I'm talking about. To be vested in it."

The participants want to create an environment where each person, including the trainer, is treated with respect and takes their own learning seriously. Participant 9 believed in being adaptive to learners, stating, "I think me being the type of person that I am, you know, I can work with different styles." Participant 3 simply said it is about "being respectful," and Participant 4 claimed, "I want to treat others how I would want to be treated." Participant 7 declared, "I think that's the value I carry, that each person is responsible for their own learning and knowledge."

In association with learner responsibility, the participants expressed a commitment to empowerment and partnership. This suggests a belief in the importance of fostering a sense of autonomy and individual engagement in the learners. Describing shared responsibility, Participant 5 asserted, "I think that it's believing that the learners have...a partnership. That I have some ownership of their learning experience, and they have ownership of that learning experience." Participant 7 said, "That empowerment is more important to me than just solving the issue and moving on."

Almost universally, the participants saw themselves as facilitators of new information and skills rather than instructors. Some trainers expressed a desire not to be viewed as the expert in the room. This suggests humility and the value of collaboration. Participant 2 stated, "I feel

like I'm the facilitator of maybe some new information or skill, processes, details." Speaking of participants' perception of the trainers' role, Participant 10 shared, "I really don't want people to view me as an expert." Participant 5 described this as "being the guide on the side, not the sage on the stage." They believe "people can learn with each other, alongside each other, and talk about their experiences." The facilitator role was seen as a means to transfer knowledge, practice skills, and encourage collaboration.

Additionally, participants expressed a desire to create and deliver effective learning experiences to ensure learners get the most out of the training. Participant 1 shared, "I felt like, you know what? I want to share more. And I think good training is the way to do that." Thinking of all the individuals in the learning event, Participant 4 stated, "I really want everyone to have a great experience." Participant 9 said, "For me, the thing that I value the most as a trainer, is to facilitate learning so that the participants can get the most out of training." These comments reflect a commitment to the quality of learner experiences.

Prior Experiences "I Had to Figure It All Out"

Participants' prior experience provide an understanding of the evolution of their identity. They came from diverse training backgrounds that vary in terms of content, context, and formality. Several participants were steeped in early childhood education, while others had previous experience with adult learners. For Participant 2, Participant 3, Participant 8, and Participant 9, their primary facilitation experience before the certification process was presenting at community events and organizational meetings. Participant 2 "did presentations, but other than that, I wouldn't say I have had any training experience." Participant 9 shared, "I did lots of presentations as shelters, clinics. I did a lot in person and virtually." Participant 8 described her previous training experience thus, "I've done small trainings. I've done presentations for Group

Connections.” Although Participant 2 had limited experience prior to certification, she explained: “I did try to draw on my experiences of facilitating presentations or information.”

Other participants had some to a lot of previous training experience. Participant 6 “supervised a home visiting program and...had to do some trainings there.” Participant 1 spoke of having to balance many different types of roles and how that prepared her as a facilitator. Similarly, Participant 5 conducted several formal trainings in various roles. Their employer “sent me to some things where I learned tips, tricks, and techniques for presenters and trainers.” They were “hired on to do coaching and training with child care classroom teachers.” Participant 4 had been an early childhood classroom teacher and involved in education for 20 years. Participant 10 talked about having many opportunities to train “at different workplaces” where they “had to develop the content and figure it all out, and how to do it,” and “none of the support happened.” Although Participant 7 had some trainer experience before the certification, she also described a lack of support, sharing: “They never talk to me to help.” They also described previous trainings as “one and done” where the training was only delivered one time. Their experience in the certification “was so different than what I’ve experienced.”

Theme 2: Process Structure and Resources “I Just Think the Process is Amazing”

Processes, structures, and resources played an essential role in supporting learners by providing them with a scaffolded framework, guidance, and the necessary tools to facilitate effective learning experiences. These elements refer to the formal framework and materials designed to support trainer certification and can help learners acquire knowledge, develop skills, and achieve their learning goals. Within the trainer certification process in this study, there are distinct phases and many resources to support the individuals in the process. The section titled

The Trainer Professional Development System in Chapter 3 provides a description of the phases, structure, and resources.

Structured and Supportive Learning Environment “Toss Me in the Deep End”

Participants consistently described the certification process as structured, intentional, and supportive. The process involves two levels of training experience with increasing responsibility and opportunities to practice. Participants perceived that this progression provided them with a clear pathway for skill development and learning. They expressed feeling guided and supported. Participant 10 had “met some other trainers and really like what they had to say about the process.” They concluded that “This is a supportive process that is going to help you to learn and observe” and:

This is a formal process that supported you...versus [development] in other roles...I had a couple of different experiences at different workplaces and I did not personally get support around how to do any kind of training...it was very much like, ‘Alright, you just need to go teach people how to do this think that you know how to do.’...And it was really just, you know, toss me in the deep end and figure it out.

Participant 8 similarly shared they “always felt guided. You’re just supported through the whole process” and “I don’t think anything’s missing. I mean, you got all these pieces of every way that we all learn, you know, visual and with the documentation, and that verbal back and forth...I just think the process is...it’s amazing.”

Several participants described the process as “scaffolded,” indicating support in a continuum of leveled experiences. Participant 6 felt “my Level 1 [experience] scaffolded me very, very well. Like very well,” and “my Level 2 [experience] gave me some really good guidance.” Participant 4 stated, “scaffolding helps me to [understand] complex concepts.”

Participant 1 noted that the levels allowed them to make space “where I was able to spend some time with the [trainer] competencies and really understand them a little better.” Participant 3 felt that “Whoever set that [the process] up set me up for success. Like seriously.” Participant 7 believed the levels gave them an opportunity to “read, explore. Gather information, and then have conversation and apply principles of learning.” Participant 4 also noted the progressive structure, stating, “I do love how it’s set up with the levels and the progression of involvement that becomes more in-depth with each level.”

The structure of the certification process supported Participant 8 in tracking their accomplishments. They shared:

I was gonna get there. And you know, it’s like making your to do list for the day and checking things off.” Speaking of the process, Participant 2 shared, “There was a lot of intentional thought behind it. And the approach to it...It wasn’t like, ‘Oh, you want to be a trainer? Here’s a script. Go ahead.’ It was a very intentional approach to training and not just to the training itself, but to the growth and development of the trainers.

Other participants emphasized the importance of understanding the rationale behind what they are learning. Participant 4 saw this as intentional in shifting their learning focus because “it’s very intentional. It’s very important that you think of these things before you’re having your training work plan.” Participant 8 remarked that in the process, “You get to see the why, the why of it. And you know...we have to know the why.”

A common refrain of participants was about learning to trust the process. Initially, most felt overwhelmed with the process or tried to rush through it. As they progressed, they learned to approach the leveled approach. Participant 8 learned “instead of just letting it all envelop me and overwhelm me, I learned that I need to slow down and just [go] step by step, which is how the

process goes.” Similarly, Participant 6 exclaimed, “I felt like, ‘Wow! This is really something!’ If you follow and really work through your own skills,” you will be successful. Participant 2 “really learned to trust the process, and...let go of my own ways.” Participants expressed confidence after completing the certification levels. Participant 6 said, “I really felt like I was ready,” and Participant 4 shared, “I felt like I was just building off those experiences.” The scaffolded nature of the process allowed trainers to progress gradually and construct knowledge and skills, preparing them for their roles as certified trainers.

One participant was particularly grateful for the opportunities provided by the organization that sponsors the training cadre. Participant 5 emotionally shared:

[This organization] has been a workplace that has provided me the opportunity to be a mom, work from home, given me learning and professional development experiences.

It’s funny. I talk about [the organization] by talking about it like it’s a person, you know, but it’s just like, I can’t...It’s hard for me to describe how much it’s done for me in lots of different ways. It’s the innovation, the flexibility, the nimbleness.

They concluded by saying relievedly, “I’ve wanted to say this for a long time.” They found it important to disclose that the organization has provided the structure for them to grow and develop personally and professionally.

Inconsistencies in the Process “Very Different Experiences.” Participants mentioned the value of having common expectations and standards for trainers’ performance and competencies. Participant 5 explained, “it speaks to the structures that have been put in place, the expectations of the core competencies with a common expectation and standard of what we’re all really trying to deliver.” However, a few participants remarked that increased transparency at the beginning of the process would provide for better understanding earlier. Additionally, half of the

participants noted that they experienced or noticed some level of inconsistency in the certification process. Participant 4 went through certification with a colleague, and they often compared their experiences with different TDSs. They admitted, “[My colleague] and I had very different experiences...my TDS and I spent two hours and went over [things]. And [my colleague] was like, ‘Okay, I had a fifteen-minute meeting.’ Our experiences were very different.” Participant 9 also wished they had experienced more consistency and transparency in the process. They explained they wanted “more consistency across the board.” After some thought, Participant 9 clarified that they “think it was consistent” in some ways because:

I think, ultimately, they [my TDSs] both wanted me to be the best trainer I can be. They just had different styles of getting there and that’s okay because that’s just how people are. You know, you have a great professor in a class you think they are amazing, and you just connected with them and they go to the extra mile and they help you...and then you have another professor and they just tell you, ‘Do this work’ more directly. But the outcome is the same. You wanna pass, you wanna excel. So I can work with different styles.

Participant 9 felt their Level 1 TDS was more supportive while their Level 2 TDS was “so rigid.” They continued, “I just kinda felt overwhelmed. But through that learning process, I learned so much, right?”

Forms and Concrete Resources “Here’s How You’re Gonna Use Them”

The forms and other concrete resources available to participants in the certification process were identified as essential. Trainer candidates have access to supporting forms, competencies, reflective prompts, and other developmental resources. They saw these resources as tools to support their learning and development. Participant 5 appreciated the guidance their TDS

provided to accompany the tools. Their TDS said, “There are the documents. Here’s how you’re gonna use them. Here’s why you are going to use them.”

Documentation and Journaling “I Wrote Some Good Stuff.” Several of the participants specifically called out the reflective nature of the resources. Many of the guiding documents provide reflective questions and prompts for the trainer candidate to consider. A Trainer Development Specialist (TDS) is responsible for sharing most resources during the process. The TDS encourages trainer candidates to record their reflections about their experiences. This documentation helped Participant 7 to capture their learning throughout the process. They mused, “I really should get that out and review it. I wrote some good stuff.” Although one of their TDSs gave Participant 6 “lots of resources,” they “didn’t feel overwhelmed with that.” Participant 8 especially valued intentional time reserved to journal. After a training session, Participant 8 and their TDS “would turn the camera off...and then we would just sit and quietly write. And that’s when I could look inside and think ‘What just happened right there?’...I think it’s helpful to sit and write that.” Participant 4 also “liked having” documentation. They saw it as:

A space where I could capture all the goodness I learned from each level, from my TDSs and co-trainers, and those little notes, and I would use that space...and put in some things that I wanted to incorporate and also for the goals, just to be more accountable when it’s written there.

While they agreed that the reflective journaling was supportive, Participant 3 reported not being able to find some of the administrative resources needed for documentation. They report having to “struggle and figure it out...it wasn’t given to me like everything else was.” They “felt like I was bothering people because everybody’s busy...maybe that’s a me thing. I felt a loss.”

Trainer Competencies “What Should I Be Doing?” Trainer competencies were highlighted as an important tool for participants. This resource is a list of the knowledge, attitudes, skills, and behaviors trainers are expected to possess or develop. They serve as a framework for trainers to identify their strengths, gaps, and goals. Participant 9 believed “those [competencies] were really a good tool for me to be able to identify my weakness and my goals and know where I needed to start as a trainer.” Participant 2 agreed that “looking at those competencies that way helped me a lot.” Participant 5 used the competencies to assess the ways they “got better and better.” Participant 7 valued “the carryover that I learn from [being a trainer]...sharing some of those competencies with my co-workers.” They also use them to consider “how am I going to do that?” and to “help me try stuff out.” Participant 1 stated:

I thought [the competencies] was so important because it grounded me...finding ‘What do I want? What is expected? What are the expectations of a trainer?...Where do we wanna be and where do we wanna go?’ That’s what I felt the competencies did for me between those levels. After I finished Level 2, I could reflect back and say, ‘Okay, this is what I wanted to accomplish. Did I do it? What can I do better?’ So I felt like it was that grounding. It was so important. And really offered me a place to go back and say, ‘Okay, what should I be doing? What is my goal?’

Likewise, Participant 4 found the competencies:

Really helpful...to see what things are maybe more natural or good to go and things that I don’t really have to think about. And then the other things that are like, ‘Oh, yeah, I really need to focus on that and think about that.’...So it was great to have the competencies where I could say, ‘Okay, I’m really focusing right now on this particular

[skill], not a bazillion things at once. You know, ‘Today, this live session, I really wanna focus on my paraphrasing.

Participant 6 described the competencies as her “expectations. This is what you know. This is what you want to strive for, using that to look forward.” Initially, Participant 8 found the competencies frustrating. However, they learned to find value in them as their TDSs could help identify skills they had. Participant 8 shared:

The more I let go of that and just started looking at [the competencies], I always wanted to put ‘not confident’ for my self-assessment. And then that’s when someone would point out, ‘No, today when you did this, you really showed that you can do that part of the competency.’ I think we all need to self-check that way.

Participant 7 felt the “competencies have helped me grow significantly in this role. And even as a trainer for other trainings.” They continued:

They still play a big role...I started out training not knowing that there were competencies, that there were best practice standard of what we do so I was like in awe and eating it up. I would go through them and say ‘Which one do I want to work on? Which one do I want to intentionally focus on today? And how do I think I’m going to do that?’ So I use those competencies to help me try stuff out.

However, Participant 2 noted that “looking at them all at the same time was just overwhelming to me. Like, I can’t. Especially as a new trainer.”

Although the participants initially felt overwhelmed by all the resources, with the support of developmental relationships, they came to appreciate the role of trainer competencies and documentation in helping them set goals, track progress, and reflect on their training journey.

The availability of well-structured resources and competencies enhanced the learning experience, allowing trainers to construct knowledge and skills actively.

Ongoing Meetings, Professional Development, and Optional Opportunities “That’s Like the Star On Top of the Tree”

In the trainer professional development system, trainers have interactive monthly meetings and are offered professional development opportunities. Additionally, trainers are encouraged to establish voluntary learning communities and book clubs. The participants’ responses indicate these opportunities are integral components of the system. Eight participants indicated that the monthly meetings play a crucial role in providing ongoing support, promoting a sense of community, and facilitating continuous learning and growth. Participant 7 emphatically explained, “The trainer meetings...I can’t tell you...that to me is like the star on top of a tree.” Participant 4 said, “The ongoing support is important.” Participant 6 agreed by stating, “The ongoing support and development opportunities are beneficial in enhancing our skills.” Participant 2 described the value in this way: “You’re always connected to other trainers, and you’ve having conversations.” Maintaining connections with training colleagues was frequently mentioned throughout the interviews. This provides space for collaboration, peer learning, and shared experiences.

A few participants also mentioned being offered supplemental activities. Participant 4 appreciated “the choice to participate in additional activities.” Participant 5 described it as:

...always being part of that [opportunities]. Like, ‘Hey, read this. Here’s this webinar.

Here’s these series of swift steps for virtual presenting.’ I’m just like, Wow! I got to do that. Use it for [this work] and also use it for all my community development stuff.

Participant 2 said that optional activities “allowed me to explore topics further” and that peer interaction:

Is probably the biggest piece...otherwise, I think I’d feel completely isolated and just show up to training and hope for the best, whereas now I feel like I can show up to training, and we have a joint understanding of the approach and such.

However, Participant 1 pointed out that “it was just really hard to find the time” for anything extra outside their other work responsibilities.

Theme 3: Learner Action “There’s So Much to Learn”

A major influence on the participants’ experiences was their active engagement in practicing new skills and applying knowledge. This theme refers to the active involvement of individuals in the learning process. Each participant professed that learning is a participatory endeavor and not a passive activity. Learner action gives an opportunity to bridge the gap between theoretical understanding and practical skills.

Reflective Praxis “The Most Beneficial Thing I Did”

Reflective praxis was a repeated theme in all the interviews. Participants highlighted the importance of self-reflection as a valuable tool for growth. They recognized that self-awareness and introspection are crucial aspects of their development as trainers. Participant 3 asserted, “There’s so much to learn through reflection” and that there is “so much growth in that.” Participant 2 agreed, saying, “I really value reflection.”

The certification program explicitly promotes ongoing reflective practice in the process. Participant 6 said the process “encourages reflective practice. We [they and their TDS] talked about reflective practice quite a bit.” Participant 1 described it in this way: “So there was so many opportunities to pause and reflect, pause and reflect, pause and reflect.” Participant 10 said

it helped them to “really kind of process internally.” Participant 5 said reflection helped them realize “that if I was more intentional, I could support people.”

Although they felt it was “very time-consuming,” Participant 8 felt that “the most beneficial thing that I did it that self-reflection” and lamented that outside of trainer development “I don’t think you get the time to really think about how you want to change things.” Because making time for reflection is not commonly practiced, the built-in space for reflection highlights the certification process’s unique approach to promoting self-awareness and learning. Participant 3 stated the process “gives reflection as an opportunity to revisit” behaviors and attitudes. Participant 10 believed reflection enhanced their self-awareness of what they say and also how they physically present themselves. Their reflection in the process made them realize:

I need to think about what I’m doing with me face as I’m listening to someone talk. Not just like, you know, ‘Am I leaning towards them?’ but like, ‘What is my face saying? How do I come off physically to someone watching me in that moment?’

Participant 1 also recognized the importance of their body language. They shared, “It’s important that we know that [our body language]...it’s important that we’re aware of that and I think that would be one of the biggest learning experiences for me.”

Participants engaged in reflection by themselves and with their TDSs. Participant 5 described how, after each training session in their Level 1 phase, they would work with their TDS and “really dig into change and say, Okay, we did this really well. What next? What should we do next?” and also “would sit down at night and [review the trainer script] and then reflect on how the day went.” Participant 2 explained their experience reflecting with TDSs:

What most helped me to learn...was the reflection of just like really small and specific pieces of the training that I was facilitating or watching. What strategies did you use?

What strategies could you use?...was really helpful to me. Overall, reflection is really beneficial.

Many of the participants connected journaling and documentation as complementary to their reflective practice. Writing down thoughts and experiences gives a more comprehensive opportunity for reflection. Participant 3 reviewed their documentation because it allowed “you to see the growth. You can speak all day, but if. You see it on paper, it kinda jumps out at you.” Participant 7 regretted stopping journaling after the certification process, stating, “I really should do more.” Participant 5 continues to review their written reflections and learnings from their development experiences. They recognized, “There are some really good ideas in there, you know. And sometimes, even when I was going to do a lesson, I’ll read in there and I’ll get a really good idea.” Writing down their thoughts and experiences enabled them to see patterns, areas for improvement, and their evolving training style. Participant 8 concluded, “I think it’s helpful to sit and write.”

Application and Practice “I Need to Practice”

When trainer candidates enter the certification process, they begin by observing other trainers and then practicing what they learned. All the participants recognized the application and practice as a key component in the certification process. Participant 10 described how they saw application by sharing:

I watched way too much television as a child, and I love ER. And they would always explain it on ER...and I’ve seen it on other medical shows...this process, you know, you see one, you do one, you teach one. And there is this element that is in the [certification] process.

This experiential approach to learning helped Participant 4 to “apply what we learned...application is a key part.” Referring to the learning process, Participant 2 said, “I need to practice” to feel comfortable with new learning. Some participants described this as a transformation from belief to action. Additionally, application is an indication that the learner values new knowledge. Participant 5 stated, “You apply what you’ve learned. If you’re excited about it, then you’re going to apply it.”

Participant 7 asserted that the knowledge and skills gained in the certification process have broader applicability beyond training: “That partner, facilitate, and reflect [the certification approach to learning]. You know, I use it in my personal life. I use it here with my home visitors in my professional life.” Participant 1 recognized how repeated experiences boosted confidence and encouraged them to try new things. They believed application:

Was a big deal that changed the way I thought and understood relationships and communication. And then I was able to feel so much better. And then it felt like I was just building off of those experiences. And I felt more confident and more brave to try some of the strategies as I did more training.

Participant 7 agreed, declaring, “I think that the [learning] process and the change happens during my training piece” where they practiced new skills. Participant 3 said application is how they continue learning. They shared that when they practice, “you’re always improving.”

Participant 10 felt that “the biggest immediate takeaway was around, ‘Okay, I need to practice.’”

Theme 4: Adversity and Perseverance “The Thing That Scares You the Most is the Thing You Need to Do”

This theme relates to how participants identified the ways their expectations and frustrations in the certification process supported their growth and transformation. Frustration

can play a complex and sometimes beneficial role in the process of learning and change. While excessive frustration can be counterproductive and demotivating, the participants reported that a moderate level of frustration had several positive effects on their learning and personal growth.

Expectation Gap “I Thought I Was a Good Trainer”

All participants reported that there were significant gaps in their initial expectations of the certification process and the actuality of their experiences. Trainers referred to dilemmas or moments of disorientation where they encountered unexpected challenges or experiences that prompted self-awareness, reflection, and sometimes self-doubt. Before starting the process, Participant 1 assumed, “You just need to go teach people how to do this thing.” However, once they started, they found they had to engage in significant preparatory and collaborative work to develop facilitation skills and behaviors, and “that was not something...so that wasn’t really something that had been emphasized to me before.” Participant 1 shared:

I’d make the joke that I thought I was a good trainer until I entered into the training development system. It was going through and working with these amazing trainers that allowed me to really see my own gaps in terms of my training skills. There were things that I never noticed that, without the support of a TDS or a Mentor, I would have never thought were an issue I would have never noticed.

I felt like I was able to do that [present information to learners] from my previous experience training. I mean, I can reiterate material. I can, you know, produce an activity. I can do that. But what happened in Level 1 is we had all these core competencies, these goals, all of the dynamics of what the training was going to be. And then there was reflection and self-awareness. And I think that’s where it happened for me; that was the disorienting dilemma.

Participant 7 agreed, noting, “I had to do all this prep work prior to...like all these different meetings with my TDS.” They continued:

I will tell you that I thought, ‘Oh, I know [this material] inside and out, I won’t need that much time like that they allocate,’ and then I was like, ‘Whoa! I was so wrong.’ It wasn’t about if you knew the content. It was just really getting in and out of curriculum and the workspaces, and the modules. It, it was a little shocking to me, I guess, when I got to Level 1.

Due to success in previous endeavors, Participant 6 shared the expectation that the certification process would be easy. They shared:

You know, always growing up through high school, through college, like things come easy to me. I would go through college classes and not even open my textbook and get an A. You know things always came easy to me, and so to struggle as much as I did was hard, because. I never really...I never struggled like I did with this. So I think you know that kind of was, you know, defeating, too...It was just my whole, you know, just my life experience and putting that in there was like. I’ve never had to work this hard for something.

Participant 5 also thought that “this would be easy, but it turned out to be quite challenging.”

Two participants mentioned differences in the abilities, skills, and personalities of their TDSs and mentors. This variability likely contributed to gaps between expectations and actual experiences. One of the participants had mixed perceptions of their Level 1 TDS experience that impacted their expectations for Level 2. Before starting the process, Participant 6 had worked closely with a colleague who is also a TDS in the certification system, and based on this experience, they expected only having positive experiences with their assigned TDS.

Unfortunately, this participant reported that their experience with their first TDS was challenging and made them question the value of the certification process. They lamented:

My expectation was a little bit different with my Level 1 TDS. I, you know, was expecting [positive experiences in Level 1]...just because we work a lot with [a specific TDS]. My experiences of just the different abilities or skills, personalities of each of the TDSs and the Mentor I worked with were just so different.

These differences made them think, “It’s hard to wonder what’s coming next. That’s a big disorienting dilemma because you had a completely different set of experiences with other hard things that you’ve done before.” However, their experience in Level 2 was positive. They explained, “I was expecting something similar, and then got my Level 2 TDS, and it was different in a good way.”

When asked what was missing in the certification process, Participant 6 answered that they “would have liked to have had more access to what was expected” and that they wished “all the TDSs [were] on the same page and have the same expectations and are working similar.” Participant 10 concluded that they were glad they did not know in advance how challenging parts of the process would be. They quipped, “Sometimes it’s good to be naive.”

Intensity “I Was Sweating and Just Trying to Get it Right”

Every participant described the certification process as intense. The unexpected intensity was most deeply felt in Level 1, emphasizing a steep learning curve. The participants described the process as requiring them to learn a significant amount of material within a short timeframe.

Participant 1 reflected:

That Level 1 is...It’s just the intensity is just so much to learn in a small period of time. I had great preparation. I had all of that. But I felt like the intensity of what is required or

what we have to learn at Level 1, within a Level 1 experience is a lot. The first level, I'm not kidding, I was sweating and just trying to get it all right. And you know, memorizing. I was going all of that to try to accomplish this.

Participant 8 felt, "I was almost like, 'I can't take this pressure.'" Participant 10 described hours of preparation: "There was a lot of times...I would literally hold the pages in my hand and kind of pace around my apartment reading it aloud." Referring to completing all the activities in Level 1, Participant 5 said, "I don't even know how I would do that. It just seems cumbersome." Similarly, Participant 3 laughed and exclaimed, "Oh my God! It was a lot!...It was a lot, but I had a support system and I had people that understood diversity." Participant 4 acknowledged, "You know, it is hard, I'm not gonna lie. It is hard. There's so many things that you have to pay attention to." Participant 9 laughingly said, "At times, I honestly felt like, 'Nope, this is not for me.' But you know I got through it."

Considering the different roles and pressures of being a trainer, Participant 4 explained the reasons they felt overwhelmed:

And you know just all the things coming at you when you're tech, and you've got, you know the chat, and then people coming and going, and you know cameras and volume and you know, it's just that...And then you're putting this training on top of it. So that whole setting was just new to me and trying to learn all the tech and navigate everything. So...you're learning all this stuff you're trying to do. You're being watched. You're trying to make it all work out. And really the thing for me is that I still feel like it's a huge responsibility. I mean, people are paying like 1,000 plus dollars to send their staff for you to train them. It's like just such a huge responsibility I feel like. And you're trying to hold onto that responsibility of. 'Are they really getting it? Can they go out and

do this?’ I still feel, I mean, just every time I’m like, I feel really, just like, thankful that I’m entrusted to say that I am certifying these people to go and do the work.

Experiencing comparable feelings, Participant 8 reflected, “It was a...it’s a process. And I had to slow down, and I had to teach myself that, to slow down and take it one step at a time.”

Participant 2 went through their Level 1 experience with a colleague who had much more experience training. Seeing that their colleagues also struggled in Level 1, Participant 2 reported:

I remember thinking, ‘This is a big deal. This is important.’ So I kind of, I think, saw that the process was really intense for someone with a lot of experience, and I was like, ‘Alright, I really need to, like, take this all in for the experience that it is because clearly this is a big deal.’

They continued by reflecting that the intensity was a fundamental aspect of the learning experience. Noting the support built into the process and the opportunities for growth, Participant 2 emphasized, “There’s chances for practice, reflection, skill-building, mentorship, peer sharing. It’s an intense process, but it’s definitely a learning experience.” Participant 7 also mentioned how support in the process mitigated the intensity: “It’s not like a one and done process. It’s not like other trainings that I’ve learned for other organizations. They never talk to me like to help me through.” Trainers face pressure, rapid learning demands, and varied experiences, leading to moments of both disorientation and growth.

Discomfort “I’m Gonna Do What?”

Participants described feeling overwhelmed and uncomfortable, particularly in the early stages of the certification process, such as their Level 1 experience. This discomfort was attributed to the rapid learning curve, the volume of new information and responsibilities, and the frequent reflection with TDSs. Referring to their early discomfort in the process, Participant 7

asserted, “That was almost...They almost lost me at that point.” Participant 6 shared, “I was starting to shut down a little bit. It was just a lot of weight on me, and a lot of tears were shed and a lot of frustration.” Participant 2 remembered, “At first, it was just like, ‘I’m gonna do what?’”

All the participants expressed that the certification journey had highs and lows, indicated by both challenging and gratifying moments. The variation added to their discomfort. The participants expressed emotional reactions such as frustration and being on edge. Participants 6, 7, and 8 all reported shedding tears during at least one phase in their process. Participant 7 exclaimed, “Oh my God! It was just so varied. It was just high points, low points, you know, expected points.”

Some participants stated their discomfort often led to reflective practice and increased self-awareness. It encouraged them to critically examine their behaviors and decisions. Additionally, many of the participants acknowledged that stepping out of their comfort zone was an essential aspect of their certification. It pushed them to develop new skills and approaches. Participant 6 recognized, “Dealing with discomfort was a significant part of the process.” Despite the challenges, Participant 9 believed, “Now that I’m past all of that, I’m like, this was a really good decision.” Over time, participants reported feeling more confident and capable.

Benefits of Persistence “I’m Happy I Didn’t Give Up”

Despite their frequent discomfort in the process, participants found value in persevering. They believed certification was a growth-oriented experience that benefitted not only themselves but also others who were involved. Adapting to discomfort, the participants described how they became more comfortable with the process and gained confidence in their ability to succeed. Participant 2 explained, “As time goes on, really realizing, I think more big picture and I grew

my ability to focus on how I was going to facilitate.” Additionally, Participant 2 ruminated, “Sometimes I think the thing that scares you the most is the thing you need to do.” Participant 3 stated, “I’m happy I didn’t give up because it’s just so rewarding. I think this process is worth it.” Agreeing, Participant 5 understood “that [the process] was so hard. But then you’re stronger like that,” and Participant 7 shared, “Something beautiful came out of that [discomfort].”

The participants all reported that their perseverance directly led to growth and learning. Although Participant 6 suffered some difficult experiences in the early phases, they were “able to feel so much better” as the process progressed. Participant 4 reported persevering because they “often felt uncomfortable, but that discomfort drove me to improve,” and they mused that “the discomfort I felt was a sign that I was growing.” Participant 3 connected their persistence to the principle that “unto whom much is given, much is required.” They felt a responsibility to complete the certification because they were given an opportunity to grow through it. Participant 2 believed they were not the only person who grew in the process. They recognized, “It really is a growth process which I think is beneficial to everyone involved.”

Emphasizing their motivation to persist, Participant 6 recognized that their challenges led to increased confidence. That participant “kind of...stepped more and more out of my shell.” As they grew more confident, Participant 1 shared, “And that’s where I really became a believer. You know, where I’m saying, ‘Wow! This is really something that if you follow and really work through, you will grow your skills.’” Participant 7 reflected, “I guess what I would say is that if you have a passion for helping people, and, you know, you’ve done the work, that’s it’s not nearly as intimidating as that piece of paper.” When asked how they would describe the certification process, Participant 5 shared it is:

Focused on development. If you are ready to explore yourself, if you are wanting to challenge yourself outside of a comfort zone, if you want to dig deep... That's part of what you would be doing in the process, reflecting on self, thinking about how you can do things better, who you are in this life. You know what you bring, and you're willing to be challenged and kind of dig deep into that. That's what I would say. That's the process. That's really what you're doing. And also I mean, and it's, and it's grueling, you know. It's taxing like energetically energy-wise. You give a lot, and mentally in preparing. And so I would say, it's it's pretty taxing. And but in a good way, you know, like, when you get a good workout like that was so hard. But then you're stronger like that.

Answering the same question, Participant 1 said:

I think I would say, there, it's a process that tests you, your awareness of your skills. It's going to stretch the way that you learn. It's going to give you different perspectives about the learner and about yourself as a trainer, and I really think probably the beauty of it, or what I love most about the process and the system, is that it's well supported. There is help along the way. And there's also experienced people that will help you figure out how to reflect and how to look at, you know, explore that self-awareness. And to get you to that place that pushes you a little bit and stretches your knowledge and experience.

Regardless of the differences in experience, all the participants regarded the certification process as transformational.

Theme 5: Developmental Relationships “And Those People Will Push Me”

Developmental relationships, such as those with mentors and coaches, were identified as paramount importance in the participants' learning and personal transformation. These relationships provide individuals with valuable guidance, support, and opportunities for growth.

In the certification process, there are three formal developmental relationships. The trainer candidate is assigned a different TDS for Level 1 and Level 2. After they complete their Level 2 experience, the new trainer is assigned a Mentor who they work with over the next year. In this text, when the formal role of a Mentor in the certification process is mentioned, the title will be capitalized.

The Role of Trainer Development Specialists and Mentors “How Do You Want to Do This?”

Participants often mentioned their TDSs and Mentors as role models who inspired them to become better trainers. These developmental relationships played a significant role in building trainers’ confidence and empowerment to overcome challenges. Participant 8 recalled, “I think what memorable for me is my TDS for Level 1. I told her, every single day that we trained together, I learned so much from her.” Participants 2 and 7 especially valued the relationship with their Mentor, sharing respectively, “It was so valuable to have the Mentor” and “I really like this mentoring process with my Mentor. She’s awesome.” Participant 3 noted that having formal developmental relationships was unique. They maintained, “But to have that support system in place, a lot of organizations don’t have support in place like that.” Participant 10 agreed, sharing, “And none of that support happened until I got to the [trainer development system].”

Reflection was a recurring theme in these relationships. Participants valued the reflective process and used it as a means of improvement. Participant 8 stated simply, “I really liked it. I liked my reflection with my TDSs and Mentor.” Participant 10 highly valued reflection, emphasizing, “Reflecting, reflecting, reflecting. There’s so much growth in that...[the] reflection is an opportunity to revisit.” Reflection happened in regular meetings, before and after trainings, and in informal conversations about training approaches, methods, and progress. Participant 1 shared, “In between those training sessions, before lunch and after, we spent very valuable time

talking about what I was doing and how I was doing it in training.” Participant 10 agreed, citing “you know, the really big conversations kind of at the end of the training and in between the training sessions” as especially meaningful reflective conversations because “we’re gonna talk about why we did things the way we did things, and why I picked this particular activity to do at this point in the training.” Often, the TDSs helped increase the participants’ self-awareness. Participant 2 noted, “I enjoyed being connected to an experienced trainer and having them bring some things up that I didn’t think of.” Similarly, Participant 1 remarked, “They also asked questions that supported not just the good things that I was doing.” During their experience, Participant 5 had a particularly meaningful exchange with their TDS. Participant 5 shared the TDS asked:

‘How do you choose what stories you choose to share?’ and I was just like, ‘I don’t know. I don’t know. I just say it when it comes to mind.’ But, you know, questions like that lift you up to think about the why of what you’re doing when those [reasons] were not in your consciousness.

Reflection also helped participants reflect on how they wanted to act in the future. Participant 10 shared, “You have the opportunity to speak [with the TDS] about how the training is gonna go,” and Participant 3 asserted, “You’re gonna have the opportunity to work through what are your questions. How do you want to do this?” These conversations offered opportunities for participants to discuss their progress, ask questions, and seek assistance when needed.

The availability of supportive and encouraging developmental relationships throughout the certification process was frequently highlighted by participants. They felt reassured knowing they could turn to their TDSs and Mentor for guidance. Participant 3 shared, “You have the opportunity to work through those [challenges] with someone who’s going to be really

supportive and focused on developing you as a trainer. It's a great thing to have that support." Participant 6 believed, "My Level 1 TDS scaffolded me very, very well and my Level 2 TDS gave me some really good guidance." Participant 7 mused, "I think the nice thing about it is you're never really alone. You're not really on your own. There was...just to have that scheduled conversation to be able to bring out like, 'Hey, this, this has thrown my for a loop.'" Participant 3 avowed, "The mentoring process was definitely important in getting me there."

As discussed, the variability of TDS and Mentor skills and perspectives had a big impact on some participants. Participant 9 reflected:

I had some positive, you know, experiences through both my Level 1. You know, my TDSs, they just had different styles, you know, as far as you know, coaching and teaching. And I'm okay with that because people learn differently and people teach differently. But I mean, when I tell you it was like 2 different spectrums. It was on 2 different spectrums, and not that one was better than the other. It was just they [the TDSs] were just different.

Participant 2 also felt their TDSs "played a very different, but significant role, just because they're different people with their own style."

Participant 8 shared a meaningful experience where she nervously told her TDS about wanting to try something new. Their TDS "just looked at me and she goes, 'I can see you doing that.'" This increased Participant 8's self-efficacy. Participant 6 felt similarly, stating their Level 2 TDS "would tell me, 'You ARE a trainer. You are doing this, got it?' She was really good, and really did a nice job of helping me with my confidence." Participant 10 stressed that with a TDS, "You're not getting lost. You're not, you know, going in 5 different directions to try and figure it out." Participant 3 contended that having a support system was "encouraging. It's encouraging.

And those people will push me. I'll say, 'Hey, you know what, this is too much. I'm good.' And so, if it was for my support system, I think I would have given up."

Several participants described their relationships with TDSs and Mentors as a partnership for mutual growth and development. Participant 1 felt, "We sort of...we're going through this journey together. That was very important to me." Participant 7 observed, "When you're thinking about debriefing [with your TDS], you think together about what happened that impacted the learning experience for the participants." More directly, Participant 3 perceived, "You're looking at them as a support for your growth and development, but also that you're willing to partner with them for their growth and development." In Participant 2's experience, TDSs and Mentors "always make you feel like a peer, like, you know, like you're a partner."

The influence of these developmental relationships extended beyond the certification program. Participant 3 looked forward to a time they could support someone else. They professed, "It makes you feel like, okay, one day I'm gonna have an opportunity to mentor or support someone else that came in just like me." Now, a few years post-certification, Participant 8 pronounced, "And I got so much from [my TDS], and she sent me a poem about communication, and I actually shared it in a staff meeting, and so, like, it just carries over into all aspects." These quotes suggest that developmental relationships are essential components of the certification process. These relationships are characterized by mutual learning, guidance, and a strong emphasis on reflection.

Feedback "I Didn't Realize I Was Doing That"

The participants placed significant value on feedback from their TDSs and Mentors. They viewed feedback as a tool for learning and development. Participant 3 shared feedback helped them to "be validated in what went well." Participant 6 asserted, "Feedback was definitely an

important part. Feedback gave help and ideas and just assistance.” Participant 1 would directly ask for feedback. They would say, ‘I didn’t realize I was doing that. How do I change that?’”

Participant 10 felt that feedback was:

Really huge, being able to be validated. I was standing up there being the one who was presenting and training this and kind of getting that feedback right in that moment, so that you know, in the same day you’re doing it. That was a huge, a huge thing for me in being able to feel ready and feel like I was getting to a place where I could own this.

Having immediate feedback was seen as a valuable resource for growth and competence.

Several participants highlighted that feedback can be subjective and was dependent on their TDSs’ and Mentors’ opinions and perspectives. Participant 7 explained the type of feedback varied greatly between their Level 1 and Level 2:

And then, Boom! [My Level 2 TDS] would go, ‘Right, this is, you should take this, you did this, you need to do that,’ and it’s like, I really value reflection and feedback. I think that was a great tool, but again is subjective. My process, you know, Level 1 versus Level 2, was really different. But I think their feedback was great. Just the overall guidance and reflection.

Participant 5 also had varying feedback experiences and asserted they were all valuable, explaining, “I just always understood the intent behind it.” Pointing to some direct, negative, and offensive feedback they received from their Level 1 TDS, Participant 6 shared, “I don’t have an issue with anybody disagreeing with me, as long as it’s done respectfully.” After ruminating on what they could learn from those negative experiences, they continued, “In Level 2, it got better, and that supported me because I was more open to listen because I was getting feedback both ways.” Participant 2 shared that “concrete feedback was minimal” in their experience. They

wished they would have had more direct feedback to confirm how well they were or were not doing in the process.

Participant 1 reflected that some of the best feedback their TDSs gave them was indirect. Their TDSs asked reflective questions so that “they can get you to have those conversations and identify for yourself what your needs are.”

Overall, participants valued feedback as a tool for improvement and were open to receiving feedback from TDSs, Mentors, and peers. The subjective nature of feedback was acknowledged and mostly accepted as an integral part of their journey to becoming certified trainers.

Safety “I Don’t Have to Put On a Front for Who I Am”

It was essential to the participants that TDSs and Mentors create an environment of psychological safety and openness. Positive interactions and relationships contributed to a sense of safety. Participant 8 exclaimed, “I hit the jackpot with everyone!” Most participants felt like they could exchange ideas without fear of judgment. Participant 5 shared:

I felt certain openness and trust. You know, I didn’t feel like I need to justify or anything or whatever, but it just kind of made me comfortable. I know I don’t have to put on a front for who I am. I can, I can show my skills or my competencies, but I can also grow and lean into that becoming rather than performing. It’s a place of that becoming, you know?”

After their Level 1 experience, Participant 6 felt “very safe in being able to try new things. It was a very safe environment for me.” They expressed being more likely to experiment and learn because they knew they would not be punished for making mistakes.

Participants 3 and 9 expressed some concern about feeling safe as a minority group member within the trainer cadre. Participant 9 wondered if some of the feedback they received in their Level 2 was related to cultural differences. Participant 3 expressed that they valued inclusivity and diverse perspectives. They shared, “I may get [paired] with an older white woman. Here I am, a young black guy, and I’m like, ‘Okay, this is not gonna be fine.’ And it turns out to be fine.” Later, Participant 3 continued, “You really have an opportunity to learn from people who don’t look like you, whose personality is different from yours.” They asserted trainers can find common ground regardless of differences.

Participant 6 had varying experiences with psychological safety. They felt like some of the feedback in Level 1 “came out of nowhere” and that when they expressed fear or uncertainty, the TDS built on that doubt. However, in their Level 2, Participant 6 had a much better experience. In that level, when Participant 6 shared their uncertainties, their TDS would “be like, ‘No, you’re alright for being a Level 2. You’re fine.’” That TDS would specifically look for opportunities to point out when they noticed Participant 6 had improved in areas they were working on. Participant 6 shared, “The TDS would say, ‘I noticed you worked on this. I could tell, and this really worked,’ or even, ‘Let’s try this next time.’ But then I felt safer” and thought, “Okay I can be a bit more safe in this place.” In parallel ways, Participant 2 reflected that the process “didn’t seem so much as a pass or fail, but just that you got through it sufficiently with the understanding you did a good enough job to continue.” This realization also helped Participant 2 feel more comfortable.

Authenticity and Representation “An Opportunity to Have Participants Have a Trainer That Looks Like Them.”

Participants reported having the freedom to adapt and modify their facilitation approach based on their own style and the needs of the learners. They valued the opportunity to incorporate their own unique perspectives into training. Participant 8 valued the opportunity to learn from peers and then incorporate what they found meaningful into their own practice. They reported learning:

By watching the others...so I think it's just taking pieces of all these trainers and TDSs and making my notes of what I like, what I want to implement in my way. But...not becoming [another trainer], not becoming [another trainer]. But building on that puzzle piece of [myself] and how I'm going to present.

Participant 6 felt they had the “autonomy to explore, having the autonomy to choose” and carrying a “sense of autonomy” throughout their certification process.

Representation was particularly important to participants who are People of Color. They emphasized the value of having trainers who can relate to the participants, particularly in terms of diversity. Participant 3 asserted, “It'd be kinda cool to get a dad's perspective or guy's perspective on this and put that lens on it.” It was important to Participant 9 to have “the opportunity to share some of [their] knowledge and just have an opportunity to have [training] participants have a trainer that looks like them.”

Participant 7 described the certification process as focused on strengths and individuality. Trainers are encouraged to build on their own strengths and not conform to a predefined mold or style of facilitation. Participant 7 reflected that the TDSs “didn't want me to be someone I wasn't. They didn't want me to conform to a certain way to facilitate, which I went in thinking I

would have to.” Participant 8 confirmed, “It not like they’re pushing anything that would go against my values or my beliefs.” The certification process helped Participant 2 gain skills so they could conduct training from a place of authenticity that aligned with their value of facilitation. They explained:

But that kind of like, let me bring my skills and attention and approach with me and the content kind of becomes, not secondary, but second nature, I guess. Which I think contributes to one of the values or the philosophy that I shared, like, you know, just the role of a facilitator as opposed to being the content expert.

Other participants described this as having a sense of freedom to innovate and experiment with their training methods, making the process and training more enjoyable and engaging for both themselves and the learners they train. Participant 10 explained that once they understood the content and the rationale for each training piece, “You could rework it but I needed to understand why it was the way it was first. There’s absolute freedom” to be authentic. Agreeing, Participant 5 disclosed, “We have that autonomy in the way we do it, and that’s important.” This sense of autonomy and authenticity allowed Participant 3 to use their unique characteristics to better meet the needs of training participants. They shared:

There’s where my game is going now; it’s not only that I’m delivering it to one group or audience, but that I’m diversifying the training for who’s in the room. So sometimes you have to deliver the training in different ways. So it’s fun. Now, it’s not just ‘Let me read this.’ So it’s fun. It’s fun now. I can relax; now, I can give examples and make it clearer to the participants.

Their authenticity allowed them to relax, provide examples, and clarify concepts in a natural and enjoyable way. Participants were not expected to conform to a rigid training style but were encouraged to bring their unique perspectives, experiences, and values to the training process.

Despite the many ways the certification process encouraged participants to show up authentically, most participants also expressed an awareness they were expected to provide a consistent, quality experience that was harmonious with all trainings provided by trainers in the network. Participant 3 shared that mentorship post-certification “protects the fidelity of the program.” Participant 7 described this as the “art of personalization,” where trainers facilitate consistent trainings that have different flavors.

Theme 6: Peer Learning “So Many Amazing Women That Have Just Like Held Me in Lots of Different Ways and in Different Times and in Different Levels”

Peer learning and developmental relationships are related concepts that involve interactions between individuals to support learning and personal growth, but they differ in several key ways in the certification process. TDSs and Mentors are assigned to trainer candidates and interact around a formal development framework. Conversely, for this study, peers are individuals who are in the trainer network as well as training participants. Peers collaborate, share information, and learn from each other through mutual exchange of ideas and shared experiences. Peer relationships are more voluntary and organic than developmental relationships.

Community “I Feel Like I Can Learn Something from Everyone”

Participants’ responses highly esteemed peer learning in their certification process. They felt a strong sense of community, which was fostered through shared experiences and collaborative learning. Several participants viewed their colleagues as a community of potential

mentors. They believed they could learn from everyone at all levels of experience. Participant 2 reflected, “I feel like everyone’s a mentor to me. Maybe mentor is a strong word. I feel like I can learn from everyone whether they’re new or they’ve been doing this a long time.” Peers helped Participant 1 identify areas of growth. They said, “It was going through and working with these amazing trainers that allowed me to really see my own gaps in terms of my training skills.”

Participant 3 saw that with their peers, they were “able to bounce things off somebody.”

The sense of community was fostered by shared experiences among participants.

Participant 2 ruminated that, “If my co-trainer were there or if I didn’t have another person going through it [certification] with me, my experience would have been significantly different.”

Participant 10 observed that as they shared experiences with peers, the certification experience “at that point, [became] much more collaborative.”

As trainer candidates, a few participants were initially intimidated by their trainer peers.

Participant 2 shared:

I remember, I think, my first or second trainers meeting, walking into the room and feeling initially, thinking, like am I cut out for this? And instantly that was like, you know, huge relief, just the, again, the people in the room are so welcoming, and that growth mindset. I think if I would have walked in and, you know, everyone’s like, ‘Oh, I’ve been doing this for 20 years, and you know I know how this goes, and you know they’re presenting new ways of doing things, and I’m good the way I am.’ I, you know, might have felt a bit more out of place unless I feel I can grow.

Having similar feelings, Participant 5 reminisced:

Where I came in, I was like, man. This is like a tight group of ladies. They’ve known each other a long time, and I was really like, oh, I don’t know. I’m on the outside. I mean,

I had my couple of people that I went through my levels with. But over time, you get to train with a lot more people. It was an unexpected plus, right, that you get that. I'm like, oh, I get to train with so and so and so.

Highlighting that a benefit of the 2019 pandemic was the transition to virtual training through video conferencing, Participant 5 continued:

You meet people. You know, you really do get relationships across the, you know, across the nation. And I don't know, if we were still on ground, I don't know that that would ever happen. So, God! What an unexpected benefit! Because we just, you know, are getting to meet and really like growing relationships across people. That's what I feel like. So now when I go to a trainers' meeting, Oh, my gosh! Now I can work around, be like, 'Yes, I've gotten to know her and her and this trainer and that trainer,' you know, over time, and I find myself even if I don't know them really... Well, it's like a very familiar, you know, place, but I think that speaks to, like, the structures that have been put in place with the working agreement with, you know, the expectations of the core competencies with a common expectation and standard of what we're all really trying to deliver. You know, I feel like that makes a camaraderie.

These experiences indicated a sense of community with a comfortable and familiar environment.

The participants felt welcomed and supported, even if they did not know everyone personally.

Participant 7 maintained, "You're always connected to other trainers; you're having conversations," and Participant 4 said peers share "practical information." The trainer community was described as close-knit and supportive.

Participant 5 allowed themselves to be particularly vulnerable in their interview, sharing they have been comforted through the peer network. They revealed:

It's funny because, you know, here I am in this world, and, you know, supporting parents, and that infant age was so hard, and I just felt so many things like internally. But I feel like [this peer network] held me during all these years. Like, in a real, like, practical sense, with information. And you know, just teaching it. You're hearing it, and you know, when I'm teaching it. I'm like reminding myself of it, right? Practical information, but also relationships of women that I'm like, Oh, my gosh! So many amazing women that have just like held me in lots of different ways and in different times and in different levels. Women who I like and admire so much. And you know the things out here that other trainers are doing in their personal lives, professional lives. It's like inspiring to me. It's like you all have continued to grow me as a professional, you know, with different things you supported me through.

Participant 5 concluded their interview by stating, "I picture myself at my retirement speech just crying and like naming all these women." The peer community provided participants emotional support, opportunities for learning, collaboration, and a sense of belonging.

Interactions "I Like Those Opportunities to Connect"

Participants emphasized the importance of peer interactions as a means of support and collaboration. Peers helped navigate challenges and reduce anxiety. Participant 9 particularly valued the "opportunities to meet other trainers, you know, once a month when I get to see the other trainers and we do an activity together...It's an opportunity to see each other. I like those opportunities to connect." They also noted that they "prefer to be in person, building those relationships."

Participant 7 likened their interactions to the "partnership between home visitors and parents, home visitors and supervisors." They explained:

If you are struggling with something [in training], the co-facilitator can pick up, you know, help you...It was just nice to know that you have a partner that you're doing it together. It not, 'Okay, you do this, and I do that,' and that's it. There's really a partnership there.

The interaction helped "bring anxiety down a little bit so you're more comfortable and more real in the training." Participant 3 reflected on the planning between co-facilitators before a training:

Before you have that training, you have the opportunity to speak about how the training is gonna go. And you may say, 'Hey, [co-trainer]! Look, I'm not strong in Day 3, but I'm gonna give it a try. But if you see me go to the left, please pull me up out of the water.' Right? And so just to have that support system there with you, as you facilitate throughout the training is golden. So you're not left alone. You have that support system, but you still go ahead and give it a shot, and the more you do, the more comfortable you become in it. So it's how you use those relationships with other people...And it's okay to be vulnerable. And say, 'Hey, there's not much strong suit right here.' And that's another thing: you get to meet people from different walks of life, different states, different cities. And you build those relationships with them.

Participant 10 believed that their interactions with peers in certification and "being part of this group of people has absolutely made me more open to that whole idea of, you know, assuming the best intentions." Their experiences influenced them to react differently to conflict and "really, you know, making it a moment to call them in instead of making them feel like they, you know, that people had a really bad reaction to them." Participant 3 also looked for ways to interact with peers in supportive ways, noting that "I could say, 'Hey, I struggle with this, too.' And I can encourage them, and say, 'Hey, trust me...you gonna be all right.'"

Interactions with peers helped to create a safe environment for participants to be themselves. Peers are described as vital to learning in the certification program. Exchanging ideas and insights with peers enriched understanding and contributed to participants trying out new strategies.

Observations “Beneficial to Just Be Open and Observe and Take It All In”

Prior to full engagement in the certification process, participants observe experienced trainers facilitating the training. The purpose of the observation is for trainer candidates to observe the choices and behaviors of the trainers and notice the impact of those decisions on the learners. Trainer candidates watch with the intent of acquiring skills and knowledge they can apply in their own training sessions. Participant 10 described it like this: “You’re gonna observe for the purpose of taking it in, knowing it is something you’re gonna be doing.” Participant 8 said they felt it was important to learn “by watching the others” and Participant 6 believed it was helpful “observing their approach.” Participant 10 also found value in “Watching how the other trainers really handled different situations with the participants there.” Recalling their observation, Participant 7 noted it was “beneficial to just be open and observe and take it all in.” Participant 4 said they “really paid attention to how [the trainers] were saying things, how they were asking questions, how they were giving instructions, and watching everybody else’s reactions.” Participant 4 would even stay after the trainings and ask “some questions.” Observing aided Participant 5 to “just learn from them.”

In the certification process, observation served as a form of reflective practice for the participants. Participants gained insights and inspiration from those with more experience. The participants could see how those trainers handled challenging discussions, prepared for training sessions, and facilitated effectively.

Theme 7: Transformation and Growth “Okay, That Went Well”

Every participant identified aspects of transformation and growth through their certification experiences. The key themes they reported were changes in behaviors, values, and self-concept; feeling a sense of accomplishment; and a renewed commitment to lifelong learning.

Changes in Values, Behaviors, and Self-Concepts “How Did I Not Think That Was a Bad Idea?”

Participant 3 related that the certification process instilled reflection into their practice. The process “allowed me to grow, to be able to reflect, to be able to challenge myself, and see ‘Okay, where are the gaps in my training? What do I need to work on?’” They saw reflection in every part of their role as a trainer and noticed how it impacted their actions. They shared:

When I do prep, I reflect. As I review what I’m gonna discuss, I reflect. I sometimes anticipate what I’m gonna say, but it could change in the moment, depending on what I’m getting in the class. But I do reflect and say, Okay, this didn’t work last time, that joke last time was corny. Let’s use this. I gave this example last time. They didn’t seem to grasp it. Maybe I need to make it more simpler so they can get it. Maybe I need to identify the name in the video. I didn’t do that last time. Let me tell them who was in the video and what they were doing, and it will connect. So, I do reflect before I train.

The value Participant 3 put on reflection has changed how they facilitate. In a similar vein, Participant 1 explained that the certification process:

Really sort of awakened in me the reflective process. I did not...I didn’t really do that [before]. I would complete a training, and I would say, ‘Okay, that went well, I think you know, people got it. I think we’re gonna see change. We’re gonna see transition or I think

they understood the implementations. Yeah, close the book that, chop, that training was over and we move on to, you know, it's 6 months. Do a retraining.'

The reflective process led them to deepen their examination of what went well and how to continually improve.

Participant 10 changed the way they prepare for and conduct trainings. In the past, they just tried to figure it all out on their own. They reflected, "Now, looking back, I like 'How? How did I not think that was a bad idea?'" Likewise, now that they feel competent in the training content, Participant 2's behavior is more centered on practicing facilitation techniques. The way they considered their role has shifted. They shared:

In the beginning, [I was] very content-oriented. Like, 'I need to memorize this stuff and say it in the right way.' And then, just as time goes on, really realizing, I think there's a bigger picture...now I bring my skills and attention and approach with me.

Participant 5 also reported a "deeper understanding of who a facilitator is." This understanding has led them to continually work to improve their skills. One example they shared was about self-regulation. They asked internally, "What would that be? Oh, maybe I want to, there's like a joke I was gonna tell. And it was like, 'Well, is that for me? Or is that for the participants? Who's benefiting from that?'" Participant 5 described this as becoming more purposeful:

I would say, as a facilitator, before [certification], I was more self-centered, and I think after, I would say I was more responsive. I would say before I was more like winging it. And after more intentional. You know, before just kind of going in the moment and after more thoughtful, like still being in the moment, but using thoughtfulness centered around the participants. That's some of the ways that I would describe [myself] before and after.

Participant 5 continued, “This [the certification] drove me to a different level,” and now, “I could see myself doing this forever, you know.”

Participant 7 described a change in how they supported participants. They realized, “I can guide them, encourage them, but they’re going to figure it out on their own and that empowerment is more important than me just solving the issue and moving on.” They continued, “So the transformation for me is that I like to fix things. I like to help people right. And what the [process] really taught me was they’ll figure it out on their own, and I have to be patient with them.” They now prioritize empowerment over “fixing” participants.

Participant 10 spoke about a shift in their mindset. They learned to consider participants more positively. They related, “That wasn’t really something that had been emphasized to me before. And was not necessarily my default personality. So I think that is what really stands out more than anything is that is, is really seeing positivity in practice and wanting to behave that way in the world.”

Participant 1 also felt a transformation in their “awareness of myself as a trainer.” They considered, “I think I perceive almost everything at this point. You know, ‘What am I? What is the purpose? Why am I doing it? What is the rationale? Why am I taking people’s time? And what’s my ultimate goal?’ This new perception has “reframed the way that I approach conversations in my work, and in a lot of other areas of my life, too.” They concluded, “Going through this process really taught me that people learn and understand in a unique way. And as a communicator, somebody who is training and trying to communicate information. It’s important that we know that.” When asked how they continue to increase their awareness, Participant 1 replied:

Pause and reflect, pause and reflect, pause and reflect. And I can't tell you how that actually...It really impacted the way that I look at training and what was important as a trainer. I never realized the importance of that self-awareness, but also awareness of what was being received in the room, how participants were engaging. There were so many levels to that reflection, and changing, adjusting my questions and my statements to be more reflective. That was a direct result of that Level 1 experience...That shifted the way that I've trained ever since. And even conversations, you know, even not even just in training. But when I'm working with a provider, with a trainer, with another colleague. Participant 6 reflected that now, "I'm pretty confident. I'm much more confident and comfortable talking." They continued:

So, the process has helped my confidence overall in being able to speak in front of people and to present to train all of those things. So now, for someone who was never gonna train and didn't like to speak in front of people, not only do I train, but [I am] presenting at [an international] conference. What the hell?

Participant 2 also reported a major change in their self-concept. They shared, "It wasn't necessarily part of my plan, in the first place, to go through this process, so that was disorienting in and of itself," and that led to "changing my view of myself...seeing myself in this new way." Participant 8 said the process has "made better me as a person, as a professional. It has bettered me. I'm a different person because of it for the better." Participant 10 concluded, "This has really permeated through throughout my work and my life."

Sense of Accomplishment "This is Like a Big Deal"

All participants expressed a significant sense of personal growth and accomplishment. Participants reported feeling more confident in their abilities, which enabled them to overcome

challenges and try new strategies. Participant 6 quipped, “Once I got certified, I was like, ‘Yeah, I can pretty much do anything after I’ve been through this.’” Participant 2 recounted, “I do remember thinking like this is a big deal like. This is important.”

Participant 1 described “a point where...people were saying, ‘This is incredible. I got it. I understand.’ And I also felt that same way.” This led them to “feel so much better. And then it felt like I was just building off of those experiences. And I felt more confident and more brave to try some of the strategies as I did more training.” Participant 3 agreed, stating, “I gained a lot of confidence through the process. In the literature, the information, the curriculum.” After certification, they felt like being a trainer was “part of me. So, I can say with confidence. It becomes more real.” Participant 5 shared, “I just remember how I felt before, and this was way different. Now I can put things together so easily and quickly. And I remember just being like super, super nervous. Now I don’t get nervous” they paused and smiled widely, “I mean still get a little nervous.”

Participant 2 recounted, “I do remember thinking like this is a big deal like. This is important.” The disorientation in the certification process led to a heightened sense of accomplishment for Participant 3. They emphasized that the certification process is not for everyone, explaining, “You walk away know that they’re not letting just anybody come on here and train, right? So you’re not getting any Joe off the street.” They considered the difficulty a way to show “this is somebody that’s committed. This is somebody that is dedicated.” Participant 3 concluded, “So, I think now, looking back, it was worth it.”

The shift in participants’ emotional state before and after signified a sense of accomplishment in managing the process and their uncertainties. Participants viewed their roles as certified trainers as a privilege and expressed fulfillment in their work. Ultimately,

participants found the certification process rewarding and worthwhile, even in the face of challenges and hard work. This positive evaluation of their journey reinforced their sense of accomplishment.

Commitment to Lifelong Learning “I’m Still Learning, To Be Honest”

Each participant ended their interview by looking forward to continued learning opportunities. They acknowledged that growth often involves transitions and growing pains. They are willing to navigate these challenges as part of their commitment to lifelong learning and development. Their changes and future motivation are driven by a strong desire to continually improve and adapt, even embracing vulnerability as a pathway to growth.

Participant 2 related, “There’s always going to be something that makes you have to think on your feet. You never know what it’s going to be. Being a trainer is really just a series of disorienting dilemmas.” Participant 1 stated, “I’m still learning to be honest. And still practicing how are we getting there,” and Participant 6 shared, “there’s always going to be something we need to improve on. And, you know, just it’s the part of...working on myself and getting myself out there.”

Participant 3 related that they look forward to every new training experience as an opportunity to grow, asserting, “You always will walk away with something. You *always* walk away with something.” Participant 5 described trainers in the network as lifelong learners who are perpetually ready for the next challenge. “We really dig into change and say, ‘Okay, we did this really, well, what’s next? What’s next? We lean into those growing pains. And we don’t sit still, like we just keep going.” Participant 7 concurred, stating: “I’m a lifetime learner, and I’m always, you know, up for a challenge.” For Participant 8, it was “important that I continue to learn as I grow as a trainer.” Participant 3 valued lifelong learning because “you’re always

improving. You never arrive right? It's almost like, like you always improve. You always can do something better and teach something better for those participants.”

The participants' comments emphasized the concept of continuous improvement. They viewed learning as an ongoing process where they could embrace change and continue to seek ways to enhance their skills. Being open about their uncertainties indicated they see vulnerability as a means of self-improvement. In their estimation, the learning journey does not have a final destination.

Co-Constructed Poetry

As part of the data analysis process, I used poetical inquiry to distill and check core narratives. I co-constructed one poem with each participant's transcript. The text of the poems is solely composed of participants' words pulled directly from transcripts. The structure of the poems is meant to convey the rhythms of speech and evoke a connection between the reader and the speaker. Each tell the certification story in the voice of the participant. Individual poems are in Appendices A-J. Here I share one poem co-created as a synthesis of all the individual poems. It represents the core experiences of trainers in the certification process. As I wrote the poem, I imagined all the participants together in one large joint interview.

Tell Me, What Were Your Certification Experiences?

I'd make the joke that I thought I was a good trainer
Until I entered into the trainer development system.

I generally have been very quiet and shy and kind of just keep to myself.
And so, I've been working very hard to get over that

I think by nature I am more of a facilitator than a presenter
and that kinda took me some time to really understand about myself.

Maybe I didn't consider myself to have those skills,
I guess the competence and confidence at the time.

I wanted to have the opportunity to just to share my knowledge and my experience.
I felt like this was an opportunity to be able to give back, if you will,

I've always been that type of person, that I wanna be able to do different things.
And I'm a lifetime learner, and I'm always, you know, up for a challenge.
And, you know, this was a challenge.

And in your mind, you think, *I'm gonna be a trainer. It's gonna be a cakewalk.*

I went going in thinking,
Of course, I can read a script.
Of course, I can present material.
Of course, I can memorize concepts and activities.
But what happened is we had these core competencies,
These goals, all of the dynamics of what the training was going to be.
It was really intense.
I felt the intensity.
It's just the intensity,
It's going to stretch the way that you learn.
It's going to give you different perspectives about the learner
And about yourself.

Sometimes it's good to be naive, right?
I mean we might say no to a whole lot more things.

Sometimes we'll skip things that are uncomfortable.

At first, it was just like, *I'm gonna do what?*
It was just kind of like, maybe a little bit of 'deer in the headlights.'
I'll just, you know, do whatever they say I need to do.
I was definitely nervous.

Sometimes I think the thing that scares you the most is the thing you need to do.

It's an intense process.
Thorough.
Definitely a learning experience,
A growth process

I almost said, *You know what?*
I'm good.
This is too much.

It was a lot.

You really have to wanna do this, to go through this process
I almost said, *Forget it.*

It was, *Holy cow, this is intense!*

I never struggled like I did with this.
I've never had to work this hard for something.

There were times where I would like just cry. It's like,
I can't do this.
I can't do this.
I can't do this.
And I had to slow down

It can seem overwhelming. Yeah, the process can seem overwhelming.

Not that I thought the process was gonna be easy at in the least at all.
But yeah, it was overwhelming.
cause I almost stopped.
I was almost like, *I can't take this pressure.*

I went in expecting one thing, and then you know something different kind of transpired.
I'm just gonna say it was intense.

It's grueling, you know.
But in a good way, you know,
Like when you get a good workout, like that was so hard.
But then you're stronger.

And none of it was easy.
It shouldn't be easy.
It should be something that you really are serious about,

So when I think about that, I have trauma, not kidding.
No, I'm just. I'm just kidding.

It is intense.

There were times where I would feel really confident,
and times where I feel like I am never gonna get there.

But I never felt alone.

There was a lot of intentional thought behind it, the approach to it.
It wasn't just like, *Oh, you want to be a trainer? Here's a script. Go ahead.*

It was a very intentional approach to training,
 And not just to the training itself,
 But the growth and development of the trainers.
 There's chances for practice,
 Reflection,
 Skill-building,
 Mentorship,
 Peer sharing.

I feel like whoever set that up set me up for success
 it has allowed me to grow, to be able to reflect.
 to be able to challenge yourself.
 and see, *okay, where are the gaps?*
what do I need to work on?
 you're always improving.
 you never arrive, right?

If you are ready to explore yourself,
 If you are wanting to challenge yourself outside of a comfort zone,
 If you want to dig deep,
 That's what you do in the process.
 Reflecting on self,
 Thinking about how you can do things better,
 Who you are in this life, you know,
 What you bring and how you're willing to be challenged
 And kind of dig deep into that.
 That's the process.
 That's really what you're doing.

You know, it's just, it's one piece at a time.
 I really learned to trust the process,
 And I had to do kind of do that, mind switch, you know,
 and let that process work the way it's supposed to.

It's so much information, but I always felt guided.
 I never felt left to just hang in there on myself you know.
 So you're just supported through the whole process.

I love that I was able to have somebody to think with and say,
I didn't realize I was doing that.
How do I change that?
What are some ways that I can improve?

There were so many opportunities to pause and reflect,
 Pause and reflect,
 Pause and reflect.

It really impacted the way that I look at training
 And what was important as a trainer.
 And then, noticing or trying to notice the impact on the participants.

I think all the supports are there.
 This is a supportive process

I had people that understood diversity
 and those people would push me,
 I'd say, *Hey, you know what this is too much.*
I'm good. I got enough going.
Oh, I don't want to go through this,
 So if it wasn't for my support system,
 I think I would have given up.

I mean, you're on your own.
 But you're not really on your own.
 You're always connected to other trainers.

The nice thing about it is you're never really alone.

You're not getting lost.

They wanted me to be the best trainer that I can be.
 They just had different styles of getting there and I mean, that's okay.

Those are hard people to forget.
 They didn't want me to be someone I wasn't.
 They didn't want me to conform to a certain way to facilitate,
 Which I went in thinking I would have to.
 I can just, I can be me.

I grew a lot in the process.
 I definitely grew in confidence and, hopefully, competence.
 I started and did not see myself as a trainer or facilitator
 And ended really seeing myself in this new way.

And what changed would be the awareness of myself as a trainer.

How do I want to be?

Who am I?

What is the purpose?

Why am I doing it?

What is the rationale?

Why am I taking people's time to deliver this information?

And what's my ultimate goal?

I'm still learning, to be honest.
I continue to grow.

I grow continually.
I don't have to put on a front for who I am.
I can lean into that becoming rather than performing.
It's a place of becoming, you know.
And we don't sit still.
Like, we just keep going.
And that's not for everybody.
Some people can't handle change.
But we really dig into change and say,
Okay, we did this really well, what next? What next?

Once I got certified, I was like, *Yeah, I can pretty much do anything after I've been through this.*

Now it's, it's a part of you.

It's a journey that I am so glad I stuck with and kept going.
And it's just, it's made better me as a person, as a professional.

It has bettered me.

Now that I'm past all of that,
I'm like, *This was a really good decision.*

Conclusion

The participants' experiences in the certification process were marked by active engagement, reflective praxis, and transformative growth. They emphasized that learning is not a passive endeavor but a participatory one and highlighted the importance of applying new skills and knowledge in practice. Reflective self-awareness and introspection played a crucial role in their development as trainers, with participants valuing the process of self-reflection and recognizing its role in fostering growth.

As participants progressed through the certification process, they encountered significant gaps between their initial expectations and the reality they faced. The process was described as intense, particularly in Level 1, and was characterized by a steep learning curve and the need to

absorb a substantial amount of information within a short timeframe. Despite moments of discomfort and self-doubt, participants persevered, viewing the process as a growth-oriented experience that ultimately benefited them and others involved.

Developmental relationships with TDSs and Mentors, as well as informal relationships with peers, played a pivotal role in participants' journeys. These relationships provided guidance, support, and feedback, fostering confidence and empowerment. Immediate feedback was valued for its role in enhancing competence, and the creation of a psychologically safe and open environment allowed participants to experiment, adapt, and incorporate their unique perspectives into training. Furthermore, participants reported deepened their learning through peer interaction.

The participants' experiences were characterized by transformation, growth, and a renewed commitment to lifelong learning. They emerged from the certification process with changed behaviors, values, and self-concepts, recognizing the significance of their journeys as trainers and the impact on both them and those for whom they train. In conclusion, the participants' responses have shed light on the experiences in the certification process.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

The purpose of this study was to use a constructivist grounded theory (GT) methodology to understand how learning and transformation are experienced by trainers who have completed a professional development certification program. The guiding research question asked:

1. What are the learning experiences of trainers who have completed a professional development certification program?

Additional questions that supported data collection and analysis included:

2. How do trainers describe their learning experiences?
3. What catalysts or triggers do they identify as instrumental to their learning?
4. What is the nature of the developmental relationships that support the learning experiences of these individuals?

This chapter serves as the denouement for this dissertation. It synthesizes the research findings and their implications for practice and policy related to trainer certification programs. The chapter begins with a brief overview of the chapter's structure and offers a summary of the key discoveries and core themes that emerged from the study. The subsequent section on the emergent theory is the central focus of the chapter. In that section, I connect the core elements and relationships of the constructed theory with the experiences of trainers who have completed a professional certification program. A visual representation that captures the theoretical framework is presented. A connection between existing literature and the emergent theory is presented along with implications for practice and policy. The chapter continues with a

discussion of research strengths and limitations as well as the study's significance. The remaining sections identify recommendations for future research and offer the researcher's final remarks.

Summary of Core Themes

The core themes, central to the theoretical framework of Professional Development Components for Learning and Transformation, represent the essence of this research study. In partnership with the participants, the core themes were constructed through a constructivist analysis of trainers' experiences during a formal trainer certification process. They encapsulate the journey of individuals seeking knowledge, increased competence, and even transformation. Core themes include Learner Identity, Structure and Supports, Learner Action, Adversity and Resilience, Developmental Relationships, Peer Learning, and Transformation and Growth.

The theme Learner Identity encompasses the trainers' existing characteristics, prior experiences, cultural backgrounds, self-concept, self-efficacy, values, and beliefs. It underscores the complex interplay between individual attributes and external influences on their certification experiences. Trainers' reactions to challenges and opportunities varied based on their unique identities, but a shared catalyst was the desire to become part of a respected trainer community. Structure and Supports represents how the certification program's framework, resources, requirements, and ongoing support play a pivotal role in trainers' development. The structured environment provided a roadmap for their professional growth, encompassing various learning opportunities, from formal training sessions to practical applications.

The theme Learner Action refers to the ways trainers actively engaged in the certification process, making choices, reflecting, and constructing meaning from their experiences. This theme underscores the importance of trainers' autonomy, reflective praxis, commitment to

learning, and willingness to collaborate in their learning journey. The next theme, Adversity and Resilience, indicates that the certification process was intense and challenging, often deviating from trainers' expectations. Despite discomfort, trainers persevered and adapted, emphasizing the integral role of adversity in their development.

Social learning and exchange are represented by the themes of Developmental Relationships and Peer Learning. Formal support from Trainer Development Specialists (TDSs) and Mentors, characterized by authenticity, provided guidance and encouragement. These relationships were vital in helping trainers overcome self-doubt and adversity. Peer relationships sustained and deepened development, enabling formal and informal knowledge transfer and application. Resource sharing and encouragement among peers nurtured self-efficacy and community. The final core theme that emerged is Transformation and Growth. Learning experiences were intertwined with evolving professional identities and beliefs. Profound transformations occurred when trainers revisited and revised their role perceptions and assumptions. This theme includes a sense of accomplishment and a commitment to lifelong learning.

By integrating these core themes, the theoretical framework offers insights into the intricate trainer certification process. It emphasizes the need for holistic approaches to professional development, impacting fields like professional development, adult learning, training, and developmental relationships. These findings pave the way for program enhancement, support structure improvement, and pedagogical innovation, fostering learners' growth journeys.

Conclusions and Discussion: Emergent Theory

In this section, I introduce and provide an overview of the emergent theoretical framework titled Professional Development Components for Learning and Transformation constructed from the core themes of the study. The framework, depicted in Figure 5.1, illustrates the co-created essence of the research, shedding light on the complex process of growth and transformative learning within trainer certification programs. The main conclusion of this study is that learner ownership of the learning process is pivotal in facilitating profound learning outcomes for trainers. Through learner autonomy, reflection, and active engagement, trainers take ownership of their development, resulting in deeper understanding and practical application of knowledge. Additionally, the inclusion of authentic social learning relationships, well-designed learning structures, and ongoing support systems is crucial for spurring transformative learning and fostering a culture of continued growth and development among newly certified trainers. The emergent theoretical framework is designed to provide a holistic and dynamic model for professional development within certification programs. This framework acknowledges the interplay of key core themes and aims to integrate them into a coherent structure that fosters effective learning and growth. After the overview of the framework, I introduce, define, and connect the framework's components to the trainers' experiences.

At the core of the framework is the concept of the Evolving Learner Identity. This theme recognizes that each trainer enters the certification process with a unique identity shaped by their characteristics, experiences, and values. As trainers progress through the program, their learning identity evolves as they actively engage in the certification process. The Process Structures and Supports are represented by a layer encircling the Learner Identity, with a subsequent circle for Leveraging Discomfort and Perseverance. The framework emphasizes the importance of

leveraging challenges as catalysts for transformation, acknowledging that growth often occurs when individuals step out of their comfort zones and persist in the face of adversity. The next concentric circle represents the Formal and Informal Support Relationships that play a vital role in nurturing the development of trainers. These relationships encompass developmental relationships with mentors, coaches, and peers, creating a supportive network that guides and encourages trainers on their journey. The outer circle of the framework underscores the significance of Maintaining Transformation beyond certification and emphasizing the need to Inspire Continued Growth and self-awareness. Arrows that arch from the Learner Identity span all the circles and highlight the significance of Active Engagement throughout the trainer's journey.

Professional Development Components for Learning and Transformation

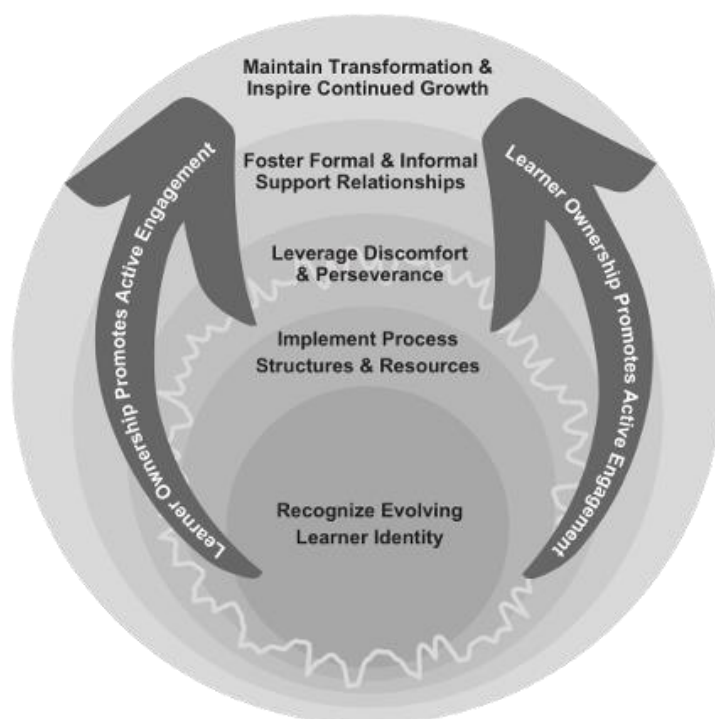


Figure 5.1

Professional Development Components for Learning and Transformation

In the following sections, I will delve deeper into each component of this emergent theoretical framework, exploring how they collectively contribute to transformative learning within trainer certification programs. Table 5.1 provides an overview of the research conclusions that support the framework components.

Table 5.1

Study Conclusions and Implications

Conclusion	Implication
Learner identity significantly influences certification experiences.	This underscores the importance of adopting inclusive practices and individualized planning within certification programs. Acknowledging and valuing the diversity of participants fosters a sense of belonging and enhanced engagement.
Learner ownership of the learning process facilitates profound learning experiences.	By providing opportunities for autonomy and self-directed learning, certification programs can better cater to the diverse needs and preferences of trainers, ultimately enhancing their professional development and competence.
Authentic social learning relationships are crucial.	Fostering a culture of collaboration, support, and knowledge-sharing creates an enriching learning environment that promotes continuous growth and development among trainers.
Well-designed structures are essential for growth and learning.	Prioritizing the establishment of robust structures contributes to the overall success and sustainability of certification initiatives, ultimately benefiting both trainers and the broader community. Formal structures might include formal competencies, activities for reflection and practice, and social learning networks.
Adversity serves as a catalyst for transformation, especially when met with intentional support for perseverance.	Programs should incorporate strategies aimed at preparing trainers to navigate challenges effectively and develop resilience skills. By fostering resilience, certification programs can empower trainers to overcome obstacles and adapt to changing circumstances.
Ongoing support structures maintain and extend transformative learning.	Recognizing the importance of ongoing support structures implies the necessity of implementing comprehensive and sustained support systems within professional development programs. Programs should prioritize the establishment of mechanisms that provide continuous guidance, resources, and social learning to trainers beyond the initial certification phase.

Learner Identity Significantly Influences Certification Experiences

At the core, the framework recognizes that the learner's identity deeply influences their engagement in a certification process. This identity encompasses their unique characteristics, experiences, cultural backgrounds, and beliefs. It is essential to acknowledge and respect each trainer's individual identity as a significant factor from the outset. This component highlights that trainer certification must begin by acknowledging and leveraging these existing characteristics and experiences as foundational elements in the learning process. The framework depends on successfully individualizing supports and activities that align with the processes' guiding professional development purposes and proposed outcomes. Additionally, since a common key motivator catalyzing engagement is the desire to belong to a respected community, the framework relies on a thriving trainer cadre post-certification.

Learner Ownership of the Learning Process Facilitates Profound Learning Outcomes

Learner autonomy and reflection contribute to meaningful engagement and deeper learning outcomes. Starting from the point the candidate applies to the certification program and throughout post-certification continued growth, active engagement encourages trainers to take ownership of their learning and development. This ownership fosters commitment and a sense of responsibility. Actively engaged trainers proactively seek new knowledge, apply learned skills, and reflect on their experiences. Active engagement equips trainers to connect theoretical competencies with practical applications, enhancing their understanding of desired trainer behaviors and attitudes. The integration of stimulating activities that challenge trainers to think creatively, explore possibilities, and apply newfound knowledge promotes active engagement. Peer collaboration and knowledge sharing further enrich the learning environment.

Recognizing trainers' diverse preferences and learning styles is essential for engagement. Providing a variety of options, such as journaling, role-playing, group discussions, reflective debriefing, and real-life skill application, accommodates different learning styles and preferences. It is important to note that trainers' self-identification as active or passive learners can vary based on context and situational factors. Trainers who perceive themselves as passive recipients of knowledge may require additional encouragement and support to become active participants. Flexibility in engagement strategies ensures trainers' needs are met. In cases where trainers face challenges or distractions hindering full engagement, a supportive approach involving additional resources, individualized guidance, and exploration of motivations can help re-engage trainers. The framework considers individual learner identity and supports tailored engagement strategies based on individual needs.

Authentic Social Learning Relationships are Crucial

The inclusion of formal and informal support relationships is a key part of the emergent theoretical framework. These relationships support the evolution of the learner's identity as they help leverage challenges and encourage perseverance. Trainers highlighted these relationships as playing a pivotal role in transformation. Coaches, mentors, and peers offer guidance, support, and a sense of community.

Formal Developmental Relationships

Formal developmental relationships involve structured interactions between trainer candidates and experienced coaches or mentors. The use of formal developmental relationships leverages expertise to guide trainer candidates through the certification process. The value of planning and budgeting for developmental relationships cannot be overstated. Coaches and mentors share their extensive knowledge, skills, and experience, often accelerating the learning

process for trainer candidates. These relationships can be tailored to the unique needs and goals of each trainer candidate, offering individualized feedback and support, and ensuring that trainers receive the assistance most relevant to their development. These relationships also give trainer candidates accountability partners who help them set and achieve their goals. This accountability fosters a sense of responsibility and commitment among trainers, motivating them to actively engage in their own growth. Additionally, interactions with development specialists can boost trainers' self-confidence and self-efficacy because constructive feedback and encouragement contribute to a trainer's belief in their abilities to excel in their roles. Beyond the technical aspects of training, these relationships provide emotional support. Trainers often encounter frustration and self-doubt during certification. Having a trusted mentor or coach to turn to can be reassuring. The relationship between the coach and trainer mirrors the developmental relationship between the trainer and their future training participants. The parallel underscores the importance of modeling effective teaching and learning practices within the certification process, as trainers will draw from their experiences with coaches and mentors to inform their own training interactions.

Peer Learning

Peer learning, which occurs more organically in a trainer network, is an equally vital component within the theoretical framework. The benefits of peer learning are numerous. One core benefit of peer support is the potential to provide emotional encouragement and motivation, which can be particularly valuable during challenging phases of the certification process. These relationships foster a sense of belonging and shared responsibility for each other's success, promoting a collaborative learning environment. Peer learning also exposes trainers to diverse perspectives and experiences within their cohort. This diversity enriches discussions and

problem-solving by offering multiple viewpoints and approaches. Peers often share resources, such as training materials, lessons learned, and planning tools. Learning from each other's successes and disappointments creates a culture of knowledge exchange. Peer learning also contributes to the development of a strong sense of community among trainers. Interacting with peers who share similar goals and standards can be motivating and inspiring. Seeing fellow trainers succeed can energize others to strive for excellence.

Having formalized standards and working agreements can also mitigate some of the challenges in peer learning. Integrating developmental relationships and peer learning into the trainer certification process enhances the learning experience and prepares trainers to be more effective and confident in their roles. These relationships foster a supportive and collaborative environment that is conducive to individual and shared growth, learning, and the successful completion of the certification journey, contributing to a holistic approach to trainer development, resulting in growth and collective support within the certification journey and beyond.

Well-Designed Structures are Essential for Growth and Development

The theoretical framework significantly emphasizes a certification program's formal structure and support system. A structured approach offers trainer candidates a clear and organized pathway for their development. It encompasses various concrete resources, requirements, scaffolded experiences, and ongoing engagements. Structured processes in certification programs offer several advantages. They allow trainers to focus their cognitive efforts on higher-level functions rather than needing to expend mental energy on deciding what steps to take or which resources to use. This allocation of mental energy towards deeper learning, reflection, and application of knowledge enhances problem-solving skills and informed decision-

making. Structured processes also provide trainers with a sense of security and predictability. The knowledge of what to expect fosters confidence and encourages trainers to take risks, engage in experimentation, and explore new ideas. Such an environment promotes effective learning and growth.

Well-defined phases and activities within the process create space for reflection, which is another critical aspect of professional development. Resources like trainer competencies enable trainers to assess their progress, identify strengths, address areas for improvement, and promote a growth mindset. Trainers can measure their progress, celebrate achievements, and stay motivated to continue their learning journey. However, it's essential to strike a balance between fidelity to the process and individualization. While a consistent structure ensures equitable delivery of essential components, recognizing and respecting each trainer's unique learner identity allows flexibility in their learning journey. This balance is crucial for the success of a certification program. Flexibility acknowledges that trainers come with diverse backgrounds, experiences, needs, and learning styles. Offering a range of engagement opportunities accommodates various preferences and evolving styles, such as journaling, role-playing, group discussion, and reflective debriefing, and aligns with the framework's emphasis on autonomy.

Adversity Serves as a Catalyst for Transformation

Leveraging discomfort and perseverance holds a unique role within the theoretical framework for trainer certification. Challenges and adversity are inherent in the growth and learning process and form a critical aspect of the framework that promotes growth and transformation. Trainers often encounter gaps between their expectations and the reality of the certification journey, leading to disorientation and frustration. Discomfort also comes when individuals are pushed outside of their comfort zones. However, this discomfort challenges them

to consider new ideas, skills, or perspectives. In addition, facing adversity and persevering through challenges encourages individuals to develop problem-solving skills by encouraging them to think critically, adapt to new situations, and find innovative solutions. When individuals are willing to step out of their comfort zones and take risks, they are more likely to explore new ideas and approaches. This willingness to experiment and innovate can lead to breakthroughs and improvements in their professional practice.

As trainers persevere in the face of discomfort, they build resilience. Resilience refers to individuals' ability to bounce back from setbacks, stay motivated, and continue pursuing their goals, even when faced with obstacles. Resilience is a vital trait in professional development and career success. It also supports adaptability, a valuable characteristic in a rapidly changing world. Embracing discomfort and persevering through challenges helps individuals become more adaptable to evolving circumstances, technologies, and training trends. As trainers persevere through adversity, they can boost self-efficacy—the belief in one's ability to achieve goals. When individuals successfully navigate challenges, they gain confidence in their abilities, which positively impacts their professional development. A willingness to embrace discomfort and persevere reflects a commitment to ongoing learning and growth and encourages individuals to seek out new experiences and opportunities for development throughout their careers.

Ongoing Support Structures Maintain and Extend Transformative Learning

The final component of the theoretical framework revolves around identifying and maintaining transformation and encouraging continued growth. This component ensures the impacts of the certification process are recognized by the newly certified trainer, endures through the trainers' careers, and produces a cadre of lifelong learners committed to their professional development. Identifying the impact of the certification is essential for newly certified trainers,

as well as program developers, facilitators, and evaluators. There are several reasons to recognize the learning and growth that has occurred. Recognizing one's progress and achievements can be highly motivating. When learners see the tangible results of their efforts, they are more likely to stay engaged and committed to the learning process. Acknowledging what they have learned is also another way to boost learners' self-efficacy. This, in turn, can lead to increased confidence in tackling new challenges. Recognizing growth encourages reflective practices. Learners who reflect on their experiences and learning are better equipped to apply that knowledge in different contexts. When learners understand their progress, it allows them to set more realistic and meaningful goals for the future. It helps them identify areas where they can continue to grow.

Without structures and supports in place to maintain change, trainers may revert to previous practices over time. Transformative learning implies a significant and lasting change in an individual's perspective or beliefs. However, sometimes, individuals can undergo an identity transformation that does not result in sustained behavioral change. Transformation is not a static endpoint. It is a milestone that continues to evolve in an individual's lifelong journey. External pressures, such as peer pressure or professional expectations, can influence behavior more strongly than personal beliefs. An individual might find it easier to conform to these external expectations even if their personal beliefs contradict them. Life continues to present new challenges and opportunities, and these ongoing experiences interact with the transformed perspective and lead to continuous change, which might be positive or negative. People need support to sustain a positive transformation and nurture ongoing growth. As part of the outermost circle in the theoretical framework co-created from this study, ongoing professional development systems are essential for newly certified trainers. A formal development system and network provide dedicated space for continued individual and collaborative learning. All trainers

emphasized the significance of having a larger trainer development system in place after certification. This system created a culture of continued learning.

A meaningful professional development system encourages continued and deepened reflective practice, peer learning and collaboration, and skill development. The trainers in this study explained that a supportive, organized system helped them embrace and celebrate lifelong learning. In this way, transformation becomes an ongoing process rather than a one-time event.

Implications for Theory and Practice

The preceding sections of this chapter have described a theoretical framework for professional development co-constructed from the dynamic learning experiences of trainers who completed a trainer certification program. The empirical insights gleaned from this research effort culminated in the identification of seven core themes that underpin the essence of these experiences: learner identity, process supports and structure, learner action, adversity, discomfort, and perseverance, developmental relationships, peer learning, and transformation and growth. These themes provide a nuanced understanding of the dynamics of professional development within the realm of trainer certification programs. The framework incorporates the seven core themes. In this section, I transition from exploring these core themes to discussing their integration with existing theory and the practical and policy implications the core themes carry. I present recommendations that hold the potential to refine and enhance the design, implementation, and support structures of such programs.

Contributions to Existing Theories and Models

In the following sections, I will describe how the emergent theoretical framework relates to existing models and theories. The emergent theoretical framework, titled Professional Developmental Components for Learning and Transformation, emerged from a constructivist

grounded theory research study. It incorporates seven core themes that provide a comprehensive model for professional development within certification programs. These core themes are (1) evolving learner identity, (2) process structure and supports, (3) learner action, (4) adversity and perseverance, (5) developmental relationships, (6) peer learning, and (7) transformation and growth. Acknowledging the evolving learner identity is the foundational element of the model. It recognizes that each trainer enters the certification process with a unique learner identity shaped by their prior experiences, cultural and contextual backgrounds, self-concept, self-efficacy, values, and beliefs. The learner identity is not static but evolves throughout the certification journey as trainers engage in reflective praxis, self-awareness, and continuous learning. The theory highlights the importance of structured phases and resources provided within the certification process, including clear certification requirements, scaffolded learning experiences, ongoing meetings, training sessions, and additional optional learning activities. It stresses the role of this scaffolded structure in guiding trainers through their development journey, providing essential support, and ensuring a well-rounded professional development experience. The theory connects the trainer's identity and the certification structure with the principle of active engagement. Trainers are proactive agents in their own learning. They make choices, actively engage in their own development, and take ownership of their growth. This learner action involves applying newly acquired knowledge and skills, reflecting on experiences, demonstrating autonomy, maintaining a commitment to learning, and forming partnerships with peers and mentors. Effective certification programs foster active learner engagement. The theory also acknowledges that adversity and challenges are inherent in the certification process. The expectation gap, intense requirements, and resulting discomfort serve as catalysts for developing resilience. Trainers demonstrate their capacity to adapt, persist, and bounce back from setbacks,

leading to personal and professional growth. Developmental relationships, both formal and informal, play a crucial role in the certification process. These relationships involve trainers, coaches, assigned mentors, peers, and colleagues. The theory underscores the importance of these relationships in fostering authenticity, autonomy, psychological safety, self-awareness, meaningful feedback, and supportive assessment. The central premise of the theory is the transformation and growth experienced by trainers as they progress through the certification process. Trainers undergo a profound shift in their identity, values, and behaviors, developing a sense of accomplishment and a commitment to lifelong learning.

This emergent theoretical framework can be integrated into a comprehensive model for professional development that places trainers at the center of their growth journey. The model emphasizes the dynamic nature of learning and transformation and provides practical guidance for certification program designers, facilitators, and trainer development managers. It provides a holistic and learner-centered approach to professional development, ensuring that trainers are not just passive recipients of knowledge but active contributors to their growth journey. It serves as a valuable resource for organizations and institutions seeking to enhance their trainer certification programs, ultimately promoting continuous improvement and excellence in the field.

How the Conclusions are Tied to Existing Models and Theories

This research study on the learning experiences of trainers who completed a professional development certification program aligns with and contributes to several existing theories and models in the field of professional development, coaching, developmental relationships, training, adult education, and transformation, many of which were described in Chapter 2. The study's findings extend these theories and theoretical models. Table 5.2 provides a crosswalk between the emergent theoretical framework and existing literature. It is helpful for the reader to

remember the relationships outlined here are a simplification of the complexities of these theories and highlights the most salient connections to the emergent theoretical framework.

Table 5.2

Alignment Between Emergent Theoretical Framework and Existing Theories

Emergent Framework Core Themes	Existing Theories
Evolving Learner Identity	Transformative Learning Theory (Mezirow, 1978, 1985, 1991, 1993, 2000) Constructive Developmental Theory (Kegan, 1980, 1998, 2000) Ego Development Theory (Hauser, 1993) Levels of Change (Dilts, 2003)
Process Structure and Supports	Transformative Learning Theory (Mezirow, 1978, 1985, 1991, 1993, 2000) Andragogy, Self-Directed Learning (Knowles, 1970, 1975, 1980, 1984) Sociocultural Theory (Vygotsky, 1978) Experiential Learning Theory (Kolb, 1984, 2014) Constructivist Learning Theory (Piaget, 1970; Vgotsky, 1978)
Learner's Active Engagement	Andragogy, Self-Directed Learning (Knowles, 1970, 1975, 1980, 1984) Constructive Developmental Theory (Kegan, 1980, 1998, 2000) Ego Development Theory (Hauser, 1993) Experiential Learning Theory (Kolb, 1984, 2014) Constructivist Learning Theory (Piaget, 1970; Vgotsky, 1978)
Leveraging Discomfort and Perseverance	Transformative Learning Theory (Mezirow, 1978, 1985, 1991, 1993, 2000) Sociocultural Theory (Vygotsky, 1978) Experiential Learning Theory (Kolb, 1984, 2014)
Formal and Informal Support Relationships <ul style="list-style-type: none"> <li data-bbox="253 1545 488 1608">▪ Developmental Relationships <li data-bbox="253 1608 472 1650">▪ Peer Learning 	Behavioral, Cognitive, and Positive Psychology Coaching Theories (various) Sociocultural Theory (Vygotsky, 1978) Social Learning Theory (Bandura & Walters, 1977)
Maintaining Transformation and Inspiring Continued Growth	Constructive Developmental Theory (Kegan, 1980, 1998, 2000) Ego Development Theory (Hauser, 1993) Levels of Change (Dilts, 2003)

Transformative Learning Theory

The study's core theme of transformation and growth resonates strongly with Jack Mezirow's (1978, 1985, 1991, 1993, 2000) TLT. Mezirow's theory posits that adult learners undergo a profound transformation of their perspectives, beliefs, and assumptions, which aligns with the Evolving Learner Identity. The study's findings confirm that trainers who completed a certification process described it as a transformative journey, leading to changes in self-concept, values, and behaviors. The learner identity is not static; it evolves throughout the certification journey as trainers engage in reflective praxis, self-awareness, and continuous learning.

Importantly, the adversity and discomfort inherent in the certification process aligns with Mezirow's (1978, 1985, 1991, 1993, 2000) concept of disorienting dilemmas, which are critical events that challenge learners' existing beliefs and perspectives. Mezirow's TLT emphasizes the process of critically reflecting on one's assumptions and perspectives in the face of disorientation, leading to a transformation of consciousness. TLT also aligns with Process Structures and Supports core theme by emphasizing the importance of structured learning experiences that challenge existing beliefs and foster critical reflection. The process structure and supports provided in professional development programs create the conditions for transformative learning to occur, guiding trainers through a journey of self-discovery and change.

Andragogy

Malcolm Knowles' (1970, 1975, 1980, 1984) theory of andragogy emphasizes the self-directed nature of adult learning. The study's findings about Learner Action highlight the importance of empowering trainers to take ownership of their learning journey and aligns with Knowles' adult learning principles by highlighting the desire for autonomy and self-directed nature of trainers' actions during certification. The theme of Process Structure and Supports also

aligns with andragogy by providing the structure and resources necessary for trainers to take ownership of their learning. The structured framework of professional development programs aligns with adult learners' needs for clear expectations and relevant, problem-centered learning experiences. A structured environment ensures that trainers have the necessary guiderails and resources to actively engage with the content and take control of their learning journey.

Adult Development Theories

Robert Kegan's (1980, 1998, 2000) Constructive Developmental Theory and Jane Loevinger's (Hauser, 1993) Ego Development Theory align closely with the concepts of the evolving learner identity, learner action, and maintaining transformation while inspiring continued learning. These theories provide valuable insights into how individuals evolve in their cognitive, emotional, and moral development, offering a framework for understanding the complexities of human growth and identity formation.

Kegan's (1998) Constructive Developmental Theory, often referred to as the "Orders of Consciousness," outlines a series of stages through which individuals progress in their cognitive and emotional development. At the heart of Kegan's theory is the idea that individuals' sense of self and identity evolve over time. This evolution involves moving from a more egocentric perspective to a more complex understanding of the self and others. As individuals advance through these stages, they develop a more nuanced and sophisticated sense of their own identity, values, and beliefs. This aligns with the concept of evolving learner identity, as trainers progressing through a certification process may undergo a similar transformation, gaining a deeper understanding of themselves as educators and professionals. Kegan's theory also emphasizes the importance of active engagement in one's own development. As individuals move through the stages, they become increasingly capable of self-authorship, where they take

ownership of their beliefs and values. This notion aligns with the concept of learner action, as it highlights the role of trainers as proactive agents in their professional growth. Trainers who actively engage in their own development are more likely to apply new knowledge and skills, reflect on their experiences, and maintain a commitment to lifelong learning, all of which are central to the certification process.

Ego Development Theory focuses on the development of ego maturity and moral reasoning (Hauser, 1993). Loevinger's stages of ego development describe how individuals progress from more simplistic, self-centered perspectives to more complex and mature ways of thinking. As individuals advance through these stages, they gain a deeper understanding of themselves, their values, and their relationships with others. This aligns with the concept of evolving learner identity, as trainers may undergo a similar process of self-discovery and identity formation during their certification journey. Additionally, Loevinger's theory underscores the importance of maintaining transformation and inspiring continued learning. It suggests that individuals at higher stages of ego development are more adaptable, open to new perspectives, and capable of self-reflection. Trainers who reach higher levels of ego development are more likely to embrace change, seek personal and professional growth, and inspire others to do the same. This aligns with the idea that certification programs should not only facilitate initial transformation but also foster a commitment to lifelong learning.

Furthermore, the study's findings on the evolving nature of Learner Identity also aligns with Dilts' (2003) Levels of Change. Dilts' levels represent different aspects of change and include environment (external factors that influence behavior); behavior (observable actions and reactions); capability (skills, knowledge, and abilities); beliefs and values (personal values and beliefs); and identity (one's sense of self and identity). This model provides a framework for

understanding the various levels at which change can occur within an individual or organization. It is often used in coaching, therapy, and personal development contexts to help individuals and teams navigate change effectively. Dilts' six levels of change each represent a different scope and depth of transformation. The environment is the outermost level and represents external factors that can influence behavior. Change at this level involves modifications to the physical environment, such as rearranging the layout of a workspace. The behavior level deals with observable actions and habits. It includes changes in specific behaviors, skills, and actions. Examples include learning a new skill or changing a daily routine. Behavioral changes are relatively concrete and can be measured and observed. At the next level, individuals focus on developing new capabilities or competencies and involves acquiring knowledge, skills, and abilities that enable more effective and adaptive behavior. Entering a trainer certification program is an example. Beliefs and values represent the underlying convictions and principles that guide behavior. Changing beliefs and values is a more profound transformation. This level involves challenging and reshaping core beliefs, attitudes, and values that may be limiting or counterproductive. Coaching and self-reflection often target changes at this level. At the identity level, individuals explore and redefine their self-identity, self-image, and self-esteem. It involves aligning self-concept with desired behaviors and values. A change at the identity level can lead to a fundamental shift in how a person perceives themselves and their role in the world. The deepest level of change and pertains to a person's sense of purpose, meaning, and connection to something greater than themselves. It involves exploring questions of life purpose, values, and spirituality. Changes at this level often lead to a profound sense of personal fulfillment and a redefined sense of mission in life. Dilts' Levels of Change model suggests that effective and lasting transformation often requires addressing multiple levels simultaneously. Changes at the

deeper levels, such as beliefs, values, identity, and spirituality, can have a profound effect on the more superficial levels, like behavior and environment. Recognizing these different levels of change can help individuals and organizations develop more comprehensive and successful change strategies tailored to their specific needs and goals.

Coaching Theories

Coaching theories, including behavioral coaching theories (Dembkowski & Eldridge, 2012; Eldridge & Dembkowski, 2013), cognitive coaching theories (Williams et al., 2010), and positive psychology (Freire, 2013), offer valuable insights into how to effectively foster a formal professional coaching and mentor network within a trainer certification program. Behavioral coaching theories emphasize the importance of understanding and modifying observable behaviors to achieve specific goals (Dembkowski & Eldridge, 2012). These theories can guide development professionals in helping trainers set clear and measurable objectives for their development. They can use behavioral coaching techniques to provide trainers with structured feedback on their performance, helping them make concrete improvements in their training skills. This aligns with the concept of fostering a formal coaching and mentor network, where trainers receive targeted guidance to enhance their capabilities through behavior-based interventions.

Cognitive coaching theories focus on exploring and transforming individuals' thought processes, beliefs, and cognitive patterns (Williams et al., 2010). Within a formal coaching and mentor network, these theories can encourage trainers to engage in reflective practice and self-examination. Development professionals can use cognitive coaching techniques to facilitate deep introspection and guide trainers in identifying and challenging their limiting beliefs or cognitive biases. This aligns with the concept of fostering a formal coaching and mentor network that

promotes self-awareness and cognitive development, enabling trainers to overcome mental barriers and enhance their training effectiveness.

Teresa Freire's positive psychology approaches emphasize the importance of leveraging strengths, resilience, and well-being to foster personal and professional growth (Freire, 2013). In formal developmental relationships, these approaches can encourage trainers to focus on their strengths and positive attributes. Coaches and mentors can help trainers identify their unique strengths and support them in applying these strengths to their training practices. This aligns with the concept of fostering a formal coaching and mentor network that nurtures trainers' psychological well-being and resilience, ultimately leading to enhanced training outcomes and a more positive professional development experience.

Sociocultural Theory

Lev Vygotsky's (1978b) Sociocultural Theory emphasizes the role of social interactions, cultural context, and the Zone of Proximal Development (ZPD) in learning. Vygotsky (1978a) referred to developmental professionals like coaches and mentors as More Knowledgeable Others. Yarbrough (2018) explained:

When we have something new to learn, we often seek a knowledge expert to help us gain new information and apply new skills, we are seeking a mentor or as Vygotsky would say, a More Knowledgeable Other (MKO). The MKO is any individual that has greater understanding or a higher skill level than the learner, with respect to a concepts, process or task. While the MKO can be a peer, a younger person or even technology, most often the MKO is a teacher, coach or older adult. (p. 5)

The study's core theme of Formal and Informal Support Networks aligns with Vygotsky's theory as it underscores the influence of social interactions, coaching, mentoring, and peer learning in

trainers' development. Formal support networks within the theoretical framework involve structured relationships with coaches and mentors. These formal relationships provide a scaffolded framework for trainers to access guidance, share experiences, and receive feedback. Such structured support aligns with Vygotsky's concept of scaffolding, where learners receive support to bridge the gap between their current abilities and their potential. On the other hand, informal support networks, encompass relationships with peers and colleagues. These informal interactions allow trainers to engage in knowledge exchange, collaborate, and offer mutual support. Vygotsky's theory emphasizes the influence of social interactions on learning, and informal support networks resonate with this notion by highlighting the importance of peer-to-peer learning and collaborative problem-solving.

The ZPD concept also provides valuable insights into how challenges can lead to growth and transformation in individuals. This relates to the theme Leveraging Discomfort and Perseverance. The ZPD is the gap between what a learner can do independently and what they can achieve with the support and guidance of a more knowledgeable or experienced person, such as a coach, mentor, or peer. Challenges and tasks that are within the learner's ZPD are those that are slightly beyond their current level of competence but can be achieved with appropriate support. These challenges are neither too easy (already mastered) nor too difficult (beyond current capabilities). In the context of professional development, trainers may encounter challenges that fall within their ZPD when they are presented with new, complex concepts or skills that require further development. Vygotsky (1978b) emphasized the importance of scaffolding, which refers to the support provided to learners to help them bridge the gap between their current abilities and potential. In the face of challenges, trainers can receive scaffolding support in various forms, such as guidance from mentors or coaches, collaboration with peers,

access to additional resources, or structured learning experiences, as emphasized by the Process Structure and Resources component. This support is essential for navigating challenges effectively. As trainers receive support and guidance within their ZPD, they can successfully tackle challenges that were initially beyond their capabilities. This guided learning and problem-solving process leads to acquiring new knowledge, skills, and perspectives. Trainers overcome the immediate challenges and experience growth and development in their professional roles. Challenges within the ZPD are part of a continuous learning journey. Over time, as trainers encounter and overcome multiple challenges with appropriate support, they undergo transformation. Their understanding deepens, their skills become more refined, and their identity as professionals evolves.

Social Learning Theory

Albert Bandura's (Bandura & Walters, 1977) Social Learning Theory emphasizes the role of observational learning and social interactions in the learning process. The study's core theme of Formal and Informal Support Networks aligns with this theory by highlighting the significance of developmental relationships, peer learning, and the influence of mentors and coaches on trainers' growth. Formal support networks involving TDSs, mentors, and training sessions provide opportunities for trainers to observe and learn from more experienced individuals. These formal relationships align with Bandura's emphasis on observational learning and the influence of role models. Informal support networks, particularly interactions with peers, also facilitate social learning. Trainers can observe and learn from their peers' experiences, strategies, and approaches. Bandura's theory highlights how individuals acquire new behaviors and knowledge by observing others, and informal support networks within certification programs leverage this principle by fostering a culture of peer learning and knowledge sharing.

Experiential Learning Theory

Experiential Learning Theory as developed by David Kolb (1984, 2014) suggests that learning is a cyclical process that involves concrete experiences, reflective observation, abstract conceptualization, and active experimentation. The study's core themes of Active Engagement and Leveraging Discomfort and Adversity for Transformation align with Kolb's theory by emphasizing the importance of experiential learning, reflection, and application of knowledge. This theory also aligns with the core theme of Process Structure and Supports by highlighting the need for structured learning experiences and opportunities for reflection. In professional development, the structured framework and supports provided to trainers enable them to engage in experiential learning, apply new knowledge, and reflect on their experiences, all of which contribute to their growth and development.

Constructivist Learning Theory

Constructivist learning theories, including the work of Jean Piaget (1970) and Lev Vygotsky (1978a, 1978b), highlight the active construction of knowledge by learners. The core theme of Process Structure and Supports aligns with constructivism by providing a scaffolded framework for trainers to build their understanding and skills. The structured process offers a roadmap for trainers to actively engage with content, collaborate with peers, and reflect on their learning, aligning with the principles of constructivist learning. It offers an environment where trainers can actively engage with content, collaborate with peers, and reflect on their learnings. These elements are at the core of constructivist learning, emphasizing the importance of structured learning experiences.

Constructive Learning Theory also stresses the active role of learners in constructing knowledge and meaning through their experiences, aligned with Learners' Active Engagement.

By providing a structured certification process with clear milestones, activities, and resources, trainers are guided in their learning journey. This alignment ensures that trainers are actively involved in constructing their knowledge and skills. In addition, Constructivist Learning Theory places a strong emphasis on reflection and problem-solving. A structured certification process can incorporate regular reflection activities and opportunities for trainers to apply their knowledge and skills to real-world training scenarios. This aligns with the theory's focus on learners actively constructing solutions to problems they encounter.

By aligning with and extending these existing theories and models, this study enhances our understanding of the learning experiences of trainers in a certification program. It highlights the transformative nature of the journey, the importance of self-directed learning, the role of supportive relationships, and the evolution of one's self-concept. These contributions provide valuable insights for adult education practitioners and researchers, enriching the theoretical foundations of the field.

Contributions to Fields of Professional Development

This study on the learning experiences of trainers who have completed a professional development certification program makes several contributions and advancements to the field of trainer certification and professional development. The development of an emergent theory, Professional Development Components for Learning and Transformation in a Trainer Certification Process, provides a comprehensive framework for understanding how trainer certification programs facilitate learning and transformation. This theory advances the field by offering a structured and holistic model that encompasses the key components, challenges, and growth opportunities within the certification process. It serves as a foundation for future research and program development. Further, by integrating the core themes, the study advances the

understanding of the multifaceted nature of trainer certification. It highlights the interplay between individual characteristics, program structure, actions taken by trainers, challenges faced, support received, and transformative outcomes.

Learnings from this study provide practical implications for trainer certification programs, such as recognizing and leveraging existing trainer characteristics, designing effective certification frameworks and supports, empowering trainers to take ownership of their learning journey, addressing discomfort, fostering supportive relationships, cultivating a culture of knowledge exchange, and celebrating personal and professional development. These implications offer actionable strategies for program administrators and educators to enhance the quality and effectiveness of trainer certification. They emphasize the importance of tailoring programs to individual needs, creating supportive learning environments, and promoting lifelong learning among trainers. The study also suggests policy implications related to aligning certification and professional development policies, recommendations for policy makers to enhance certification programs, and ensuring inclusivity and equity in certification policies. These policy implications highlight the importance of aligning policies with the evolving needs of trainer certification programs. They emphasize the need for inclusive and equitable policies that support diverse learners and promote excellence in training.

Further, the study connects the emergent theory with established adult learning theories and coaching models, including transformative learning theory, andragogy, constructive developmental theory, and coaching models. By relating the emergent theory to existing models, the study enriches our understanding of how trainer certification experiences align with established theoretical frameworks. It demonstrates the relevance and applicability of these theories in the context of professional development for trainers. The study also offers practical

applications and strategies for incorporating the implications in trainer certification programs. These practical applications provide actionable steps that program administrators and educators can implement to enhance the quality and effectiveness of certification programs. They offer guidance on how to leverage existing trainer characteristics, design supportive frameworks, empower trainers, address challenges, and foster a culture of continuous learning.

This study makes contributions and advancements in the field of trainer certification by developing an emergent theory, integrating core themes, offering practical implications and policy recommendations, connecting with existing theories and models, and providing actionable strategies for program improvement. It enhances our understanding of how trainers learn and transform through certification, ultimately contributing to the professional development of trainers and the quality of training programs.

Practical Application

The conclusions drawn from this study can be applied in practice to enhance professional development certification programs. The primary research question asked *What are the learning experiences of trainers who have completed a professional development certification program?* The core themes that emerged from the study uncovered the essence of these experiences. Trainers described a complex journey that encompassed a wide range of activities, interactions, challenges, and transformative moments. These findings underscored the depth of their multifaceted learning experiences and offered valuable insights into the dynamics of professional development within certification programs. The second research question, *How do trainers describe their learning experiences?*, is most closely related to the researcher's data collection and analysis procedures. It was of utmost importance that my findings honored the words and phrases trainers chose in narrating their stories. The evocative poems that were co-constructed

with the trainers are one tangible way their own words are centered in the findings. Chapter 4 elaborated on how trainers actively engaged in reflection, practice, and meaning-making. This description highlights the importance of autonomy, reflective practices, and lifelong learning in the certification process. By recognizing trainers as active contributors to their growth journey, as well as to this research, the study encourages a more participatory approach to professional development.

The third question explored *What catalysts or triggers do they identify as instrumental to their learning?* The most common catalysts for trainers were disorientation, supportive relationships, and individual motivation. Understanding these triggers provides certification program designers with valuable insights for creating environments and activities that promote effective learning and transformation. The final research question sought to learn *What is the nature of the developmental relationships that support the learning experiences of these individuals?* Trainers emphasized the significance of formal support from coaches and mentors, as well as the importance of authenticity in these relationships. Certification programs can prioritize the establishment of generative developmental relationships to facilitate learning and development by recognizing the depth and authenticity of these connections.

These implications shed light on crucial areas that can be refined and adapted to create more effective and meaningful learning experiences. Drawing from the seven core themes that emerged from the research, the key implications and recommendations that can guide the improvement of professional development programs are (1) human-centered approaches, (2) fostering supportive developmental relationships, (3) cultivating a culture of peer learning, and (4) navigating adversity and discomfort. These implications offer a comprehensive response to the research questions by providing insights into the learning experiences, descriptions, catalysts,

and nature of developmental relationships within professional development certification programs. These resultant recommendations provide a robust foundation for enhancing the design, implementation, and support structures of such programs. This will ultimately benefit trainers and the broader field of professional development. Table 5.3 provides an overview of recommended strategies based on these implications.

Table 5.3

Practical Application Strategies for Professional Development Certification Programs

Key Implication	Recommended Strategies
Human-Centered Approaches	<p>Strategy 1: Pre-Assessment Use a pre-assessment of trainer candidate’s identity. Tailor training and support to align with their existing characteristics.</p> <p>Strategy 2: Individualized Learning Plans Create individualized learning plans for each trainer based on their unique identity and characteristics.</p> <p>Strategy 3: Diversity and Inclusion Develop policies that establish inclusive entry criteria for trainer certification programs. Ensure that diversity is recognized and leveraged.</p>
Fostering Supportive Developmental Relationships	<p>Strategy 4: Structured Coaching and Mentorship Programs Institute structured coaching and mentorship programs that pair trainer candidates with experienced trainers.</p> <p>Strategy 5: Communication Channels Create open channels of communication between trainers and their mentors. Implement regular check-ins and feedback sessions.</p>
Cultivating a Culture of Peer Learning and Collaboration	<p>Strategy 6: Peer Support Groups Facilitate peer support groups or communities where trainers can exchange experiences, challenges, and advice.</p> <p>Strategy 7: Collaborative Learning Activities and Peer Observation Integrate collaborative learning activities and encourage trainers to collaborate on projects, share insights, and develop training materials jointly. Encourage peer observation.</p>
Structured Supports for Navigating Discomfort and Sustaining Transformation	<p>Strategy 8: Transparency and Clarity Clearly communicate requirements and expectations to trainer candidates from the outset. Provide a roadmap of the journey stages and milestones.</p> <p>Strategy 9: Expectation Management Set realistic expectations for trainer candidates regarding the intensity and demands of certification. Prepare them for potential challenges while emphasizing the rewards of persistence.</p> <p>Strategy 10: Trainer Developed Reflection and Growth Plans Encourage trainers to actively shape their learning journey, fostering a sense of ownership and commitment and increasing self-awareness. Emphasize the importance of self-directed learning and provide guidance on setting personalized goals based on standards or competencies.</p>

Human-Centered Approaches: Recognizing the Evolving Learner Identity and Promoting Active Engagement

One of the foundational themes that emerged from this study was the significance of acknowledging diverse learner identities within the context of professional development certification programs. This implies that human-centered learning approaches are key throughout the certification process and post-certification.

Strategy 1: Trainer Pre-Assessment. One effective strategy to gather information about the learner identity is the utilization of pre-assessment tools designed to provide insights into each trainer's unique background, experiences, values, beliefs, and individual motivations. These assessments are often based on frameworks like Knowles' (1980) andragogy. Information from these assessments can inform the customization of learning experiences to better align with individual needs. For example, a trainer certification program can employ a pre-assessment questionnaire that asks trainers about their past instructional experiences, preferred learning styles, and cultural background. This information can be used to customize training materials, assign mentors who are culturally sensitive, and create personalized learning plans.

Strategy 2: Individualized Learning Plans. Based on the pre-assessment results, programs can create individualized learning plans for each trainer. These plans align with the trainer's self-identified unique identity and characteristics, addressing their specific needs, goals, and preferences. This emphasizes the importance of building on prior knowledge and catering to individual differences. For instance, if a trainer expresses a strong inclination towards experiential learning, their individualized plan may include opportunities for hands-on activities, simulations, or real-world teaching experiences. In contrast, a trainer who prefers a more reflective approach may receive assignments that promote self-assessment and critical thinking,

such as journaling. In addition, trainer certification programs should be designed to scaffold developmental experiences. Learning opportunities should range from formal training sessions to practical applications of new knowledge and skills that increase in complexity. Activities should be challenging enough to trigger learning and transformation but not so overwhelming that trainers give up or view the certification process negatively. A diverse range of activities allows trainers to build their competence and confidence gradually and reduces the likelihood of becoming overwhelmed. Importantly, trainers should be encouraged to engage in reflective practices during moments of discomfort. Reflection helps trainers make sense of their experiences, identify areas for improvement, and build resilience. Integrating reflective practices as a core component of the certification process ensures that trainers have the tools to navigate adversity effectively. The findings also imply that certification programs should be adaptable to individual trainer needs and circumstances. Flexible timelines, alternative assessments, or personalized learning paths can help trainers overcome adversity. A support system that acknowledges the difficulties of the journey and offers tailored assistance can empower trainers to persevere and adapt in the face of adversity.

Strategy 3: Inclusion Entry Criteria and Policies. Certification programs should also establish policies that promote diversity and inclusion within their cohorts. The program should ensure that entry criteria are inclusive and that diversity is not only recognized but leveraged as a valuable asset. A program can actively recruit trainers from various cultural, socioeconomic, and educational backgrounds, ensuring that underrepresented groups have equal opportunities. This diversity enriches the learning experience by exposing trainers to a wide range of perspectives and experiences.

Within professional development processes, providing trainers with opportunities for autonomous decision-making within the certification framework is essential. Program designers could provide choices in selecting certain elective modules or deciding on the sequence of their learning activities. This autonomy empowers trainers to align their learning experiences with their unique identities and preferences. Another recommendation is organizing recognition events or ceremonies to celebrate trainers' achievements, milestones, and success stories. These celebrations foster a sense of belonging and accomplishment, reinforcing the idea that every trainer's identity and contributions are valued. For example, a certification program can host an annual awards ceremony where trainers are recognized for their achievements, innovations, or contributions to the learning community. This not only acknowledges their unique identities but also motivates them to continue their growth journey.

By implementing these human-centered strategies, certification programs can create a more inclusive, personalized, and effective learning environment that respects and leverages diverse learner identities, ultimately benefiting both individual trainers and the whole field of professional development.

Fostering Supportive Developmental Relationships

One of the principal themes that emerged from this study was the critical role of developmental relationships for trainers in the certification process. Fostering supportive developmental relationships, particularly through formal coaching and mentoring, holds immense significance within a professional development system. These relationships are pivotal for individuals striving to advance in their careers and continuously enhance their professional growth. Supportive developmental relationships offer guidance along the complex path of professional development. Coaches and mentors, equipped with their extensive knowledge and

experience, provide invaluable insights that can significantly expedite the learning curve. Instead of navigating the terrain solely through trial and error, learners can benefit from the accumulated wisdom of their mentors and coaches, gaining a more comprehensive understanding of their field.

Supportive developmental relationships can provide continuous, long-term support for ongoing development throughout an individual's career. Even seasoned professionals can benefit from sustained mentorship and coaching to adapt to evolving industry trends and challenges. These relationships evolve to meet learners' changing needs and aspirations, ensuring that development remains a lifelong journey.

Strategy 4: Institute Structured Coaching and Mentorship Programs. The framework recommends instituting formal coaching and mentorship programs that pair trainer candidates with experienced trainers. Implementing this strategy aims to connect trainer candidates, typically individuals in the early stages of their careers, with experienced trainers who serve as coaches or mentors. The goal is facilitating knowledge transfer, skill development, and personal growth. Coaching and mentorship programs should encourage regular meetings where experts offer insights, answer questions, and help mentees grow and navigate their roles. This structured approach ensures that each new trainer receives consistent support and benefits from the expertise of their mentor.

To implement this strategy effectively, trainer program managers can start by identifying experienced trainers within the organization who are willing to serve as coaches or mentors. These individuals should have a strong record of successful training and possess key interpersonal skills. Once mentors are identified, a structured mentorship program can be established that sets a schedule for regular one-on-one meetings, outlines a feedback plan within

the relationship, and ensures that developmental professionals have access to resources and support to help trainer candidates succeed. This may include providing these professionals with access to training materials, professional development opportunities, or additional training in mentorship skills. Establishing clear guidelines for coaching and mentorship helps to ensure equity and individualization in formal relationships with assigned coaches or mentors.

It is also important to consider strategies and standards for pairing coaches or mentors with trainer candidates based on their specific needs, goals, and learning styles, including planning conflict resolution strategies for when conflicts arise. Additionally, it is recommended that competencies for coaches and mentors be defined and integrated into the certification process, ensuring that these individuals are well-prepared to provide meaningful support. Competencies also help trainer candidates form expectations for the relationships. In pairing developmental specialists with trainer candidates, it is essential to consider not only the experience but also the personalities and learning styles of both parties. Matching trainer candidates with mentors or coaches who have compatible personalities and learning styles can enhance the effectiveness of the relationship. For instance, an introverted mentor might work well with an introverted mentee who appreciates a quieter and more reflective approach to learning. While thoughtful pairings are important, it is also valuable to expose new trainers to a variety of coaches and mentors with varied personalities and styles. This exposure enables trainer candidates to learn from a spectrum of facilitation methods, leadership styles, and problem-solving approaches. In a trainer certification program, a diverse pool of experienced educators can be recruited to serve as mentors. The program manager can assess the personalities and learning styles of both mentors and mentees and strive to create pairings that complement each other. For instance, a mentor known for their innovative teaching methods might be paired with a

mentee eager to explore new pedagogical approaches. On the other hand, a mentor known for their empathetic and nurturing style might be paired with a mentee who values emotional support and guidance.

Certification program designers should prioritize the selection and training of coaches and mentors. Authenticity was identified as essential to the depth of these relationships, emphasizing the need for selecting individuals who can genuinely connect with and support trainers. Training for coaches and mentors should focus on technical aspects, building emotional intelligence, and effective communication skills. This focus will enable these relationships to flourish and provide meaningful guidance to trainers facing challenges and seeking growth, not only in the certification journey but throughout their careers. Sustaining these relationships even after certification can contribute to ongoing growth and development. Recognizing that developmental relationships extend beyond the immediate certification process is essential. Programs should facilitate continued engagement between trainers and their coaches or mentors, creating a platform for ongoing learning and support. This not only solidifies the sense of community but also reinforces the idea of lifelong learning, which promotes continued quality improvement in the field of training.

Strategy 5: Establish Open Channels of Communication Between Trainers and Mentors. It is also recommended that certification programs create open channels between trainers and their coaches and mentors. This strategy emphasizes the importance of effective communication. To implement it, organizations should establish open and accessible methods of communication. Both developmental professionals and trainer candidates should receive orientation and training on their roles and responsibilities within the mentorship program, as well as the role of the trainer development manager. This training should emphasize the importance of

confidentiality, respect, and clear communication. This includes specifying when and how trainer candidates should approach each party. Coaches and mentors should be recognized as the primary point of contact for trainers regarding day-to-day guidance, feedback, and support related to the program content and their professional development. Also, developmental support professionals can establish expectations about their availability and responsiveness to the trainer candidate's needs. They should be encouraged to foster an environment where new trainers feel comfortable discussing their challenges and seeking guidance. Program managers should also maintain open communication but emphasize that it primarily addresses broader program-related concerns, policy questions, or escalation of issues beyond the coach or mentor's scope. Trainer candidates can approach program managers when they encounter challenges that are not resolved through discussions with their mentors or when they have program-wide inquiries. In addition, the program structure should stress the importance of confidentiality for all parties involved. It is vital to respect the privacy of trainer candidates and maintain discretion in handling sensitive matters. Establishing clear conflict resolution mechanisms that trainer candidates can access if issues arise within the mentorship relationship assures them that their concerns will be addressed impartially.

Regularly scheduled check-ins and feedback sessions provide opportunities for dialogue and collaboration. For example, certification program designers may implement this strategy by creating an online platform where mentors and mentees can communicate regularly. Scheduled video conferences or in-person meetings can also be part of the plan. During these interactions, mentors can provide feedback on the mentee's facilitation methods, offer guidance on lesson planning, and address any concerns or questions the mentee may have. This ongoing communication ensures that the mentorship relationship remains active and beneficial. In

addition to facilitating regular check-ins and feedback sessions, certification managers can provide a platform for trainers to seek clarification or lodge complaints about program processes in a safe and constructive manner.

As part of a communication plan, it is recommended that development programs establish policies that standardize feedback and assessment processes. To implement this strategy, organizations should develop clear and standardized expectations for meaningful feedback, quality assurance, and self-awareness development should be addressed. For instance, a quality and assessment committee might be established to set specific guidelines for assessment and feedback. They may require that trainer candidates receive feedback on their performance after each training session they conduct. Additionally, the guidelines might specify that this feedback should address not only technical proficiency but also self-awareness and the ability to adapt to learners' needs. By establishing these standards, the organization ensures that feedback is consistent, meaningful, and conducive to the development of trainer candidates.

These strategies can be implemented by creating formal coaching and mentorship programs, establishing open communication channels, and defining clear policies and standards for feedback and assessment. When executed effectively, these strategies contribute to a robust professional development system that supports the growth and excellence of trainer candidates.

Cultivating a Culture of Peer Learning and Collaboration

The findings of this study confirm the significant role that peer learning plays in the growth journey of trainers in a certification program. This underscores the importance of fostering a culture of peer learning within these programs to enhance their effectiveness. Peer learning is a cornerstone of effective professional development programs, as validated by numerous studies in the field. Peer learning promotes a reciprocal exchange of insights and

experiences, which can enhance learners' cognitive development. Collegial interactions offer wide-ranging opportunities for collaborative, reflective, and individual learning.

While peer learning offers numerous benefits, it also presents certain challenges. For example, in a trainer certification program, some trainers may have more experience than others, leading to differences in the depth of knowledge shared during peer discussions. Additionally, potential conflicts or differences in communication styles can arise in peer interactions. Trainers with differing communication styles can encounter misunderstandings during collaborative projects, requiring conflict resolution strategies to maintain productive peer relationships.

Despite these challenges, peer learning is a vital component of effective trainer certification programs, supported by research and real-world examples. By recognizing its benefits, addressing challenges, and nurturing post-certification peer communities, certification programs can create a collaborative learning culture that empowers trainers to excel in their roles.

Strategy 6: Facilitate Peer Support Groups or Communities. Intentionally forming peer networks within a trainer development program is foundational because it ensures that these networks are purposeful, organized, and aligned with the program's objectives. When program managers intentionally form peer networks, they can align the composition and objectives of these networks with the specific learning goals of the program. For instance, if the program aims to improve facilitation skills, program managers can intentionally group trainers who excel in this area with those who need support. Intentional formation allows program managers to balance the expertise within peer networks. They can strategically pair experienced trainers with novice ones, creating opportunities for skill transfer. This intentional mix ensures that knowledge and skills are shared effectively. Structured peer networks enable program managers to promote

inclusivity and diversity within peer networks. They can ensure that trainers from different backgrounds, cultures, and experiences are included. This diversity enriches discussions, provides varied perspectives, and fosters a more inclusive learning environment. Additionally, peer networks formed with intent can focus on specific topics or challenges relevant to the program. Program managers can set clear discussion objectives and facilitate targeted conversations.

Strategy 7: Integrate Collaborative Learning Activities and Encourage Peer Observation.

The peer network can be deepened by integrating collaborative learning activities that encourage trainers to collaborate on projects, share insights, and develop training materials jointly. The development manager and trainers can jointly identify points in the program where trainers can collaborate effectively, such as group projects, co-training, or trainer resource development. Clear objectives for collaborative projects outline what trainers are expected to achieve or learn. A feedback mechanism can enable trainers to provide constructive feedback to peers during collaborative activities.

Encouraging peer observation is also recommended. Observation can offer significant benefits to the trainer being observed (the observed) and the trainer conducting the observation (the observer). The observed trainer benefits by having the observer provide feedback on facilitation methods, style, and content delivery. This can help the observed gain insight into what is working well and where there may be room for improvement. This feedback is often more candid and specific than general evaluations. Observers can provide an objective perspective on the observed trainer's performance. They may notice aspects that the trainer themselves might miss during their training sessions. This objectivity helps trainers increase self-awareness. Positive feedback from the observer can validate the observed trainer's effective

facilitation practices. It reinforces confidence in their abilities and encourages them to continue using successful methods.

The observer trainer also benefits. Conducting peer observations allows them to analyze and assess training methods critically. This reflective practice improves their ability to evaluate training sessions and provide constructive feedback. Observers also gain exposure to different training styles, approaches, and content areas through peer observation. This exposure broadens their own repertoire of training techniques and strategies. Further, conducting peer observations hones the observer's observation and analytical skills. They learn to pay attention to details, identify effective teaching practices, summarize observations, and recognize areas for improvement in others' training. Observers can also learn from the observed trainers' strengths and weaknesses by considering effective teaching methods that they can incorporate into their own training. Peer observation is a mutually beneficial practice that promotes professional growth and development. It encourages trainers to continuously improve their training methods, share knowledge, and contribute to a culture of excellence in training programs. Both the observed and the observer can leverage these benefits to enhance their training skills and effectiveness.

Program designers can encourage active engagement by creating activities that allow trainers to share their knowledge and empower them to take on the roles of both learners and teachers. Peer learning should promote a reciprocal exchange of insights and experiences, leveraging the collective expertise of the group that also strengthens trainers' autonomy, reflective praxis, and commitment to lifelong learning. Encouraging engagement with a diverse group of peers, including those at different experience levels, from various backgrounds, and with varying expertise will enrich the learning experience.

Importantly, peer learning should extend beyond the certification process. The findings imply that programs should provide structured professional development communities where trainers can continue to engage in formal and informal knowledge transfer and application even after certification is completed. These post-certification interactions serve as valuable support networks that allow trainers to sustain growth, access resources, and receive peer encouragement. This creates a sense of belonging and shared purpose and reinforces the importance of peer learning as an ongoing, indispensable part of their professional development journey.

Structured Supports for Navigating Adversity and Discomfort for Transformation

The exploration of trainers' learning experiences within professional development programs has illuminated the crucial role of adversity and discomfort as integral components of their transformative journey. Recognizing the potential challenges and providing supports for trainers to navigate these challenges effectively can significantly enhance certification programs. The findings were clear that trainers considered the certification process both overwhelming and transformative. The implication is that both experiences can exist simultaneously. The initial discomfort is a natural part of the transformative learning process. Certification program designers and facilitators should prepare trainers for these challenges, emphasizing that adversity is a crucial element of their growth journey. Normalizing these experiences reframes them as a normal and valuable part of the learning journey. It also supports the trainer in recognizing their growth and commitment to ongoing learning. Recommendations include implementing a transparent trainer development process, supporting expectation management, regularly reviewing process supports and resources, creating a repository of resources, and utilizing trainer growth plans.

Strategy 8: Ensure Transparency and Clarity in Program Expectations. A clear, transparent process is essential to ensure trainer candidates understand the certification requirements and expectations from the beginning. Providing transparency and clarity reduces confusion and fosters a sense of trust in the program. The theoretical framework recommends trainer development programs create a detailed program handbook or guide that outlines all certification requirements, stages, and milestones. This guide should be distributed to trainer candidates when their trainer application is approved. Orientation sessions can be effective in walking trainer candidates through the certification process and answering any questions. These strategies can narrow the gap between trainer expectations and reality, preparing them for the intensity and demands of the certification process. This helps them understand the challenges they may face while emphasizing the benefits of persistence and completion.

Strategy 9: Set Realistic Expectations and Prepare Trainers for Potential Challenges. As part of a transparent process, certification programs should have well-defined and robust frameworks that outline the objectives, competencies, and learning outcomes expected of trainers. A clear roadmap provides trainers with a sense of direction throughout their journey. Within this framework, it is imperative that trainers have access to a variety of learning resources, such as guidance materials, forms, tools, and platforms. These resources should be readily available and easily accessible to facilitate self-directed learning. The findings also imply that clearly defined certification requirements and milestones help trainers understand the progression of their learning journey. Programs should establish specific criteria for achieving various levels of certification. During and after the certification experience, regular meetings and training sessions provide trainers with opportunities to engage in collaborative learning, share experiences, and receive feedback. These sessions should be an integral part of the certification

program. These implications for practice can contribute to more effective, inclusive, and learner-centered professional development experiences for trainers. By focusing on the structure and resources available to trainers, programs can create an environment conducive to transformative learning and growth.

A well-structured process includes the regular review of certification process supporting materials. Continuous review and enhancement of certification forms and material supports ensure that they remain aligned with industry best practices, desired outcomes, and trainer needs. This strategy promotes program relevance and effectiveness. Certification materials should include trainer competencies, timelines, policies, and documentation and reflection forms. Programs can establish a committee or working group responsible for the ongoing review of certification materials. This group should include program administrators, experienced trainers, and industry experts. Schedule regular meetings to assess the relevance and effectiveness of materials. Gather feedback from trainer candidates and incorporate their input into updates. Use technology to track changes and revisions in a systematic manner, ensuring that all trainer candidates have access to the latest versions of materials.

In addition, certification programs can maintain a resource repository. Developing a centralized resource repository streamlines the certification process by providing trainer candidates with easy access to necessary forms, templates, guides, and other concrete resources. This promotes efficiency and consistency in the program. Certification programs can utilize an online platform or portal where all certification-related resources are organized and accessible. Resources should be categorized for easy navigation, including forms, templates, sample materials, and guidelines. Importantly, the platform should be regularly updated with the latest

resources. Provide trainer candidates with login credentials and clear instructions on how to access and use the resource repository.

It is certain that some trainers will have negative experiences during a certification process. Strategies to mitigate these experiences include building a supportive and safe environment, practicing clear communication, offering opportunities for feedback and improvement, and allowing room for flexibility. Creating a supportive and non-judgmental environment within the certification program allows trainers to feel safe sharing their challenges and concerns without fear of repercussions. Clear and transparent communication ensures trainers understand the goals, expectations, and possible challenges inherent in the process. Gathering continuous feedback from trainers about their experiences, especially *before* they encounter negative experiences, can help them feel heard. This feedback can also be used to make adjustments that can mitigate negative experiences for future candidates. Lastly, recognizing that transformation can be a challenging process, provide flexibility in the program to allow trainers to adjust their learning journey as needed within reasonable boundaries. Ultimately, a well-designed certification program facilitates learning and supports and nurtures trainers' transformation and growth.

Strategy 10: Trainer Developed Reflection and Growth Plans. Throughout the certification process, it is essential to help individuals recognize their transformation. Based on the theoretical framework, I suggest instituting annual trainer-created growth plans to incorporate self-awareness and feedback. Throughout the certification journey, at the culmination of the experience, and into the broader development system, trainers can identify transformation through self-reflection, self-assessment, and goal-setting. Objective assessment measures can be developed to support consistency and equity. These measures might include documented trainer

competencies, standards, and expectations. Objective, quantifiable data enables tracking progress in trainers' performance and skills. Evaluating their own performance is an effective tool for recognizing change because it solidifies learning and personal development.

Encouraging trainers to mindfully engage in reflection on moments of cognitive dissonance or discomfort is especially powerful. These dilemmas often form the seeds of significant personal and professional growth. In addition to open-ended journaling, providing a few preset prompts for self-reflection and assessment can be an effective strategy to reduce reflection fatigue, help organize ideas, and prompt insight and awareness. Preset prompts offer structured guidance for reflection. Especially at the end of an intense experience like trainer certification, trainers may sometimes feel overwhelmed by open-ended reflection. They may not know where to start or what aspects to focus on. Preset prompts provide specific topics or questions to consider and make the reflection process more manageable.

These reflective prompts can cover a range of relevant topics. Variety allows trainers to focus on different aspects of their practice. For example, one prompt may focus on facilitation strategies, while another may address learner engagement or management of collaborative activities. Well-crafted prompts can encourage deep thinking and self-discovery. They may prompt trainers to delve into specific incidents or experiences, analyze their decision-making processes, and consider the impact of their actions on learners. This depth of reflection can lead to greater insight and awareness. Further, preset prompts can be aligned with the goals and objectives of the trainer certification program. This ensures that reflection remains relevant to the desired outcomes of the program and helps trainers stay on track toward their professional development goals. Over time, trainers can compare their responses to preset prompts from different phases of trainer development. This allows them to track their progress, identify trends

or patterns in their development, and recognize areas where they have grown or need further improvement. If trainers are part of a certification cohort or a larger trainer network, preset prompts can facilitate peer sharing and discussion. Trainers can exchange insights and perspectives based on their responses to the same prompts, enriching the reflective process through collaboration. It is essential for certification processes that incorporate preset prompts to periodically review and update them to ensure they remain relevant and aligned with the evolving needs of trainers and the larger development system. Encouraging trainers to add their own prompts or reflections allows for personalization within the structured framework. This balance between structure and flexibility can create a robust self-assessment process that reduces reflection fatigue and fosters continuous growth and development.

Peer feedback and observation can also provide valuable insights into a trainer's development. Experienced colleagues can encourage certified trainers to engage in peer review sessions or participate in observation. Peer feedback can highlight areas of growth that might not be immediately apparent to the trainer. Finally, trainer development managers can incorporate post-certification interviews with trainers to gather their perspectives on their learning and transformation. Interviews provided space for trainers to process their thoughts externally. As I collected data through interviews for this study, I often paraphrased participants' responses and pointed out places where they described change or growth. Almost universally, the participants said something like, "Oh, wow. Yeah, I didn't realize that before but now I can see it." The qualitative insights garnered from interviews provide a more nuanced understanding of the certification experiences.

Utilizing annual trainer growth plans is a proactive step that urges trainers to prioritize key areas for growth. These plans help trainers focus their efforts on clear goals and establish

accountability measures. By setting measurable and achievable objectives, trainers commit to their own growth. The annual nature of these plans reinforces the idea that learning is an ongoing process, and each year presents new opportunities for development. Further, encouraging trainer candidates to actively shape their learning journey fosters a sense of ownership and commitment to their development. It emphasizes the importance of self-directed learning and personalized goal setting. Trainer development programs may want to support the development of growth plans by incorporating a module or workshop on self-directed learning and goal setting within the certification program. They can also provide trainer candidates with guidance on developing their growth plans based on program standards or competencies. Encourage regular reflection on progress and adjustments to growth plans as needed. The recommended mentorship and peer support for trainer candidates and new trainers will support them in their self-directed learning journeys. A regular recertification cycle provides trainers opportunities to revisit the broader certification activities, including a new pairing with a trainer development coach or mentor.

These recommendations can serve as extensions of the certification process, reinforcing the notion that becoming a certified trainer is not the end but the beginning of a learning journey. The combination of the Trainers' Agreement, Trainer Competencies, Annual Growth Plans, and a regular Recertification Plan creates a comprehensive system that aligns with the mindset of lifelong learning. It instills the belief that learning never stops and encourages trainers to continuously seek opportunities for improvement. This approach not only benefits the individual trainers but also enhances the overall quality of training and education provided by the certification program. Especially in social services, trainers are often the face of an organization or field. How they present information and facilitate learning directly affects the perception of the sponsoring organization. Mechanisms for participant evaluation and feedback can provide

insight and generate constructive strategies for continuous quality improvement of trainers, the professional development system, and the organization at large.

Recommendations Summary

The implications and recommendations provided in this section offer a comprehensive response to the study's research questions by addressing and describing the learning experiences, catalysts for transformation, and the nature of developmental relationships within these programs. Key takeaways include the importance of human-centered approaches, fostering supportive developmental relationships, cultivating a culture of peer learning, and structured support for navigating discomfort and sustaining transformation. By incorporating these implications and recommendations into practice and policy, professional development certification programs can improve the quality and effectiveness of their offerings. This not only benefits trainers but also contributes to the overall enhancement of training and education in various fields.

Strengths and Limitations of the Study

As presented in Chapters 4 and 5, this study on the learning experiences of trainers who have completed a professional development certification program exhibits several notable strengths and limitations. These aspects have had specific manifestations within the study, shaping both its insights and constraints.

Strengths

The study's strong theoretical foundation, grounded in Constructivist GT and SI, significantly contributed to the depth of understanding of trainers' experiences. For instance, the study's use of SI allowed for the exploration of how trainers assigned symbolic meanings to their experiences, as evidenced in their narratives. These symbolic meanings influenced their actions

and perceptions, which the study was able to dissect and analyze effectively. The emphasis on collaborative co-construction of theory between the researcher and participants is reflected in the rich narratives provided by participants. For instance, participants actively co-constructed the emergent theory by sharing their personal experiences, and the study incorporated their voices throughout.

The study's flexibility in data collection and analysis methods allowed for a comprehensive exploration of participants' experiences. Semi-structured interviews and poetical inquiry, for example, facilitated a nuanced understanding of trainers' experiences by capturing verbal and emotional aspects. Further, the iterative and reflexive nature of the research process enriched the depth of understanding. The study's constant comparative analysis, memo writing, and coding processes evolved over time. For instance, the iterative coding process enabled the identification of core categories central to understanding trainer certification experiences. On the other hand, Memo writing documented evolving ideas and interpretations, which directly contributed to the emergence of core themes.

Transparency and reflexivity are exhibited throughout the study as I acknowledged how my prior experiences and perspectives as a trainer and leader influenced me. This self-awareness ensured the credibility and trustworthiness of the research process. For example, the study's reflective practices helped identify and mitigate potential personal biases, which might have influenced data collection and analysis. Finally, incorporating poetical inquiry added a creative and emotional dimension to the study's findings. By creating poems from participants' words and phrases, the study was able to evoke emotional connections and make research findings more accessible and relatable, as exemplified in the participant's response to the poem shared during a conference session.

Limitations

The study included a relatively small sample size of ten participants. While Constructivist GT emphasizes theoretical sampling, which can lead to smaller sample sizes, the findings may not fully represent the diversity of experiences within the broader population of trainers in certification programs. For example, the limited sample size might not capture the full spectrum of experiences, potentially missing out on unique perspectives or outliers. Also, despite efforts to mitigate researcher bias through reflexivity, my prior experiences and perspectives as a trainer and educator may have influenced data collection and analysis. This influence might have shaped participants' responses, leading to social desirability bias in their answers. For instance, participants might have been inclined to present themselves or their experiences in a more favorable light due to the researcher's background.

Data collection was conducted via Zoom videoconferencing due to practical constraints. This potentially affected the richness of data compared to in-person interviews. Non-verbal cues and body language might not have been fully captured through virtual interviews, limiting the depth of understanding. Moreover, the study acknowledged the potential benefits of qualitative data analysis tools like NVivo and Atlas.ti but did not leverage them to their full potential. This limited use may have impacted the efficiency and depth of analysis. For example, these tools could have facilitated a more systematic and efficient organization of data, potentially leading to additional insights.

Finally, the study's findings are context-specific to the trainers in the specific professional development certification program studied. Generalizing the results to other contexts or populations should be done cautiously. For instance, the unique characteristics of the

certification program and its participants might not be representative of all trainer certification programs.

Despite these limitations, this study has yielded valuable insights and constructed a comprehensive theoretical framework that can guide future research and program development. The study's strengths included its theoretical grounding, collaborative approach, and flexible data collection and analysis methods. However, it also had limitations related to sample size, potential researcher bias, data collection method, limited use of data analysis tools, and generalizability. Recognizing these limitations allows for a nuanced interpretation of the findings and emphasizes the need for further exploration and validation in diverse contexts and with larger samples.

Addressing Potential Bias and Validity Concerns

To address potential researcher bias, I prioritized transparency and reflexivity. I acknowledged my prior experiences and perspectives as a trainer and educator, and actively engaged in reflexive practices to identify and mitigate personal biases throughout the research process. This self-awareness and transparency helped ensure the credibility and trustworthiness of the study. Participants in qualitative research may also exhibit bias by presenting themselves or their experiences in a socially desirable manner. To minimize this potential bias, I encouraged open and honest dialogue during interviews. Emphasizing the importance of sharing both positive and challenging experiences allowed participants to provide a more balanced perspective.

The study acknowledged its relatively small sample size and the potential limitations associated with it. However, these limitations were within the framework of Constructivist GT which emphasizes theoretical sampling. The study aimed to achieve theoretical saturation,

meaning that data collection continued until no new categories or concepts emerged. This approach ensured that the sample size was appropriate for the study's objectives. I also employed poetical inquiry as a supplementary method for analysis. While this added a creative and emotional dimension to the research, it could be seen as introducing a form of interpretation bias. To address this concern, I explained my rationale for using poetical inquiry and emphasized that the poems were created solely from participants' words and phrases. Finally, after completing a solid draft of Chapters 4 and 5, I engaged in member checking, a technique where participants review and validate research findings. Participants were asked to review their quotes and the resultant interpretations. To aid their review, I gave them their participant number and described how they could use search features to find relevant passages. Members were given the opportunity to clarify their stories and my interpretations. I also offered to remove any quotes to which they objected.

The study proactively addressed potential bias and validity concerns by emphasizing transparency, reflexivity, and participant engagement. It justified its sample size within the Constructivist GT framework, recognized limitations of data collection methods, and indicated a commitment to improving the use of qualitative data analysis tools in future research. While potential biases were acknowledged, the study's approach aimed to maintain the credibility and trustworthiness of the findings.

Recommendations for Future Research

During and after completing the study, I reflected on what I might have done differently to strengthen the study or what I might do differently if I were to continue researching this topic. These reflections identified several recommendations for future research and potential research questions. Although this study has shed light on the learning experiences of trainers who

completed a professional development certification program and contributes to an understanding of the complexities and transformative potential of such programs, several areas within the field of trainer certification warrant further investigation.

Future research could benefit from longitudinal studies that follow trainers over an extended period after completing certification. This would provide insights into the long-term impact on their professional development and practices, allowing an assessment of the sustainability of transformational changes. Comparative studies that explore the differences in learning experiences and outcomes among trainers who have completed various types of certification programs are also needed. Examining how different program structures and components influence development could inform program design and improvement. Comparative research that examines trainer certification programs from a global perspective would be similarly valuable.

A critical area for investigation is the inclusivity and equity within trainer certification programs. Research should explore certification programs can be made more accessible to a more diverse range of individuals, including those from underrepresented backgrounds, and how certification policies can be designed to promote inclusivity. Future studies also could investigate the impact of trainer certification on the effectiveness of training programs delivered by certified trainers.

As technology continues to shape the field of education and training, there is a need to investigate the effectiveness of online and technology-based trainer certification programs. Since the COVID-19 pandemic, professional development and certification activities in virtual or online setting has expanded exponentially. Study in this area could explore how in-person efforts compare with development through virtual means. Another area of interest is a focus on the

development of assessment tools and quality assurance mechanisms for trainer certification programs. Research could help explain how these might ensure that certification processes are rigorous and that certified trainers meet high standards. Finally, trainer certification programs often draw from various educational and professional fields. Future research should explore interdisciplinary approaches to trainer development and certification, acknowledging the diverse knowledge and skills required.

These areas represent opportunities for researchers, policymakers, and educators to continue advancing the field of trainer certification. Further investigation in these areas can lead to more effective, inclusive, and impactful certification programs that contribute to the growth and professional development of trainers and, ultimately, benefit learners and organizations.

Final Remarks and Conclusion

In the final remarks and conclusion sections, I reflected on the research process for this study on trainer certification experiences, key findings, and insights, discussed my commitments made based on the emergent theoretical framework, acknowledged potential challenges in implementing these commitments, and summarized the research study.

Reflections on Research Process and Data Collection

The research process for this study on the learning experiences of trainers who have completed a professional development certification program was guided by a Constructivist Grounded Theory (GT) approach developed by Kathy Charmaz. This approach emphasized the collaborative co-construction of theory between the researcher and study participants. As a novice researcher, I identified several key reflections and insights that emerged from the research process and data collection. These reflections provide context for understanding the strengths, limitations, and recommendations discussed in the subsequent sections.

Data collection primarily involved semi-structured interviews conducted via Zoom videoconferencing. The use of multiple recording methods, including audio, live transcript, and video/audio, ensured data integrity and accessibility. The flexibility in data collection methods allowed for adjustments to focus areas based on emerging threads of interest. The iterative nature of data collection and analysis enhanced the depth of understanding of participants' experiences. The technology afforded by virtual video conferencing also expanded the study's reach. Through this process, I discovered words to describe why I value the collaborative co-constructive of ideas, and in this case, of research. The Constructivist GT approach facilitated a dynamic and iterative research process allowing continuous refinement of the emerging theory. It acknowledged that research is not an exact depiction of reality, but an interpretive portrayal shaped by interactions between the researcher and participants. Symbolic interactionism (SI) served as the foundational theoretical orientation for this study's methodology. It provided a lens through which to understand the symbolic meanings and social interactions within the context of Constructivist GT. SI emphasized the role of language, communication, and interpretation in social interactions. It helped in understanding how trainers assigned symbolic meanings to their experiences and how these meanings influenced their actions and perceptions. It also helped me to parse apart where experiences converged and diverged.

The data analysis process included open coding, constant comparative analysis, and memo writing. Coding played a central role in dissecting the data, identifying initial codes, and organizing them into categories. The systematic coding process enabled the identification of core categories central to understanding trainer certification experiences. Memo writing served as a valuable tool for documenting evolving ideas and interpretations throughout the analysis. I memoed, coded, organized, memoed, coded, organized, memoed, coded, organized, repeating

the process over and over and over again. I constructed and deconstructed and reconstructed the stories and experiences the participants entrusted to me. As I trusted the iterative process, the core themes emerged as if I were using a sieve to sift rocks from the sand. Returning to the actual words spoken and the ways those words were spoken was instrumental in giving me the confidence that I was uncovering the multifaceted experiences of trainers. It also highlighted the importance of acknowledging subjectivity and interaction in understanding the complexities of trainer certification.

One noteworthy aspect of this research process was the utilization of poetical inquiry as a supplementary method for analysis. Poetical inquiry involves creating poems from interview transcripts based on participants' words and phrases (Butler-Kisber, 2020). It offers a unique way to explore and represent participants' experiences and emotions, aiming to evoke emotional connections and make research findings more accessible and relatable. This method adds a creative and artistic dimension to the analysis, enriching the depth of understanding beyond traditional qualitative research techniques. The value of poetical inquiry was the most surprising aspect of my analysis efforts. During the time I was completing data collection and engaging in analysis, I was enrolled in a graduate level qualitative data analysis course. The professor exposed me to many methods I had never considered. Frankly, some of them felt so artistic or abstract that I was very skeptical of their pragmatic value. Besides, I already had my methodology cleanly mapped out, and I was not interested in making changes. But poetical inquiry awakened something in me. I created poems from interview transcripts wholly based on participants' words and phrases. I aimed to evoke emotional connections and make research findings more accessible and relatable. For one of my data analysis course assignments, I created a poem based on one participant's transcript. I feel inadequate to fully describe what that poem

did for me. It brought the essence of that participant's story so clearly in front of me that it took my breath away. Coincidentally, I wrote the poem while I was at a conference that included trainers from the professional development system I was studying, and this participant was present. During one session we attended together, I shared the poem through text from across the room. I watched as they received and read the text. The way their body reacted was intense. They texted back, "Wow this is word for word. It's weird to hear your own words played back to you. But this inspired me to read it. Thx [sic] so much Sara Jane" (personal communication). As soon as there was a break in the session, the participant quickly found me and said they would treasure the poem forever. Even before sharing the poem, I knew it was important in conveying their story. However, their response solidified that knowledge. Regardless of whether others who read this study find them valuable, the poems are my gift back to the participants. Yet, in the true nature of constructivism, the poems are actually their gift to me. There are no poems without their stories and there are no poems without my study.

This study's research process and data collection were characterized by a collaborative and flexible approach, grounded in SI and guided by Constructivist GT principles. The iterative and reflexive nature of the process allowed for the emergence of a comprehensive understanding of trainers' learning experiences within the context of certification programs. Poetical inquiry added a creative dimension to the analysis, enhancing the emotional resonance of the findings. These reflections highlight the richness of the research process and its contribution to uncovering the complexities of trainer certification experiences.

Summary of Research Implications and Conclusions

This chapter delved into the findings and emergent theoretical framework of the study, shedding light on the learning experiences of trainers who have completed a professional

development certification program. The core themes that emerged from the data provide valuable insights into the multifaceted nature of this journey. The emergent theory encapsulates the dynamic nature of trainer development, highlighting the importance of evolving learner identity, well-structured process supports, active learner engagement, leveraging adversity for transformation, and the pivotal role of formal and informal support systems such as developmental relationships and peer learning. The theory emphasizes that growth and transformation are ongoing processes that extend beyond certification. The implications of the study underscore the need for a human-centered approach to professional development. They accentuate fostering supportive relationships with coaches and mentors, cultivating a vibrant peer network, and providing structured supports for trainer development. These implications offer practical guidance for enhancing certification programs in the field. The study's significant contributions to existing theories in professional development, adult education, and transformative learning were presented. By aligning with constructivist and sociocultural theories, it emphasizes the role of social interactions, developmental relationships, and reflective praxis in the learning process.

I reflected on the research journey and acknowledged the strengths and limitations of the study. While the qualitative approach allowed for in-depth exploration, potential bias and generalizability limitations exist. Recommendations for future research were offered and include further exploration of the impact of diverse learner identities and the long-term effects of certification on trainers.

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APPENDIX A

Co-Constructed Poems

Appendices A-J are poems I co-constructed with participants solely using words and phrases pulled from their transcripts. The structure of the poems is meant to convey the rhythms of speech and evoke a connection between the reader and the speaker. Each tell the certification story in the voice of the participant.

Sometimes We'll Skip the Things That Are Uncomfortable *Participant 1*

I'd make the joke that I thought I was a good trainer
Until I entered into the training development system.

I went going in thinking,
Of course, I can read a script.
Of course, I can present material.
Of course, I can memorize concepts and activities.
But what happened is we had these core competencies,
These goals, all of the dynamics of what the training was going to be.
It was really intense.
I mean, I had great preparation.
I had all of that.
But I felt the intensity.
It's just the intensity,
It's just so much to learn in a small period of time.
You know you're bringing in these competencies,
You're bringing in a script,
You're bringing in all of this learning.
It tests you, your awareness of your skills.
It's something different.
It's going to stretch the way that you learn.
It's going to give you different perspectives about the learner
And about yourself.

I really think probably the beauty of it,
Or what I love most about the process and the system
Is that it's well supported.
There is help along the way.

And there's also experienced people that will help you figure out how to reflect
 And how to explore that self-awareness.
 And to get you to that place that pushes you a little bit
 And stretches your knowledge and experience.

It was going through and working with these amazing trainers
 That allowed me to really see my own gaps in terms of my training skills.
 There were things that I never noticed that,
 Without the support of a TDS or a Mentor,
 I would have never thought were an issue I would have never noticed.

I love that I was able to have somebody to think with and say,
I didn't realize I was doing that.
How do I change that?
What are some ways that I can improve?
 To get me thinking about why I say what I say,
 Some of my nervous habits, things that I never picked up on.

It was just,
 I don't think you would ever get that [outside of this network], you know,
 You don't have that kind of ongoing support when you just get thrown into a position.
 You get thrown in and
 You don't even know what you don't know
 About training and being effective.
 I would complete a training and I would say,
Okay, that went well, I think people got it.
I think we're gonna see change.
I think they understood.
 Yeah, close the book that, chop, that training was over
 And we move on to, you know, it's 6 months. Do a retraining.

But one TDS really awakened in me the reflective process.
 In between those training sessions,
 Before lunch and even after,
 We spent very valuable time talking about what I was doing
 And how I was doing it in training.
You know what, I noticed you did this. Tell me more about this? What do you?
What are your thoughts about trying this strategy?
 There were so many opportunities to pause and reflect,
 Pause and reflect,
 Pause and reflect.
 It really impacted the way that I look at training
 And what was important as a trainer.
 I never realized the importance of that self-awareness,
 But also awareness of what was being received in the room,
 How participants were engaging.

There were so many levels to that reflection,
And changing, adjusting my questions and my statements to be more reflective.

That was something that shifted the way that I've trained ever since.
And even conversations, not even just in training.
But when I'm working with a provider, with a trainer, with another colleague.
Those reflective strategies and thought processes. I use it.

The first Level, I was sweating and just trying to get it all right.
Memorizing.
Try[ing] to accomplish this and be effective.
Working so hard at it.
And then,
I'm starting to see the shift
I'm starting to see things really flow.
I'm starting to feel more confident about what I'm delivering
And there was a point where people were saying,
This is incredible!
I got it. I understand.
Or the homework reflected it.
And I also felt that same way,
The same way the participants were feeling about the material.
I was feeling the same way about the delivery of the material.
We had the learning journey together, the group, myself, and the TDS.
There was that one moment that it was like
Oh, my gosh, this worked!
And that's where I really became a believer.
I felt more confident and more brave to try some of the strategies as I did more training.

[The TDSs] push my learning, stretch me,
Got me thinking in places that I would have not probably on my own gotten to.
They asked questions that supported not just the good things that I was doing.
They were noting those strengths.
They were really identifying who I was.
You know you've got this, you do this very well.
There were those great conversations about what I was doing,
But there were also ways that they were getting to what I needed more support on,
Or what I wasn't doing at all,
Sometimes we'll skip things that are uncomfortable.
And I noticed that they were able to get me thinking about some of the competencies And some
of the areas of growth that I might want to explore a little more
Because I didn't even know that there were gaps there.
I wasn't aware of what I needed more support on.
So they had a really unique way of getting me to that place,
To get to those conversations.
They would frame a question to get me to think about what I was doing

And then an open-ended question where I thought,
*Oh, my gosh! I would like to try, you know, to improve in this area,
 Or I'd want to refine that particular skill.*

There was reflection and self-awareness.
 And I think that's where it happened for me,
 And that was the disorienting dilemma.
 I never imagined that it would be so important.
 I'm not saying that I never reflected,
 But the depth of reflection, the depth of self-awareness,
 And noticing who we were as trainers.
 That's what happened.
 And that's what changed for me.
 I changed the way that I train,
 And the way that I perceive training and learning.
 That was where it happened.

And what changed would be the awareness of myself as a trainer.
*How do I want to be?
 What do I want to come across as a trainer leading a particular training?
 Who am I?
 What is the purpose?
 Why am I doing it?
 What is the rationale?
 Why am I taking people's time to deliver this information?
 And what's my ultimate goal?*

It reframed the way that I approach conversations in my work,
 And in a lot of other areas of my life, too,
 If I'm trying to even engage with family members or adult children,
 I think,
*what is the purpose? or Why are we talking?
 You know, What am I trying to accomplish in this conversation?
 And what is the focus?*

Going through this process really taught me that people learn
 And understand in a unique ways.

It was a big deal that changed the way that I thought
 And understood relationships and communication.
 I'm still learning to be honest.
 I continue to grow.

APPENDIX B

Sometimes, I Think the Thing That Scares You Most is the Thing You Need to Do
Participant 2

I was pretty young.

I felt not super prepared,
 but I did try to draw on my experience,
 Then kind of apply that.

At first, it was just like, *I'm gonna do what?*
 It was just kind of like, maybe a little bit of 'deer in the headlights.'
 I'll just, you know, do whatever they say I need to do.
 I was definitely nervous.

Maybe I didn't consider myself to have those skills,
 I guess the competence and confidence at the time.

Sometimes I think the thing that scares you the most is the thing you need to do.

[Training] was not something that I had seen on my horizon.
 But once the opportunity presented itself,
 I was into it.

It's an intense process.
 Thorough.
 Definitely a learning experience,
 A growth process,
 Which I think is beneficial to everyone involved.

I remember my co-trainer's realization of how intense the process was,
 And since I didn't know any different,
 I would have just thought like, this is how it is.
 I saw that the process was really intense for someone with a lot of experience,
 And was like,
Alright, I really need to take this all in for the experience that it is
Because clearly,
This is a big deal.
 I wouldn't say that influenced me in a negative way.
 But I do remember thinking like,
This is a big deal. This is important.

Being a trainer is really just a series of disorienting dilemmas.

There was a lot of intentional thought behind it.
 And the approach to it.
 It wasn't just like, *Oh, you want to be a trainer. Here's a script. Go ahead.*
 It was a very intentional approach to training,
 And not just to the training itself,
 But the growth and development of the trainers.
 There's chances for practice,
 Reflection,
 Skill-building,
 Mentorship,
 Peer sharing.

The competencies [were] a bit overwhelming, at first.
 We were looking and trying to see,
Alright,
What am I doing? What am I good at?
 Looking at them all at the same time was just overwhelming to me.
 Like, I can't.
 Especially as a new trainer,
 I can't focus on all the competencies all the time.
 Picking out a few key ones was most helpful.

I think what helped me to learn, build skills,
 Was the reflection on just really small and specific pieces of the training
 Or watching instead of trying to evaluate
 Or be evaluated as a whole,
 Like *Did I do good, or did I do bad?*
 [The TDS] was like,
Let's just reflect on this one section.
What strategies did you use? What strategies could you use?
 And then, noticing or trying to notice the impact on the participants.

And that's where it became really helpful to hear others' observations
 Just having someone else there to bounce back ideas or reflections.
 The concrete feedback was minimal.
 But the reflection time was really helpful.
 And also can send your mind in circles at some point
 Like, *What am I doing? Why am I doing it? Is it working?*
 But overall, reflection is really beneficial.
 I don't know if I had ever been so intentional,
 Or thought so much about a process like that before.

[My TDS] talked a lot about *What data are the participants giving you,*
And what kind of reactions?

And that was really hard for me to observe and understand for a while.

I'm like, *What do you mean? They're just looking at me.*

I don't know what they're telling me.

Or I didn't necessarily have the brain capacity to both, to, you know, memorize my section, facilitate that, and pay attention to what was going on,

Each person played a very different but significant role,
just because they're, you know, different people with their own styles.

I think if my co-trainer weren't there
Or if I didn't have another person going through it with me,
My experience would have been significantly different.
It was so valuable to have a peer, just like having the Mentor.

With my Level 1 TDS, the reflection just really stands out,
And just being really intentional
And thinking about what you're going to do,
How you're gonna do it,
And then, *How did it go?*
And what might you do next time?

My Level 2 helped give me the confidence
That I was on my way to being a full-on competent trainer
And being treated like a peer from the beginning.
We really were planning together,
Thinking about each day,
Like how the day went and
How we can support participants the next day,
Solving some logistical challenges together.

And then with my mentor for the year.
I enjoyed being connected to an experienced trainer

The peer learning aspect of it, I think, is what kept it exciting for me,
And motivated me to keep growing.
The, you know, trainer collaborative.
Otherwise, I think I'd feel completely isolated
And just show up to training with, you know,
Whoever I'm training with and hope for the best.
Whereas now I feel like I can show up to training,
And we have a joint understanding of the approach and such.

I feel like I can learn from everyone,
Whether they're new or they've been doing this a long time.
In my experience with the trainers,
Everyone's had such a growth and learning mindset that

Even if they're brand new,
They have, you know, ideas and thoughts about training.
And sometimes those people you learn from even more
Because they are really in the growth mindset.
This is new to them, and they're trying so hard.
And they're doing new things and learning new things.
And you can kind of remember, like,
*Oh, yeah, I remember what it was like to be new to this,
and have all these things swirling around in your head,
and working out these ideas and reflections.*
I think about people, many of whom have done this for a very long time,
But they continue to seek growth and learning.
And I think that's been the most impactful thing to me about this group,
Just seeing experts in this work being so humble
And knowing that they want to learn more.
Not necessarily knowing they have more to learn, but just constantly seeking that.

I remember, I think my first or second trainers' meeting,
Walking into the room and feeling initially, thinking, like
Am I cut out for this?
And instantly that was like, you know, huge relief,
The people in the room are so welcoming,
And that growth mindset.
I think if I would have walked in and you know everyone's like,
*Oh, I've been doing this for 20 years, and you know I know how this goes,
And I'm good the way I am.*
I might have felt a bit more out of place unless I feel I can grow and can continue.

I grew a lot in the process.
I think I definitely grew in confidence and, hopefully, competence.
I started and did not see myself as a trainer or facilitator
And ended really seeing that role as a possibility or potential,
Seeing myself in this new way.

APPENDIX C

Now I'm Killin' It Participant 3

hey, man,
 it'd be cool if a guy like me
 a guy from big town,
 a city guy
 come from nothing
 and have the privilege to
 kinda sprinkle my sauce on what's being taught
 in my language
 in my style

when I looked around
 it was dominated by women
 I said *it'd be kinda cool to get a dad's perspective
 or guys perspective and
 put that lens on it.*

and in your mind, you think, *I'm gonna be a trainer. It's gonna be a cakewalk.*

I remember having to almost like prove yourself, like,
*what's your experience?
 why would you be good for this?
 have you ever trained before?*

I almost said, *You know what?
 I'm good.
 This is too much.*

it was a lot.

you really have to wanna do this, to go through this process.
 you really have to be intentional, right?
 because, like I said, I almost said, *Forget it.*
 and I think you walk away knowing that,
 hey, they're not letting just anybody come in here and train, right?
 so, you're not just getting any Joe off the street.
 this is somebody that's committed.
 this is somebody that is dedicated.
 and this is somebody that's gonna put in the work from the jump,

and it wakes you up like,
wow,
I have to do all this just to be a trainer.

but I had a support system
I had people that understood diversity
and those people would push me,
I'd say, *Hey, you know what this is too much.*
I'm good. I got enough going.
oh, I don't want to go through this,
so if it wasn't for my support system,
I think I would have given up.

I feel like whoever set that up set me up for success
it has allowed me to grow
to be able to reflect.
to be able to challenge yourself.
and see, okay, where are the gaps?
what do I need to work on?
you're always improving.
you never arrive, right?
you always can do something better
you're always looking at it from a different lens,
and to be able to bounce those things off somebody.
I think it's significant.

I'm gonna be brutally honest,
you see people and you judge them right? You have these implicit biases.
and you're like, *oh, this is not gonna be fun.*
this is gonna be boring.
and you really have an opportunity to learn from people who don't look like you.
whose personality is different from yours,
and some people may see this as a bad thing with training,
but you're always gonna be paired up with somebody,
and it's been my experience
it's always somebody that's different to me.
I come away with so much knowledge, so much wisdom.
so much insight.
and so I always get excited.
I don't have a preference who I train with because I'm learning so much
I may get a older white woman. Here I am, a young black guy.
and I'm like, Okay, this is not gonna be fine, and it turns out to be fine.
you always will walk away with something.
you always walk away with something.
and so those differences, those different worlds, those different perspectives.
they collide.

and you come away with something every time.
so that's the training experience

and now look at me
now I'm killing it.

I'm killing this

I love--This is my favorite part.

and so to see that it's, it's encouraging. It's encouraging.

and it makes you feel like, okay, one day I'm gonna have an opportunity to mentor or someone
else that came in just like me,

and I can remember and look and say,

and I could say,

hey,

I struggle with this too.

and I can encourage them, and say,

hey,

trust me.

a couple of months down the road, you gonna be all right.

but to have that support system in place,

a lot of organizations don't have support in place like that.

Now it's, it's a part of you.

APPENDIX D

Oh, Look at Them! Look at Them! They are Doing Something! Participant 4

I had no intent of going anywhere.
 And then this role just kinda came across,
 And it wasn't really clear at the beginning
 The whole training piece wasn't like exactly clear.
 It was undefined and I probably didn't know,
 Really, the right questions to ask,
 It was, *Holy cow, this is intense!*
 We were like swooped right into it.
 Right away we came in and hit the ground running.
 It all just like happened so fast.
 And none of it was easy.
 It shouldn't be easy.
 It should be something that you really are serious about,
 And you are really working hard towards.

This isn't just something to do, you know, just because.
 You really have to be in it and want it because it is hard.
 I do love how it's set up with the levels
 And the progression of involvement becomes more in-depth with each level.
 You know it is hard, you know, not gonna lie.
 It is hard.
 There's so many things that you have to pay attention to.

I was so nervous.

But it quickly all fell into place.

We went through the training again just so that I could sit and observe,
 And kind of wear both of those hats like, you know,
 I was both observer and participant.
 You know, just watching them like a hawk,
 And trying to learn from the trainer piece,
 And then as a participant like,
What is this feeling like being in this training space?
And Okay, what do I need to think about as a trainer myself?
 I found it [observation] valuable,
 I really paid attention to how [the trainers] were,
 how they were saying things,

how they were asking questions,
 how they were giving instructions,
 and watching everybody else's reactions to see
Can you read their expressions?
 You know, *What body language?*
 That kind of thing.
 So, I was obviously paying attention as a participant,
 But really trying to watch things that they were doing as trainers
 And take little tips, and then I would stay on.
 They [the trainers] probably got annoyed with me,
 Cause I would stay on afterwards, like, ask some questions.
 I value that experience of having to go through it myself before teaching it.

I really want everyone to have a great experience.
 I really take it to heart, and not so much like a perfectionist.
 I want to treat others how I would want to be treated.
 So, I'm continually thinking, like, *If I was in that scenario,*
How would I want support?
 Or *How would I need this person to be?*

So, something that I learned is that
 I really needed to have my parts and go through them.
 And my first TDS was just so kind to bear with me because
 I wanted to go through every script.
 You know, I had module one. I had my page of notes, module 2.
 I had my page of questions and notes, and so we spent hours.
 We broke it up over a couple of different days,
 Just going through, you know, reading through.
 I'm like, *Okay, on page 2, you know, I have this question.*
 Or she would give me little tips like,
Oh, here's a good spot that if you have an example, like a real example, that you can give.
 And so, for me, I figured that I needed to work out the roles,
 Who's doing what, go through it, come together, go through it together.

When I moved to Level 2 with my next TDS I was like,
Hey, this worked really well for me in Level 1,
Can we do this again?
 And she's just like, *That's fine. If that will work for you, then let's do it.*

And of course, then I didn't have as many questions.
 But still, you know, there's all those logistics
 But it's just all those little things.
 And so just learning everybody's things like that,
 And just the little tips and tricks because they've been training for so long.
 So they have these extra, you know, like,
Hey, we've noticed over time that [the participants] are really not understanding this piece.

*And so when we get here, here's what we're gonna do.
 We're gonna, you know, share more information or go to, you know,
 Go to a spot and show them something, you know, to clarify.
 And so for me, I pretty quickly learned that that style worked well.
 I was just like madly taking notes in the script
 Because everybody has their own little tweaks to it
 Or I'm like, *Oh, I like what she said*, you know,
 Trying to add in a little extra comment or
 Something to really reinforce something.*

*I liked having documentation and written reflection,
 You know things written down, the 'so what?'
 What I found helped me,
 Was having a space where I could capture all the goodness I learned,
 From my TDSs and co-trainers
 And those little notes, I would use that space
 And put in some things that I wanted to incorporate into my script
 And also be more accountable when it's written there.*

*I mean, it. It felt crazy, but I followed.
 You know, you stick to it.
 It's like, you know the script is all well-written,
 So, if you just follow along...
 I feel like each time I keep improving.
 Figuring out all those logistics and stuff.
 That was pretty nerve-wracking to try the first time.*

*[The competencies] were really helpful because there's so many parts and pieces.
 So, it was really helpful to see [the competencies].
 What things that just are maybe more natural
 Or good to go,
 And things that I don't really have to think too much about.
 And then the other things that are like,
Oh, yeah, I really need to focus on that and think about that.
 And so those were big things, you know,
 And I remember my first TDS telling me, when a participant would answer a question,
 And I would just say, *Thank you*, or something like that.
 And she's like, *Okay, now think of something else. Try some paraphrasing,
 Or something more than just that.*
 And so, it was great to have the competencies where I could say,
Okay. I'm really focusing right now on this particular [skill]
Not a bazillion things at once.
Today, this live session, I really wanna focus on my paraphrasing,
 And really start working my way through those.
 But I really needed to hone in on it.*

So all those nuances of you know,
 trying to read everybody's body language,
 And just make sure that you get the sense that people are understanding.
 They know what you're saying and following along.
 It's like mentally exhausting because there's so many things that you are trying to hold in mind,
 you know, and all the competencies.
 And you know, then you do something you're like. *Oh, crap! I forgot to do that.*
 And so there's just so many things
 You gotta know your co-trainer.
 You gotta learn how to read them.
 And just all the things coming at you when you're [doing] tech,
 And you've got, you know the chat,
 And then people coming and going,
 And you know cameras and volume.
 So that itself is a big piece.
 And then you're putting this training on top of it.
 So that whole setting was just new to me,
 and trying to learn all the tech and navigate everything.

You're being watched.
 You're trying to make it all work out.
 And really the thing for me is that I still feel like it's like a huge responsibility.
 I mean, people are paying to send their staff for you to train them.
 It's just such a huge responsibility.
 And you're trying to hold onto that responsibility of, you know.
Are they really getting it? Can they go out and do this, you know?
 That's huge, but I mean still, it still carries with me,
 Making sure that you're just doing everything right.

[My co-worker and I] had very different experiences.
 So I felt very fortunate, cause I would share things,
Oh, my gosh, my TDS and I spent, you know, 2 hours and we got this done
 And she's like, *Okay, I had a 15-minute meeting.*
 So I always felt bad because I felt like I was getting so much.
 Our experiences were very different.
 But we had each other and had she just been solo,
 She would have thought that that's what it was and I would have thought that that's what it was.

I'd like to have had more concrete steps, but that might not fit everybody.
 So you know my steps of doing what I did with my TDSs worked.
 But that might not necessarily be what others need,
 But then you don't want people to miss out on something.
 So maybe kind of like, *Here's some ways that that things can be done*, you know.
 So that's something maybe to think about.
 How much time is really being spent? What do they do? What do they get?
 And who's really doing more?

But now, having gone through the process,
And still having the support,
And continuing to learn in our book studies and stuff,
I feel like I have disorienting dilemmas when I attend other people's trainings cause I'm like,
Oh, no. Don't do that. I have a book to share with you, like here, learn some things.
So it's so hard to not pick apart some things.

There's a lot more things that I think about and consider
That are constantly running through my head now.
I am much better at paraphrasing and facilitating and practicing the pause.
I'm much better at just sitting and waiting.
And I think that's really even carried through into some parts of my personal life.
And even, you know, even just my state office work.
You know, just in a normal meeting, and just sitting more and pausing.
And you know just letting others reflect, or just have that time.
I know that there's several differences in [me and my co-worker], cause there's, you know,
People on our team that are like,
*Oh, look at them! Look at them. They're doing something. They're, they're doing something. We
need to do that, too.*
Those really increase your self-awareness.
It's not just that they increase competencies,
But just paying attention to yourself.

APPENDIX E

It's a Place of Becoming, You Know? *Participant 5*

I had 2 other colleagues who'd been training awhile. and I just learned from them.
 I was 24, 25-years old, so I was very young.
 They were in their forties already,
 and so they've been training a while,
 had a lot of experience,
 and they really taught me a lot of things.
 So I watched them.
 I helped them.
 And that's really where I started learning how to put together training
 And facilitate and do all those things.
 And I remember just being like super, super nervous.
 I used to get a knot in my stomach before having to train or facilitate.
 And now I can think back,
 Like it used to take me days to create a training or present.
 And now I can put things together so easily and quickly,
 And I don't get nervous.
 I mean still get a little nervous.
 But you know, I just remember how I felt before, and that was way different.

I believe [learning] is a partnership,
 That I have some ownership of their learning experience,
 And they have ownership of that learning experience.
 So that really drives a lot of my approach.
 Strengths-based work for sure,
 believing that everybody has within them the capacity
 but that people are all coming from different places, too,
 and really honoring those experiences.
 So I think by nature I am more of a facilitator than a presenter
 and that kinda took me some time to really understand about myself.

When I was introduced to [this organization],
 I could see how they really used a strength-based approach,
 And they didn't just say it.
 But everything was connected to that.
 It wasn't just a saying,
 It was like everything.
 It was the way that we did things.
 The approach was aligned.

I kind of notice when things are out of alignment, right?
 Like when things don't jive.
 When the behaviors don't line up with what we say.
 And that really bothers me.
 But also, when it matches up, like here,
 It's like, *Okay, I wanna be part of this.*
 So I really felt like I saw that from the very beginning.
 How the approach really honors families,
 No matter how much money, or experience, or knowledge, or education.
 It comes from a place to honor families and their experiences.
 So you know it was an easy decision.

[The certification process] is focused on development.
 If you are ready to explore yourself,
 If you are wanting to challenge yourself outside of a comfort zone,
 If you want to dig deep,
 That's what you do in the process.
 Reflecting on self,
 Thinking about how you can do things better,
 Who you are in this life, you know,
 What you bring and how you're willing to be challenged
 And kind of dig deep into that.
 That's the process.
 That's really what you're doing.
 And it's grueling, you know.
 It's taxing like energetically, energy-wise.
 You give a lot mentally in preparing.
 And, so I would say, it's pretty taxing.
 But in a good way, you know,
 Like when you get a good workout, like that was so hard.
 But then you're stronger like that.

And so, when I had [my TDS] meeting with me before training,
 To help me plan, to talk through something, answering questions,
 And then I actually delivered the section.
 And then afterward, there were questions.
Hey, so I noticed on this part, that you did this.
Why do you think you asked it this way?
How do you choose?
 There's a question [my TDS] asked me:
How do you choose what stories you choose to share?
 And I was just like, *I don't know. I just say it when it comes to mind.*
 But, you know, those questions lift you up to think about
 The why of what you're doing when it was not in your consciousness.
 You know, those kinds of coaching questions.
 It wasn't her just asking questions for her own information.

The question was for me, you know, and so,
 Because I felt a certain openness and trust with her,
 I didn't feel like I needed to justify, but it just kind of made me go,
Hmmmmmm and think about it.
 There has to be an openness to a challenge,
 Openness to learning about self,
 Or else you're always gonna feel defensive.

And it was all that kind of feedback loop.
 It wasn't just, I go out there and do it, and then I get evaluated.
 It was coaching all along.

I do remember when [the competencies] came out.
 I thought, *Yeah, this is what we need.*
 I remember there was a question of like,
How are we holding us all to a standard, that we are world-class?
 We need to be world-class at what we do,
 And we need to be striving and growing to do that always.
 That's the expectation.
 Every trainer needs to be held to a certain standard.
 So the competencies, to me, answered that question,
How are we holding people to a standard?

It's part of our core values to be learners.
 You know, parents being learners,
 Supporting parents and learning,
 We have to be a learning, growing cadre.
 So if you have some people who are like,
No, I'm doing it this way. I don't care what adult learning says.
 And you see other behaviors that are old and archaic,
 It's like we're not gonna survive holding to these archaic methodologies.

You know, in those levels [of certification],
 The process was affirming of things I felt like I always believed:
 Strength-based, listening to your families, or listening to people's stories,
 Honoring their story, facilitating.
 I'm not standing up here always telling you what to do.
 But before, I was more self-centered, and after
 I would say I was more responsive.
 Before I was more, like, winging it.
 And after, more intentional, more thoughtful, in the moment,
 Using thoughtfulness centered around the participants.

I was a pretty good trainer-facilitator before, like,
 People enjoyed it when I trained or facilitated something.
 But this [certification] drove me to a different level.

I realized that if I was more intentional, I could support people.
 I wasn't just entertaining them,
 I was helping them to grow.
 And that was definitely a shift in learning, going from,
Oh, you were such a great trainer; I got good feedback.
 But now the feedback I'm looking for is,
Did they have a great experience? Did they go,
Oh, man, really my eyes were open to some new things.
You know, I am now really understanding what it means to be a partner.
 And I guess it's the old 'Sage on a stage versus guide on the side.'
 But, like, you're moving from being an entertainer to being a facilitator.
 Yeah, where you just kind of stayed in the background.
 And they're learning.
 They take center stage, not my teaching.

The thing that has been really interesting is at the beginning,
 Where I came in,
 I was like, *Man, this is like a tight group of ladies.*
They've known each other a long time.
 And I was very on the outside.
 I mean, I had my couple of people that I went through my levels with.
 But over time, you get to train with a lot more people.
 It was an unexpected plus, right, that you get that.
 I'm like, oh, *I get to train with so and so and so*, and you meet people.
 You know, you really do get relationships across the nation.
 We are getting to meet, and growing relationships across people.
 So now, when I go to a trainers meeting, *Oh, my gosh!*
 Now I can walk around, be like,
Yes, I've gotten to know her and her and this trainer and that trainer!
 Even if I don't know them really, well, it's like a very familiar place.
 But I think that speaks to the structures that have been put in place:
 The working agreement, the expectations of the core competencies,
 A common expectation and standard of what we're all really trying to deliver.
 I feel like that makes a camaraderie.

And then the other thing I think of is just...I'm gonna cry, Oh, my God!
 But, like I wanted to say this for a little while.
 [This] has been a workplace that has provided me the opportunity to be a mom,
 Work from home,
 Given me learning and professional development experiences,
 And let me be the parent that I want to be.
 And when both of my children were very little,
 It was really hard for me, it was weird and hard for me.
 It's funny, because, you know, here I am in this world,
 And supporting parents, and that infant age was so hard.
 And just so many things like internally.

But I feel like [this organization] held me during all those years.
 Like in a real, practical sense.
 With information. You're hearing it, and, you know, when I'm teaching it,
 I'm like reminding myself of it, right?
 Practical information.
 But also, relationships with women that I'm like, *Oh, my gosh!*
 Like so many amazing women that have just held me in lots of different ways.
 And in different times.
 And in different levels.
 Women who I admire so much.
 And the things out here that other trainers are doing in their personal lives,
 Professional lives.
 It's like inspiring to me.
 And I just feel like [this organization] has brought me to be able to experience that.
 It's like you all have continued to grow me as a professional,
 With different things you supported me through.
 Always being part of that like,
Hey, read this. Here's this webinar. Here's a class for free, you know.
 I mean, I'm just like, *Wow! I got to do that!*
 Use it for [the organization] and also use it for all my community development stuff.
 They have just grown me, invested in me.
 I feel like it's just held me.
 It's been something I've been thinking about.
 It's been on my mind.
 I know it's not necessarily connected to the certification, but you know,
 It's funny, I talk about [the organization] like it's a person.
 It's hard for me to describe how much it's done for me in lots of different ways.
 So thank you for letting me share it, talk about that because,
 I picture myself at my retirement speech just crying,
 And like naming all these women,
 And I'm not, I'm not lying.
 I'm not exaggerating when I say over and over and over
 That the women that I get to know through this,
 Oh, my gosh! Amazing people!
 I grow continually.
 I don't have to put on a front for who I am.
 I can, I can show my skills or my competencies,
 But I can also grow and lean into that becoming rather than performing.
 It's a place of becoming, you know.
 And we don't sit still.
 Like, we just keep going.
 And that's not for everybody.
 Like, some people can't handle change.
 But we really dig into change and say,
Okay, we did this really well, what next? What next?

APPENDIX F

Give Yourself Some Grace *Participant 6*

Okay, I always said I would never train.
 I generally have been very quiet and shy and kind of just keep to myself.
 And so, I've been working very hard to get over that,
 Over the years I've kind of... stepped more and more out of my shell.
 And...this opportunity was... I was kind of tapped on the shoulder and told,
Hey, I really want you to apply for this. I really think you'd be good at it.
 And it was, you know, somebody I respect.
 And so I said, *Yeah.*

Now I like being a trainer. I enjoy it.
 I enjoy especially when I'm training on something I am confident about or believe strongly in.
 And it's the parallel process.
 So, if you have good state support, good program support, you know,
 It just goes down the line.
 I love that parallel support.

I believe in being open and available,
 And the back-and-forth conversation,
 That it's not just me doing the training.
 It's a group process where I can help to make a safe space,
 Encouraging that safe space so that participants will participate
 And get the most out of what they can.
 I mean, you can talk all day,
 But they have to accept it,
 And process
 And use that information in order to learn from it.
 Come at it with an open mind

It's not always easy when you do get into those conversations
 Where people don't agree with you, right?
 I mean, that can be challenging.
 Especially when you're training on something that you're passionate about,
 And you know, you have somebody that's like,
Well, that doesn't work. That's not how we do it.
 That can be challenging.
 And you have to try and facilitate that conversation
 And try not let it get confrontational
 And just try to understand where they're coming from

And try to see if you can find some common ground,
 Or maybe agree to disagree,
 But yeah, that can be challenging.
 And it can be hard, especially when it's something that you're passionate about.
 And you've seen the research, you've seen the data,
 And you know, that's how you feel, and then you have somebody that's like,
Well, that's not how we do it here.
 Or *That's not what works for us.*
 Or *That's not how we've always done it.*
 And so that can be challenging.
 And it can be hard not to take it personally,
 But you just have to try to take a step back and try to see where they're coming from
 And try to facilitate that conversation
 And not let it get confrontational.

In the certification process,
 Basically, we get trained as if we were going to be parent educators.
 And then there's several levels or steps, where you are kind of brought in slowly.
 But paying attention to other things while you're going through it.
 And then you know, you're brought in to do a little bit of little piece,
 Few pieces here and there,
 And then a hundred percent.
 Then you're kind of with your mentor, never on your own
 So you're stepped into it, it's not just one time and here you go.

The reflection portion with the mentors helped me to grow.
 I got a lot out of my Level 2 TDS and my Mentor.
 By my Level 1 TDS...she was brand new, and I really struggled with that.
 It was hard.

I learned so much from the trainers I observed and trained with.
 My Level 2 TDS, she would tell me, *You are a trainer!*
 And because how much I struggled in Level 1,
 And how many issues I had and things I went through,
 My level 2 TDS was...it was really good.
 She's like, *You are a trainer, you are doing this, got it?*
 She was really good, and really did a nice job of helping me with my confidence.
 And then my mentor, she's just amazing.
 She's wonderful. I can't say enough good things about her.
 And then the first year with my mentor were really nice.
 That helped me just think about what I was doing and how I could do better,
 Because I'm my own worst critic,
 And I am overly critical about what I say and do,
 And nothing is ever good enough.
 Like I really struggle with that.
 And I often have to have other people tell me it's not as bad as I think it is.

My Level 2 TDS was so affirming.
 She said, *Listen, you're on Level 2.*
You're not expected to be...you're not gonna be perfect right now.
Like who's perfect? And what is perfect?
 And things like reminding me, *You're brand new at this.*
Give yourself some grace,
And be kind to yourself.
 And she might not have used those words, but that was the message I took from it.
 And you know, because I wasn't getting that in Level 1,
 And it was almost the opposite.
 I almost felt like I had to have perfection in Level 1.
 But then, in Level 2, it was like, *No, everybody has things to work on.*

I felt a lot of pressure from my Level 1 TDS.
 We met at conference before I started my Level 1
 And that was nice to meet her in person.
 It made it a little bit easier to work with her.
 She was a very kind person, but I think, her being a new TDS...
 I'm sure it was a growing experience for her,
 And I certainly don't hold anything against her,
 But I felt like some of the things she was saying didn't make sense.
 I felt like some of the things she wanted me to do were beyond where I was in a Level 1.
 Some of the feedback felt irrelevant to me.
 And then I had to complete an extra assignment,
 And record it and send it to her,
 And then that determined if I was able to move on.
 And so that was hard because I felt like it came out of nowhere,
 And I feel like, because I'm so critical of myself,
 I mean that played on top of it. That made it even harder,
 I don't know. Maybe it wasn't that bad. Maybe it was that bad.
 I don't know, but I didn't seem to have a problem once I did the assignment,
 And I don't...It was like, *Yeah, you're good, move on.*
 But it just was a lot of weight on me,
 And a lot of tears were shed and a lot of frustration,
 And just was not a good time.

So, then I was on edge when I started with my Level 2 TDS like,
What do I say?
 But her feedback to me was a lot of positive *you did this really well, and you did this really well,*
 and you know, of course, if there's things I need to work on,
 I'm happy to hear, and I'm happy to like, you know, and I did, and then she would say,
Okay, I noticed you worked on this. I could tell this, and this really worked, or, You know,
Let's try this next time.
 So, it was like, *Okay, I can be a little bit more safe. This is a safe place to be.*

My Level 2 TDS and I met after every training day, and I got feedback.
 With my Level 1 TDS, we did not.
 But like I said, she's brand new. I'm not trying to make excuses,
 But I don't wanna just be dogging on her.

My experiences with the different abilities, or skills, personalities,
 Of each of the TDSs and the Mentor I worked with,
 They were just so different.
 And it was nice to end with my Mentor who was just so sweet and positive.
 And she just filled me up and just made me feel better.
 So going from one extreme end to the other, like I just worked uphill.
 And then having my Mentor was icing on the cake,
 And you know so I'm glad it wasn't the opposite way,
 That would have been not so good.
 But there was no one significant event.

That gentle feedback definitely gave me more comfort.
 Especially someone like me, who [uses a lot] of negative self-talk, and you're just like peeling
 down because you got your talk in your head, and then you have the outside voice who's telling
 you, *You need to do this. You need to do that.*
 But with my Level 2 TDS, she could see it,
 And she'd be like, *No, take a deep breath. You're fine. You're doing this, you know,*
 It was definitely helpful to get that positive feedback.
 And the negative feedback can be good, too. It's how it's delivered, right?
 If it's, *I noticed this, and this is how we can work on it.*
 Or *Maybe try this.*
 Or *How do you think you could adjust?*
 That was fine.

Always growing up through high school, through college,
 Like things come easy to me.
 I would go through college classes and not even open my textbook and get an A.
 You know things always came easy to me, and so to struggle as much as I did was hard.
 I never struggled like I did with this.
 I've never had to work this hard for something.
But I'm much more confident and comfortable talking around people,
 And you know, my co-worker and I were just talking today
 Because we have another class coming up and so we were like, okay,
 We're like, *What's next on our calendar? What do we need to prepare for?*
 We're more confident.
 We're still working on things, and we still tweak things. But it's not like, Oh, my gosh! Let me
 pull all my scripts. Let me practice, you know we don't feel the need to have to do that anymore.
 The process has helped my confidence overall in being able to speak in front of people.
 So now for someone who was never gonna train and didn't like to speak in front of people...
 Not only do I train, but we are presenting at a national conference. What the hell!

I still have the motivation, I still wanna be better.
I don't like to do things poorly, I always want to do better,
And improve and grow.
So, the motivation is still there.
I think that's just part of who I am.
We're always doing self-improvement stuff.
We're doing book studies all the time.
And so, we're practicing skills.
There's always going to be something we need to improve on.

APPENDIX G

Those Are Hard People to Forget *Participant 7*

I think I've I had always wanted to be a trainer like in the back of my mind.
 I just never really took the time to develop skills.
 I just was like, *Oh, that'd be fun!*

Someday.

I didn't have any concerns about getting up in front of people and sharing,
 Sharing stories about home visiting or assisting the other trainers.
 But it's a little intimidating at first,
 when you look at the requirements,
 and I thought,
Oh, my, I don't think I can do this.

But I guess what I would say is that
 if you have a passion for helping people,
 and you've done the work,
 that it's not nearly as intimidating as that piece of paper.
 I will tell you that I thought,
Oh, I know [this work] inside and out,
I won't need that much time like that they allocate,
 and I was like *Whoa! I was so wrong.*
 It wasn't about if you knew the content.
 It, it was a little shocking to me, I guess, when I got to Level 1.

It was beneficial to me to just be open and observe and take it all in.
 To be able to see how a number of different people facilitate, their styles,

And, wow! [The TDS played] such a huge role.
 Those are hard people to forget.
 They didn't want me to be someone I wasn't.
 They didn't want me to conform to a certain way to facilitate,
 Which I went in thinking I would have to.
 I can just, I can be me.

I mean, you're on your own.
 But you're not really on your own.
 There was, just to have that scheduled conversation to be able to bring out like,
Hey, this has thrown me for a loop. And this is what I did.

But I want to process with you, like, are there other ways to do that?
 It just, it was so valuable.
 You're always connected to other trainers.

I love the debrief at the end and
 I really appreciated the reflections with my trainer development specialist.
 It kind of forced me to slow down a little bit,
 And think about why I do what I do,
 Or just point out some things I could work on better.
 The nice thing about it is you're never really alone.
 So, if you are struggling with something,
 It was just nice to know that you have a partner,
 That you're doing it together.
 It's not *Okay, you do this, and I do that, and that's it.*
 There's really that partnership there.
 And it...it...it brings anxiety down a little bit,
 So you're more comfortable and more and more real in the training.

And then again, those reflections, you know,
 Writing down things like,
I never thought about it this way, you know.
That's a great way to say something,

And the competencies have helped me grow significantly
 I would go through them and say,
Which one do I want to work on?
Which one do I want to intentionally focus on when I facilitate today?
And, How do I think I'm going to do that?
 So I use those competencies to help me try stuff out if you will.
 I think I picked the low hanging fruit, first,
 Because I wanted to be successful and not get frustrated.
 And then the harder ones. I was like, *okay,*
I don't know if it's gonna work, but I'm gonna try it.
 And I really like to step out of my box every so often,
 because I think that's when we learn the most.

But I think the most beneficial thing that I did is that self-reflection
 You know *I'm gonna try this* and then to reflect on it,
 and not so much mentally,
 but just taking the time to write it all down.
 And I'm thinking, *Oh, wow! I really should do more of that writing down afterwards.*
 I think you just become very honest with yourself when you're able to write it down, When
 you're just processing it in your head, you can easily get disrupted or interrupted.
 And then, I don't think you get the time really to think about
 How you want to change things.

I like to help people right.
And what this really taught me was they'll figure it out on their own,
And I have to be patient with them.
I can guide them, encourage them, but they're going to figure it out on their own and That
empowerment is more important than me just solving the issue and moving on.

I guess I don't even think of myself as a trainer,
but more of a facilitator in the learning process.
each person's responsible for their own learning and knowledge
And I'm just there to help facilitate that.

APPENDIX H

I Can Pretty Much Do Anything After I've Been Through This *Participant 8*

I value education.

I value education as an adult learner.

I value the adult learner and that's important to me...

It's important for me, as a person, as a trainer, to know what I'm training on, to be vested in it.

I want to give it my best it.

It's not something, you know...

I'm going to study, and I'm going to know what I'm saying.

Just not off the cuff.

So that's important to me,

that I know it,

and that I continue to learn as I grow as a trainer.

It was a little scary. Scary!

I learned a lot about myself.

There were times where I would like just cry. It's like, *I can't do this.*

and I felt,

I can't do this.

I can't do this.

But what I finally learned was, I had to take it step by step.

Slow down.

Not look at the big picture of what I had to do to get to this point.

It was, it's a... it's a process.

And I had to slow down,

and I had to teach myself that, to slow down and take it in one step at a time.

And I was gonna get there,

and you know it's like making your to do list for the day and checking things off.

I finally learned I had to do that, instead of just letting it all envelop me in and overwhelm me,

I learned that I needed to slow down and just go step by step, which is,

which is how the process goes.

You know, it's just it's one piece at a time.

I really learned to trust the process,

and I had to let go of my own ways, because it's not just like a college class.

I mean, it's...it's a...

It's a new learning process for me.

And I had to do kind of do that, mind switch, you know,

and let that process work the way it's supposed to.

At first it was like frustrating, you know, I don't want to do these [competencies].
It's like, *What now? What?*

And then the more I let go of that and just started looking at those,
And I'm like, *Okay, okay.*

I like to look at them, not only as the aspect of a trainer, but my supervisor skills.
You know those competencies that I can flip over to that area.
I do like them.

I think we all need to self-check that way,
you know. and be honest with ourselves.

I think we're our worst own judge, you know.
So, looking at those competencies that way helped me a lot.

I think like, in the moment when you're going through everything,
it's like, *Oh, gosh!*

One more thing to do!

They're a little overwhelming.

A couple of them I would have, I would ask my TDS, *Okay, I'm not real sure what this means.*

And then she would explain.

So, I think that was...it was like almost like, *Oh, my gosh!*

More paperwork, something else I have to fill out.

But then, when you got you get to see the why, the why of it.

And, you know, I think we as adults, we have to know the why.

Just like with our families we go to visit, you know.

They have to know why you're bringing this, or why you're doing it.

So I think once I got that in my thick head,
not just another thing to do.

It's not just another piece of paper to fill out.

This is going to help me develop.

I liked my reflection with my TDSs and mentors.

I hit the jackpot with everyone.

And it just carries over into all aspects. Not just my training.

When a training session was over,
we would turn the camera off when we were done,
and then we would just sit and quietly write.
And I think that's really when I could look inside and think
What just what happened right there that day?
how I felt right there in the moment,
and I like it,
the self-reflection, that documentation

The main word for me in that process is support.

I always felt supported.

So all the way up, I just always felt supported.

It is intense.

but I never felt alone.
 It's just so...It's so much information, but I always felt guided.
 It's a lot you have to do on your own and I'm self-motivated.
 I can do that,
 but I never felt left to just hang in there on myself you know.
 So you're just supported through the whole process.
 I just feel that if you don't have the skills,
 you're shown a way to get to those skills.

Every single day in that Level 1, I did my little piece, and I learned so much from [my TDS].
 Just her style of presenting,
 and her after-talk, after [each training session], just taking me in,
 and she listened to me,
 her and everybody just listened to me and like, [asked]
How can how can I support you to get through that anxiety part that you've said you felt?
 and then we would talk it out, and it was just like I felt relief.
 So I think that's memorable to me.
 I go back to that word.
 Support.
 I felt so supported through every process.
 What's memorable in the process is me shutting up and listening to those other trainers.
 And what you can learn from them is amazing.
 And letting their experience just fall into my brain.

So by watching the others...
 Just taking pieces of all these trainers and TDSs and making my notes of what I like,
 What I want to implement in my way.
 But still using [my] way.
 I'm not becoming [this trainer], not becoming [that trainer].
 But building on that puzzle piece of [me], and how I'm going to present.
 I'm not [another trainer]. You know [she] is an amazing trainer and presenter.
 I'm not her, and I've learned then I can't be somebody else.
 Through the mentoring and through my levels with my TDSs, they said
 they like the way I use my humor and that's me,
 that's authentically me,

As far as the process, I just don't think anything's missing.
 I mean, you got all these pieces of every way that we all learn,
 you know, visual and with the documentation and that verbal back and forth with whoever's
 helping you.
 I just think the process is...It's amazing.

It can seem overwhelming. Yeah, the process can seem overwhelming.
 And you think, you know, just, you know, the interview process to get to become a trainer.
 You know, I was like, *I have to video myself doing what?*
 And then I gotta do...you know...So that part of the process...I was like,

Oh, gosh! I don't know, I don't think I want to do this.

I think, my anxiety was impeding it some until I just, I found out someone was there to support me.

Not that I thought the process was gonna be easy at in the least at all.

But yeah, it was overwhelming.

cause I almost stopped.

I was almost like, *I can't take this pressure.*

That, that was disorienting for me.

Now I am way more self-confident in what I can do because I've always wanted to be a teacher, but I also never thought I could do it.

I've had to step out of the box.

And I like it there.

Once I got certified, I was like, *Yeah, I can pretty much do anything after I've been through this.*

But yeah, yeah, I've changed a a lot. I've become more self-confident.

So yeah, I'm a different person because of it for the better...

It's a journey that I am so glad I stuck with and kept going.

And it's just, it's made better me as a person, as a professional.

It has bettered me.

APPENDIX I

I Won't Know Unless I Try, Right? *Participant 9*

I went in expecting one thing, and then you know something different kind of transpired.
 More consistency across the board,
 be upfront and have more clarity on the time commitment and
 Have that support throughout.
 Those are like the 3 main things that you know,
 When I think about my training certification experience.

I wanted to have the opportunity to just to share my knowledge and my experience.
 I felt like this was an opportunity to be able to give back, if you will,
 And also just add something else to my resume honestly.
 I just, I like to be able to not be just a person that just, you know, she can only do one thing.
 She can only be a parent educator, you know.
 Just to have an opportunity
 To have participants have a trainer that looks like them
 Over the years of seeing trainers and talking to trainers,
 There were not, you know, a lot of trainers of color.
 So of course, studies show
 Learners do better when they have a person that looks like them.
 So I guess that's kind of what kind of motivated me to begin this journey in the first place.

I've always been that type of person, that I wanna be able to do different things.
 And I'm a lifetime learner, and I'm always, you know, up for a challenge.
 And, you know, this was a challenge.
 There was a lot of naysayers, like, *Oh, I can't believe you gonna be a trainer.*
That's gonna be too much.
How are you gonna be a trainer?
How are you gonna be doing this?
How are you gonna do this?
 And I'm like. *I don't know. I mean, I won't know unless I try, right?*

And I'll be honest,
 It was sometimes I was like,
Right, maybe I should stop.

Oh, my God! It was just so varied,
 Like it was just high points, low points, you know, expected points.
 Honestly, I'm gonna say, like, when I first started the process like years ago,
 And I had to sit in as an observer.

And you know, in one of the trainings [to observe] and I was like,
Okay, yeah, I think I can do this.

And then it was like miscommunication of what was expected of me to do, and that was almost...

They almost lost me at that point

So like, I say, to kind of move from high points to low points.

And you know, back to high points.

And you know now, at high points.

I'm just gonna say it was intense.

And I guess one of the things that I thought about as I was going through,
 Is that I think it needs to be more disclosure,

Like as far as how much work it is.

You know, how much effort you have to put into it.

Cause, I mean, I heard that it was gonna be tough.

But I feel like once I actually started, it was brutal.

I wasn't expecting how much time I had to put into it.

But I wasn't, I wasn't understanding that, you know.

I had to do all this prep work prior,

Like all these different meetings with my TDS.

And then the time before sessions, and the time after sessions,

And then all, you know, learning to do that.

It was just, the time commitment was absolutely crazy.

If I had known that, I probably would have not done it, not done it at that time.

My TDSs,

They just had different styles, you know, as far as coaching and teaching.

And I'm okay with that because people learn differently and people teach differently.

And I'm okay with that.

But I mean,

When I tell you it was like 2 different spectrums,

It was on 2 different spectrums, and not that one was better than the other.

It was just they were just different.

And I think, based on my Level 1 experience, I thought Level 2 was gonna be a lot easier.

So I don't know if because of what I went through in Level 1,

My expectations were different from my Level 2,

And my Level 1,

I had some experienced people that really helped me learn about what I needed to do, right?

My TDS and co-trainer during Level 1, they were just great, you know.

And it was just more relaxing. I guess if that makes sense like, you know, it's okay.

They gave me a little bit more latitude. And let me know it's okay to make mistakes.

You're new and that kinda, that kind of feel, you know,

But I was also learning in the process, right?

And then Level 2 was just kinda like so rigid, and you know,

So nit-picky and so like, *Oh, you gotta do it like this.*

You gotta do this if you don't do it like this... You know, I was just.
 I just kinda felt overwhelmed.
 But through that learning process, I learned so much, right?
 You know, about the process.
 I learned so much about just what to do as a trainer.
 But at times I, honestly, I felt like, *Nope, this is not for me.*
 But you know, I got through it.

They both wanted me to be the best trainer that I can be.
 They just had different styles of getting there and I mean, that's okay.
 But the competencies were really great.
 The one thing about the competencies is that they were concrete, you know.
 It was really no room for inconsistency around there.
 It was like, *Okay, the competencies are here. This is what I'm looking for.*
This is what I need to do.
And this is what I need to do to reach those competencies.
 No matter who you are, what trainer you are, these are the competencies,
 And they might be manifested a little bit differently, but they are a concrete tool.
 All of us are working on our competencies regardless.
 I think those [competencies] were really a good tool for me to be able to identify
 My weaknesses and my goals, and you know where I needed to start as a trainer.
 And then my ongoing learning process.

I also really value reflection.
 I really think that that was a great tool,
 But again it was subjective.
 My reflection process again, you know, Level 1 versus Level 2 was really different.
 And you know, when I think about that process in Level 2,
 It at times was like pretty stressful, honestly,
 Because the way I saw things or the way I thought things went maybe.
 The perspective was different if that makes sense.
 So you know, I guess I'm thinking about that process we would do in Level 2.
 We would, soon as we will get done with the training session,
 We would reflect, or whatever.
 She was like, *Turn your camera off*, you know, whatever.
Take some time, and you know, *write down*.
 And then we would talk about it.
 And then Boom!
 She would go, *Right. This is, you should take this, you did this, you need to do that,*
 And it's like it...
 It was...
 I don't know.
 So when I think about that, I have trauma, not kidding.
 No, I'm just. I'm just kidding.
 I don't want you to think that it was all bad,
 Because it was not,

Because a lot of it was really good, constructive criticism.
And that's what I need,
That's what a person needs to do better, right?
And I mean, I'm okay with that, you know,
It's just sometimes your approach could be just a little bit different.

I can't say that I think that anything was missing honestly,
Because I think all the supports are there.
I really like this mentoring process with my mentor.
She's awesome and you know,
I think that that mentorship [is important].
If I could say something was missing,
It would probably be good to maybe have that mentorship through the beginning,
Like you know what I'm saying, like, have a mentor when you start.
So when I'm going through Level 1,
I can go to this person and say, *You know what,*
I'm not real sure about this.
Maybe have that same mentor throughout the whole process,
Because, you know, Level 1 and Level 2,
You don't have anybody but your TDS.
So I kinda I think,
Maybe have a little bit more support from the very beginning.
That means you got your own support person from the beginning of the process,
And if you have any questions or anything, you can go into that person.

But now that I'm past all of that,
I'm like, *This was a really good decision.*
And I can just kinda see myself doing other things, you know,
Yeah, I can just see myself in the future, focusing more on training.

APPENDIX J

You See One, You Do One, You Teach One *Participant 10*

It's really, you know,
it's had a positive influence on my work,
and my life,
being a part of this cadre

Training...

It's about the democratization of resources and information.
I really don't want people to view me as an expert.
Like with [parent educators],
Just like when we're thinking about like how we relate to families.
Right?

A parent educator is not the expert.
Maybe they have more knowledge on something,
but they're not the expert in the room,
and I really feel like when it comes to training,
it's kind of the same way.
But it's...it's for everyone,
and it's for everyone to be able to do what they need with it.
And so, you know,
not holding anything back in terms of information or honesty
about what it's going to feel like to do the work from my perspective.
Just really the democratization of the information.

I had had a couple of different experiences
at different workplaces,
and I did not personally get support around how to do any kind of training
until my third job.
So in the first 2 it was very much like,
Alright,
you just need to go, like,
teach people how to do this thing that you know how to do,
and it would be in formal room setup settings,
like not like sitting down one on one with someone
where you're going over material.
But it would be, you know, like making a presentation
and helping them to figure things out
and ask questions and
what do they want to know?

And how are they going to use it?
 And it was really just, you know.
 toss me in the deep end and figure it out.
 And then in in the third role,
 which is where I am now,
 it was much more like,
 Okay, come on like, you're gonna come along
 and you're gonna learn this context.
 And you're gonna have support in learning the content.
 And you're going to see someone do this training
 or something similar.
 or with the same kind of group of people.
 And then we're gonna talk about
 why we did things the way we did things
 and why I picked this particular activity to do at this point in the training,
 and when we ask questions,
 and when we take breaks,
 and none of that support happened until, until I got to where I am now
 and then at that point it was much more collaborative, right?
 There's absolute freedom to take it and run with it.
 Once you've learned it, right?
 And to make some of those decisions around
 maybe completely changing the kind of discussion that happens,
 the way it's structured.
 This sequence of events.
 Like I could completely rework it,
 but I needed to understand why it was the way it was first,
 and why decisions were made
 and got the chance to talk to other trainers who were working in the same field
 about what it means to be a trainer
 and what it means to try to help people grow in their practice.

The first trainings I ever did, though,
 the absolute first ones it was,
 I had to develop the content and figure it all out,
 and how to do it,
 and how to teach it to other people.
 Which, looking back, I'm like, *How?*
How did I not think that that was a bad idea?
 Sometimes it's good to be naive, right?
 I mean we might say no to a whole lot more things.

I had met some other trainers,
 and I really liked what they had to say about the process.
 and being a part of the [this organization's] trainer cadre,
 and I was ready to step up and kind of take on that role.

This is a supportive process
that is going to help you to learn and observe and do with observation.

What I always come back to...

I watched way too much television as a child.

And I loved ER.

And they would always explain it on ER,
and I don't know if they do this on another medical show like this,
I've seen it on other medical shows.

But you know,

you see one,

you do one,

you teach one.

And there is this, this element of that that leaked into the process.

Right?

You're gonna observe [a training] for the purpose of taking it in,
knowing that this is something you're gonna be doing.

You are going to have the opportunity to work through

What are your questions?

How do you want to do this?

What is going to be your strong point off the bat?

You have the opportunity to work through those with someone
who's going to be really supportive,
and focused on developing you as a trainer.

And then you're going to be working with them in training settings
to then develop those skills and be ready to take the training wheels off.

Knowing that you have one person
who can be your point of contact when you have questions,
I think, is just so important.

So someone who you're not just talking to about you know,

How do you handle this conversation?

someone who you're not just asking those questions to,
but you can also talk to about the actual process,

*Like, Okay, we finished up this conversation, these questions and this reflection,
what am I doing next?*

Right?

Not having to go to 5 different people to get all your questions answered
is I just think, I think in a way, it's empowering because you know what to do.

You don't necessarily know what to do in the moment.

But you know how to find out.

You're not getting lost.

You're not, you know, going in 5 different directions to try and figure it out
like, *Okay, I'm a part of this process.*

I think you feel more part of the process
when you've got that one person that you can trust with it.

When you observe training as part of your certification,
 you are thinking about this not just as,
 oh, let me think about this training,
 but you're thinking about it from the perspective of a trainer.
 That's a completely different,
 completely different than like just attending and learning, right?

So, in general, a lot of self-directed learning.
 I am a fairly visual learner, and so for me, really,
 with like learning the script,
 I would literally hold the pages in my hand,
 and kind of pace around my apartment at the time,
 reading it out loud and kind of like practicing, thinking
What are questions that people might ask?
 And practicing and answering like all just, you know, by myself.
 Just the walls kind of hearing me have these conversations with big participants.
 But so there's this visual element,
 but also needing to speak out loud and working through that largely, individually,
 and then taking it to working with my TDS person and be like,
Hey...well, like, here's kind of what I'm imagining,
and here's where I'm at with it.
 So lot of very self-directed and quite a bit visual.

There were times where I would look at it [the competencies],
 and feel really confident,
 and times where I would look at it,
 and be discussing it,
 and feel like I am never gonna get there.
 That's not to say that I don't value it.
 I think it's a really good rubric and blueprint,
 but it's not something that gives me kind of a consistent level of of guidance.
 It's something that I either need to have control over when we're talking about it,
 sort of in the right head space,
 or it needs to be something where I'm given the space to think about it,
 and not have to like, put a number down on paper.

The reflection was huge, that was really huge,
 being able to be validated in what went well,
 and have the opportunity to say, *This is what I feel happened.*
This is what I saw when I was
standing up there being the one who was presenting and training this,
 and kind of get that feedback right in that moment,
 So that you know, in the same day you're doing it,

and then you're having the conversation and then, you know, the really big conversations kind of at the end of the training and in between the training sessions. after you've gotten a little more distance to really kind of process internally.

That was a huge, a huge thing for me in being able to feel ready and feel like I was getting to a place where I could own this.

Having gone through that process and being part of this group of people has absolutely made me more open to that whole idea of, you know, assuming the best intentions. And finding ways to set people up to be able to act on those best intentions. The mentoring process was definitely important in getting me there, but seeing it lived in practice, I think, was really necessary as well. And yeah, I would think I would say that was really the biggest and that has really permeated through throughout my work and my life in a lot of different ways.

APPENDIX K

Informed Consent Form***Trainers' Experiences in a Professional Development Certification Program***

Consent to take part in research

I [insert name] voluntarily agree to participate in this research study.

I understand that even if I agree to participate now, I can withdraw at any time or refuse to answer any question without any consequences of any kind.

I understand that I can withdraw permission to use data from my interview within two weeks after the interview, in which case the material will be deleted.

I have had the purpose and nature of the study explained to me in writing and I have had the opportunity to ask questions about the study.

I understand that participation involves participating in a one-hour interview with questions about my experiences in the trainers' certification process. I understand I may be invited to participate in a follow-up interview individually or with another trainer.

I understand that I will not benefit directly from participating in this research.

I agree to my interview being audio-recorded.

I understand that all information I provide for this study will be confidential.

I understand that in any report on the results of this research, my identity will remain anonymous. This will be done by changing my name and disguising any details of my interview which may reveal my identity or the identity of the people I speak about.

I understand that disguised extracts from my interview may be quoted in a dissertation, journal article, or organizational report.

I understand that if I inform the researcher that myself or someone else is at risk of harm, they may have to report this to the relevant authorities - they will discuss this with me first but may be required to report with or without my permission.

I understand that signed consent forms and original audio recordings will be retained in a digital file with three levels of password protection accessible only by the researcher for up to five years.

I understand that a transcript of my interview in which all identifying information has been removed will be retained for up to five years.

I understand that I am entitled to access the information I have provided at any time while it is in storage, as specified above.

I understand that I am free to contact any of the people involved in the research to seek further clarification and information.

Laura Bierema, Principal Researcher

University of Georgia

Bierema@uga.edu

Sara Jane Blackman, Researcher

University of Georgia

blackman@uga.edu

Signature of participant

Date

I believe the participant is giving informed consent to participate in this study.

Signature of researcher

Date

APPENDIX L

Recruitment Messaging**Initial email:**

Dear [Participant's Name],

I hope this email finds you well. My name is Sara Jane Blackman. I am a student at the University of Georgia and I am currently conducting research on trainers' certification experiences. I am inviting you to participate in a one-hour interview, as your perspective and insights would greatly contribute to the study.

The purpose of this research is to understand how you experienced the Parents as Teachers trainer certification process to learn what activities trainers consider influential for learning and perspective transformation.

Your participation will provide valuable insights that can enhance our understanding of trainer development and contribute to the body of transformative learning. Your input will remain strictly confidential, and any identifying information will be anonymized to ensure your privacy.

The interview process will involve approximately one hour of your time. I can conduct the interview over the phone or via video call, based on your convenience and preference. I am flexible in scheduling the interview, and we can arrange a time that suits you best.

In appreciation of your participation, I would be happy to provide you with a summary of the research findings once the study is completed. Your contribution will make a significant impact on the success of this research endeavor.

Participation in this study is entirely voluntary, and you have the right to withdraw at any time without any consequences. Additionally, all data collected will be handled with the utmost confidentiality and will only be used for research purposes. If you have concerns at any time during the research and would like to speak to someone outside of the study, you may contact Donna O'Brien at donna.obrien@parentsasteachers.org.

If you are interested in participating or have any questions regarding the research, please feel free to contact me at blackman@uga.edu or 706-202-3273. I would be delighted to provide you with further information and address any concerns you may have.

Thank you for considering this invitation. I look forward to the possibility of collaborating with you and hearing your valuable insights.

Best regards,
Sara Jane Blackman
Doctoral Candidate, University of Georgia

Follow-Up Email:

Dear [Participant's Name],

I hope this email finds you well. This message is a follow-up email to my initial invitation for you to participate in a research study about trainers' experiences.

The purpose of this research is to understand how you experienced the Parents as Teachers trainer certification process to learn what activities trainers consider influential for learning and perspective transformation.

Your participation will provide valuable insights that can enhance our understanding of trainer development and contribute to the body of transformative learning. Your input will remain strictly confidential, and any identifying information will be anonymized to ensure your privacy.

The interview process will involve approximately one hour of your time. I can conduct the interview over the phone or via video call, based on your convenience and preference. I am flexible in scheduling the interview, and we can arrange a time that suits you best.

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If you are interested in participating or have any questions regarding the research, please feel free to contact me at blackman@uga.edu or 706-202-3273. I would be delighted to provide you with further information and address any concerns you may have.

Thank you for considering this invitation. I look forward to the possibility of collaborating with you and hearing your valuable insights.

Best regards,
Sara Jane Blackman
Doctoral Candidate, University of Georgia

APPENDIX M



Institutional Review Board
UNIVERSITY OF GEORGIA

Date: Tuesday, June 13, 2023 4:31:15 PM

Print

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PROJECT00007560

Project Basics

Project Basics






- * Title of Study:
Trainers' Experiences in a Professional Development Certification Program
- * Principal Investigator:
[Laura Bierema](#)
- * Does the Principal Investigator have a financial interest related to this research? 
 Yes No
- The Principal Investigator will receive all communications related to this project. Select one or more persons to receive the same communications or to have read access to the project even if they are not study team members (e.g., a project coordinator):

Name	Organization
Sara Blackman	VPR-Center for Family Research
- * Are you requesting determination if your project meets the definition of human subjects research? 
 Yes No

PROJECT00007560

Request for Determination of Not Human Subject Research

Request for Determination of Not Human Subject Research

1. * Is the activity a systematic investigation? 
 Yes No
2. * Is the activity designed to develop or contribute to generalizable knowledge? 
 Yes No
3. Does the activity involve an individual as a recipient of any test article (i.e., drug, biologic, or medical device) or as a control? 
 Yes **No**
4. Does the activity involve an individual on whose specimen a medical device will be used (21 CFR 812.3(p)) (i.e., in vitro diagnostic [IVD] device)? 
 Yes **No**
5. Will you interact or intervene with a living person to collect information about, or biological samples from, the person OR Receive or obtain information about, or biological samples from, a living person (from any source or already in your possession)? 
 Yes **No**

Not Human Subject Research Activity Information

1. Describe the study objectives and rationale:

The purpose of this study is to use a Constructivist Grounded Theory methodology to understand how learning is experienced by trainers who have completed a professional development certification. The guiding research question asks: What are the learning experiences of trainers who have completed a professional development certification program?

Professional development (PD) systems are designed to increase skills and expand perspectives, but it is often unclear how this is experienced and which activities really matter. Professional learning content developers face many challenges in choosing meaningful learning formats, activities, and resources. One of the most significant challenges is finding time for employees to attend training sessions, workshops, or other development programs. Employees often have demanding schedules and responsibilities that can make it difficult to take time away from their work. The cost of PD programs can also be a barrier, particularly for smaller organizations. These costs can include fees for training, materials, and travel expenses, which can make it challenging to provide equal opportunities for all employees. This can lead to subject matter experts (SMEs) being tasked with creating learning activities. While SMEs can have deep knowledge and experience, they often lack critical instructional design or adult learning skills. Participation in professional development programs is voluntary, and some employees may not see the value in attending, especially if the content is unengaging. It can be a challenge to motivate employees to participate fully in the training. Another dimension is learners' potential resistance to changes that result from PD programs. If the changes require them to learn new technologies or processes or take on additional responsibilities, they may feel overwhelmed or resistant to change.

Thus, this study will identify the experiences trainers in a certification program identify as most meaningful in professional learning and growth.

2. Provide a brief description of the study procedures.

This study will use a constructivist grounded theory methodology. A survey will be sent to potential participants to gather basic demographic information and determine whether eligibility and willingness to participate. Data will be collected through document analysis and interviews in this study. Surveys will be used to (1) determine interest in research participation, (2) trainer demographics, and (3) previous educational and work experience. The voluntary survey will explain the nature of the research to be conducted and collect the following information: trainer name, years of training experience prior to entering the certification process, year trainer achieved certification, basic demographics, educational background, previous work experience; level of willingness to participate in the study (i.e., willing to participate in the study, willing to participate in an initial one-hour interview, willingness to participate in a follow-up interview, and/or willingness to participate in a paired interview or focus group).

Documentation Analysis: Formal data collection efforts will begin with a thematic document analysis of three sets of documents developed to support individual trainer change: (1) trainer competencies, (2) trainer certification reflections, and (3) annual trainer growth plans. Trainer competencies refer to the knowledge, skills, abilities, and behaviors required for trainers to perform successfully. Trainer certification reflection forms are completed during the certification process to identify strengths and challenges related to competencies. Trainers use annual growth plans to document continued learning and development goals. The analysis will identify convergent and divergent themes.

A series of individual, joint, and group interviews will be conducted with trainers to explore their personal perspectives on the certification process. A flexible interview guide will support the researcher's focused inquiry while allowing responsiveness to new or intriguing ideas that arise. The study will begin with ten individual interviews to establish an initial data set. Joint and group interviews will be then used to contextualize and co-produce data. Interview questions are based on the study's research questions. Experts in the fields of adult learning, transformation, professional development, and coaching will be asked to review the interview guides and provide suggestions. Interviews will be conducted in-person or online using video conferencing software. Each interview will be recorded and transcribed. Interviewees will be allowed to review transcripts and correct content.

Data analysis will begin with initial coding, where the researcher breaks down the data into fragments and assigns labels to describe the content and identify emerging patterns and relationships within the data. Memo-writing will be used to capture the researcher's thoughts, ideas, and insights about the data. The researcher will compare data, codes, categories, and memos to identify similarities and differences, refining and elaborating on emerging concepts and relationships. This iterative process is essential for generating grounded theory. As the study progresses, the researcher will purposefully select new participants or data sources based on emerging concepts and gaps in the data. Data collection and analysis will continue until theoretical saturation is reached, meaning that no new concepts or relationships emerge from the data and the emerging theory is well-developed.

3. Describe the subject population, and the type of data/specimens to be studied:

Participants will include a representative sampling of up to thirty individuals who have completed a trainer certification process and are still members of the associated trainer professional development system. Although theoretical saturation may occur with fewer participants, empirical literature recommends planning for thirty participants or interviews to fully explore the phenomena's data. Participants will be identified through critical case sampling, a technique used to deliberately select participants who will provide the most relevant data for the research question. Critical case sampling selects individuals who provide unique examples to help the researcher identify key factors or variables central to the phenomenon under study. The cases selected can be typical or atypical in relation to the phenomenon being studied and provide rich data that gives deep insights into the phenomenon being studied. Critical case sampling assists in identifying key factors that are relevant to the broader population or context being studied. The possible participant pool includes approximately 70 individuals. There are only two males in the training cadre. Participant selection criteria are (1) successful completion of the trainer certification process at least one year prior to the study and (2) no longer than ten years ago and current membership in the TPDS. Because my research interests are not tied to any preset trainer characteristic (e.g., gender, age, background), I plan to start data collection with five randomly selected trainers from the eligible population. A short interest survey will be sent to all trainers who meet the selection criteria. The survey will collect basic demographic information and willingness to participate in the study. Trainers who agree to participate in at least an initial interview will be randomized.

4. Identify the source of data/specimens (i.e., from whom/where these will be obtained):
Participants will be selected from a cadre of 70 trainers who have completed a trainer certification program facilitated by a national non-profit organization headquartered in St. Louis, MO.
5. Describe how data/specimens were collected:
No data has been collected yet.
Data will be collected through document analysis and individual, joint, and group interviews. Each interview will be recorded and transcribed.
6. Were the data/specimens originally collected solely for research purposes?
 Yes No

7. Attachments:

Document	Category	Date Modified	Content URL
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There are no items to display

PROJECT00007560

Project Funding

Project Funding

1. * Is the work described in this protocol, or the work described in the overarching project, funded by an external source:

Yes No

2. Compare the scope of the Human Subjects Activities included in the overall project to the activities described in this protocol submission:

They are the SAME:

All human subjects activities in the overall project are included in this protocol submission:

Yes No

They are DIFFERENT:

Human subjects activities included in the overall project but not part of this protocol submission have already been included in a separate pending or approved protocol submission:

Yes No

Human Subjects Activities included in the overall project but not in this IRB Submission are intended to be included in a future UGA IRB Submission:

Yes No

Human Subjects Activities included in the overall project but not in this IRB Submission have already been included in a separate pending or approved IRB Submission to an external institution/entity:

Yes No

Human Subjects Activities included in the overall project but not in this IRB Submission are intended to be included in a future IRB Submission to an external institution/entity:

Yes No


PROJECT00007560

Study Team Members

Study Team Members

1. Identify each UGA faculty, staff, or student who will be engaged in the conduct of human research. Do not select the PI again

	Name	Roles	Financial Interest	Involved in Consent	E-mail	Phone	Is Student Project
View	Sara Blackman	CO- INVESTIGATOR DATA ANALYST RESEARCH COORDINATOR	no	yes	blackman@uga.edu	706-425-2991	true

2. Identify non-UGA collaborators* who will be engaged in the conduct of human research. 

Name	Email	Organization	Training Document	Investigator Agreement
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There are no items to display

**Submit an Individual Investigator Agreement for all study personnel with an institution that does not have an assurance with the Office for Human Research Protections or OHRP (typically, local schools, private doctors, clinics).*

**For study personnel who are affiliated with an institution that has an assurance (has its own IRB), do not submit an Individual Investigator Agreement. Instead indicate that you have an External Site on the Study Scope page.*

**If the submission is for reliance on an External IRB, do not list study team personnel at non-UGA sites.*

PROJECT00007560

Supporting Documents

Supporting Documents

Documents:

Document	Category	Date Modified	Content URL
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There are no items to display

APPENDIX N



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 310 E. Campus Rd.
 Athens, Georgia 30602
 TEL 706-542-3199 | FAX 706-542-5638
 IRB@uga.edu
<http://research.uga.edu/hso/irb/>

Human Research Protection Program

EXEMPT DETERMINATION

August 14, 2023

Dear [Laura Bierema](#):

On 8/14/2023, the Human Subjects Office reviewed the following submission:

Title of Study:	Trainers' Experiences in a Professional Development Certification Program
Investigator:	Laura Bierema
Co-Investigator:	Sara Blackman
IRB ID:	PROJECT00007877
Funding:	None
Review Category:	Exempt 2ii

We have determined that the proposed research is Exempt. The research activities may begin 8/14/2023.

Since this study was determined to be exempt, please be aware that not all future modifications will require review by the IRB. For more information please see Appendix C of the Exempt Research Policy (<https://research.uga.edu/docs/policies/compliance/hso/IRB-Exempt-Review.pdf>). As noted in Section C.2., you can simply notify us of modifications that will not require review via the "Add Public Comment" activity.

The PI is responsible for ensuring that all activities and materials are compliant with the following policies: [Participant Selection and Recruitment](#), [Internet Research](#), [Use of External Sites in Research](#). Also, the consent process must include the elements in Appendix B of the [Exempt Research](#) policy.

A progress report will be requested prior to 8/14/2028. Before or within 30 days of the progress report due date, please submit a progress report or study closure request. Submit a progress report by navigating to the active study and selecting Progress Report. The study

may be closed by selecting Create Version and choosing Close Study as the submission purpose.

In conducting this study, you are required to follow the requirements listed in the Investigator Manual (HRP-103).

Sincerely,

Jennifer Queen, Quality Assurance Officer
Human Subjects Office, University of Georgia

GLOSSARY

Andragogy (Adult Learning Principles): fundamental concepts and theories that guide the design and delivery of effective education and training for adult learners (Knowles, 1970, 1975, 1980, 1984).

Behavioral Coaching: a coaching approach that concentrates on modifying behaviors to achieve specific goals (Dembkowski & Eldridge, 2012; Eldridge & Dembkowski, 2013).

Bracketing: a technique where researchers journal their known biases to recognize the differences between their knowledge and that of participants. It helps in acknowledging and addressing biases that may influence the research (Williams & Morrow, 2009).

Cascading Coaching: an approach that involves the systematic transfer of knowledge, skills, and abilities from one level of an organization to another, often starting with senior leadership (Hosmer, 2006).

Classic Grounded Theory (GT): a research methodology and approach that involves generating theories inductively from data, rather than testing existing hypotheses deductively; associated with Glaser's work, emphasizing the development of integrated conceptual hypotheses from inductive data analysis (Chun Tie et al., 2019; Evans, 2013; O'Connor et al., 2018; Sebastian, 2019).

Coach: a developmental role involving a structured and supportive interaction aimed at enhancing an individual's skills, knowledge, and performance (Bierema, 1999).

Co-construction of Theory: the primary purpose of Constructivist GT is the collaborative development of theory by both the researcher and participants (Charmaz, 2014).

Coding Process: analysis begins with coding, which involves identifying processes and actions, often represented by gerunds (verbs ending in -ing), to answer the question, “What is happening?” (Gibbs, 2015).

Cognitive Coaching: a coaching approach that focuses on helping individuals recognize and change unproductive thought patterns and beliefs (Williams et al., 2010).

Constant Comparison: data is compared and analyzed continuously to develop categories and concepts (Charmaz, 2014).

Constructivist Grounded Theory (GT): a research approach that seeks to develop theories or explanations about a phenomenon by systematically analyzing qualitative data. It emphasizes the construction of meaning from the data rather than testing existing hypotheses (Charmaz, 2014).

Critical Case Sampling: a purposeful sampling technique in qualitative research that selects participants who provide unique examples relevant to the research question (Charmaz, 2014).

Construction of Theory: Grounded theory constructs theory as categories emerge from the data through coding, memoing, and constant comparison. It involves abductive analysis and reasoning and continues until all interpretation fits all the data (Charmaz, 2014).

Data Analysis: systematic examination and interpretation of collected data to identify patterns, themes, and insights that can inform the research objectives (Carranza, 2023).

Deductive Testing: a research approach that involves testing pre-existing categories and theoretical frameworks to refine, confirm, or reject them (Strauss & Corbin, 1994).

Developmental Relationships: interactions and connections between individuals that foster personal and professional growth, often characterized by mentorship and coaching (Rock & Garavan, 2006).

Disorienting Dilemma: a crisis that challenges an individual's assumptions and beliefs (Mezirow, 1985, 1991, 2000).

Focused Coding: involves sorting and organizing codes into the most substantial and frequent categories (Charmaz, 2014).

Foundational and Model Certification Training: A model-specific training program that equips home visitation workers with the skills and knowledge needed to use the parenting education model effectively.

Home Visitation Model: A framework used by organizations to provide support and services to families through relationship-centered conversations and active learning.

Inductive Logic: a form of reasoning that involves making generalizations based on specific observations or patterns observed in data (Charmaz, 2014).

Initial Coding: involves line-by-line coding to explore as many categories as possible (Charmaz, 2014).

Interpretive Grounded Theory: Grounded Theory associated with proponents like Strauss, Corbin, and Clarke, which uses an interpretive approach to develop theory grounded in systematically gathered and analyzed data (Strauss & Corbin, 1994).

Iterative Data Collection and Analysis: data is collected and analyzed iteratively and simultaneously throughout the research process (Charmaz, 2014).

Learning Management System (LMS): web-based technology used for learning and instruction.

Learner Motivations: factors that drive individuals to engage in learning activities, persist in the face of challenges, and work towards their educational goals, which can be intrinsic or extrinsic (Knowles, 1980).

Level 1: the first phase of the trainer certification process studied in this research.

Level 2: the second phase of the trainer certification process studied in this research.

Memo Writing: memo writing is a vital part of the grounded theory analytic process, serving as reflective interpretive pieces that document ideas, events, and thought processes (Charmaz, 2014).

Mentor (capitalized to indicate formal title): when written with a capital “M,” the author is referring to the specific role of an assigned mentor in the trainer certification process studied.

Mentoring Phase: in the context of this study, refers to the year post-certification where new trainers are assigned and regularly meet with a Mentor.

More Knowledgeable Others (MKO): a person who is considered to have more knowledge, skills, or competence in a particular area than the learner (Yarborough, 2018).

Parallel Process: the observation that similar patterns of behavior or emotional responses can be observed at different levels within a system, emphasizing the importance of reflective practice (Miller, 2004).

Peer Learning: peer relationships sustained and deepened development, enabling formal and informal knowledge transfer and application. Resource sharing and encouragement among peers nurtured self-efficacy and community.

Poetical Inquiry: a research method involving the creation of poems from interview transcripts based on participants’ words and phrases, used to explore and represent participants’ experiences and emotions (Brown et al., 2021).

Pragmatism: A philosophical perspective that emphasizes the practical consequences and applications of knowledge and values the effectiveness of theories in addressing real-world problems (Bandura & Walters, 1977).

Professional Development (PD): the process of acquiring new professional skills, knowledge, and experience for one's improvement (Klein et al., 2006).

Psychological Safety: feeling safe to ask question, speak up, and disagree without fear of negative consequences (Kegan, 2000).

Purposeful Sampling: a sampling technique in qualitative research where participants are deliberately selected based on specific criteria to provide relevant data for the research question (Charmaz, 2014).

Qualitative Research Methodology: a research approach that focuses on exploring and understanding complex phenomena through non-numerical data collection and analysis (Flick et al., 2004; Stake, 2010).

Reflective Practice: the process of critically examining one's methods, experiences, and beliefs to gain insights and improve effectiveness (Wang, 2012).

Reflexivity Statement: a statement or discussion by the researcher about their own perspectives, biases, and potential influences on the research process (Merriam & Tisdell, 2016).

Semi-Structured Interviews: interviews guided by open-ended questions that provide flexibility to explore emerging concepts and follow-up on participants' responses (Charmaz, 2014).

Subject Matter Expert (SME): an individual who possesses specialized knowledge, expertise, and experience in a particular subject or field (Bennett & Leduchowicz, 1983).

Symbolic Interactionism (SI): A sociological perspective that explores how symbols and language are used by individuals to make sense of social life and influence their actions (Barbalet, 2009).

Thematic Analysis: a qualitative data analysis technique that identifies and analyzes recurring themes or patterns within qualitative data (Anthony & van Nieuwerburgh, 2018).

Theoretical Sampling: a method that involves collecting, coding, and analyzing data while deciding what data to collect next and where to find it, allowing for the adaptation of data collection based on emerging insights and concepts (Charmaz, 2014).

Theoretical Saturation: the point at which data collection in qualitative research reaches a saturation level, meaning that no new findings or insights emerge from the data, indicating that enough participants have been included (Charmaz).

Trainer Agreement: a foundational document outlining expectations and commitments between trainers and the training organization.

Trainer Annual Growth Plan: a plan developed by the trainer that outlines goals, the goals' relationship to trainer competencies, how the goals will be measured, and the rationale.

Trainer Candidate: in the context of this study, an individual who enters the trainer certification process with the aspiration to become a certified trainer.

Trainer Competencies: set clear standards and provide a roadmap for trainers' skills and growth. They refer to the knowledge, attitudes, skills, and behaviors expected of trainers.

Trainer Development Specialist (TDS): in the context of this study, refers to developmental professionals in Level 1 and Level 2 who support trainer candidates in the certification process.

Trainer Professional Development System (TPDS): in the context of this study, a structured system within an organization designed to enhance the skills, knowledge, and competencies of trainers.

Trainer Recertification Plan: in the context of this study, a process trainers complete every five years to demonstrate significant proficiency in establish trainer competencies. During

recertification, trainers are paired with one Trainer Development Specialist who provides coaching and feedback based on the trainers' goals and performance.

Transformation and Growth: profound change or learning that occurred when trainers revisited and revised their role perceptions and assumptions which provided a sense of accomplishment and a commitment to lifelong learning.

Transformative Learning Theory: a theoretical framework that explores how individuals can experience profound changes in their perspectives, beliefs, and behavior through the process of critical reflection and self-discovery (Mezirow, 1985, 1991, 2000).

Zone of Proximal Development (ZPD): the space where optimal learning happens when learners are challenged just beyond their current knowledge and skill (Vygotsky, 1978a).