THE IMPACT OF OUR LANDING: AN ACTION RESEARCH STUDY ON PERSPECTIVE TRANSFORMATION

by

TAMMY ROSNER

(Under the Direction of Karen E. Watkins)

ABSTRACT

Study abroad programs over the last decade have been dominated by one demographic: white women. While the beneficial outcomes of study abroad participation are well documented, study abroad processes and practices have not been examined to determine how to expand the type of students who participate and, therefore, reap these benefits. This action research (AR) study explored how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. The project's goal was to introduce study abroad advisors to information regarding inclusive practices and then engage in discourse and reflection guided by transformative pedagogies. This study's interventions were based on transformative pedagogies and Mezirow's (1994, 1997, 2000) theory on perspective transformation.

While the goals of the study were individual in nature, the systemic context of the study lent itself to group and systematic changes. As such, all interventions were group-based, facilitating learning in concert with others. In this study, both the exposure to new ideas and the support of the participant groups with shared experiences facilitated more transformative outcomes both individually and collectively. The study's insights support the use of AR to

develop and enact workplace initiatives to deepen stakeholder buy-in and highlight the power of small efforts. Regarding perspective transformation theory (Mezirow, 1994, 1997, 2000), an alignment with AR methodology goals is substantiated, the idea that transformation can be realized in group-level learning is introduced, and the nurturing of transformation to reach full integration is discussed.

INDEX WORDS: perspective transformation, action research, study abroad, higher education, communities of practice, adult education, workplace learning

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by

TAMMY ROSNER

BA, University of Georgia, 1996

MEd, University of Georgia, 2003

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by

TAMMY ROSNER

Major Professor:	Karen E. Watkins
Committee:	Juanita Johnson-Bailey
	Laura Bierema

Electronic Version Approved:

Ron Walcott
Vice Provost for Graduate Education and Dean of the Graduate School
The University of Georgia
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DEDICATION

I dedicate this dissertation to my husband, Stephen Rosner, who helped me every step of the way by encouraging me, telling me how proud he was of me, and taking the lead in parenting for the past few years. To my son, Noah Rosner, who gave up lots of time with his mom to let me complete this goal. Being quiet during online class, playing quietly in the room while I wrote a paper or did reading just so we could spend some time together helped me stay motivated. Thank you both for giving me the support and the quiet time I needed to do this.

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CHAPTER 1

INTRODUCTION AND LITERATURE REVIEW

Introduction to the Focus of the Action Research Study and Its Relevance

The definition of study abroad has changed over time. According to The Forum on Education Abroad (2023), it is "a subtype of education abroad that results in progress toward an academic degree at a student's home institution." More generally, it can be understood as courses taken for credit outside of a student's home country that are applied toward a degree at the student's home institution. Education abroad includes all types of international education experiences, such as courses, experiential learning, internships, service learning, and other globally based learning activities (The Forum on Education Abroad, 2023). Expanding from the old mindset of the "junior year abroad" or the "European tour" taken by many at elite institutions, most U.S. institutions offer forms of curricular experiences or education abroad outside of one's home country, most of which continue to exist as study abroad. This study will focus only on study abroad and will not investigate the broader student mobility options included in education abroad.

The impact of study abroad on a student can be transformative in many ways. Not only can study abroad programs broaden perspectives and make students more competitive in the job market (Franklin, 2010), data presented in the last two decades has shown that studying abroad also affects student success outcomes in positive ways (Bell et al., 2020; Sutton & Rubin, 2010). In 2000, the University System of Georgia (USG) began the Georgia Learning Outcomes of Students Studying Abroad Research Initiative (GLOSSARI), which was eventually supported by

the Department of Education in 2006 (Sutton & Rubin, 2010). In Phase IV of the GLOSSARI study, it was found that, when controlling for self-selection of students who were more likely to study abroad, graduation rates for African American students who participated in a study abroad program were 13%–31% higher than those in the control group (Sutton & Rubin, 2010). Further, in 2019, the Consortium for Analysis of Student Success through International Education (CASSIE) released results validating the positive effects of study abroad on student graduation rates and GPA. CASSIE used exact and nearest-neighbor matching to match students who studied abroad with others with similar background characteristics. The research compared statistical twins through variables such as high school GPA, SAT/ACT score, Pell/need-based aid, race/ethnicity, and gender (Bell et al., 2020). CASSIE found that among underrepresented minorities such as Hispanic and African American students, the effects of study abroad on student success outcomes were shown to be even greater than in other populations (Bell et al., 2020).

In addition to the educational benefits highlighted by the GLOSSARI and CASSIE projects, most faculty and international educators also believe that study abroad has a profound effect on students' perception of themselves, of their own culture, and of other cultures. Studies have indicated that participating in a study abroad program helps most students develop skills that both employers and society value, such as flexibility, perseverance, and independence (Maharaja, 2018). These skills are also those needed for success in higher education, which could be the missing link that administrators have not yet discovered when searching for inventive paths to success for minority and first-generation college students.

Study abroad participation numbers for U.S. students have grown threefold over the past 20 years, from 114,000 in 1997/98 to 347,099 in 2018/19 (Martel et al., 2020, p. 14). As

participation numbers for study abroad programs grow, one would assume that numbers for diverse students participating would as well. While more diverse and underrepresented minorities are participating than ever before, their numbers remain woefully low in comparison to white students, as illustrated in Table 1.1. Moreover, in addition to the issue of lagging racial diversity, as indicated in Table 1.2, far fewer men than women study abroad, indicating a gender achievement gap as well (Martel et al., 2020).

Table 1.1

Percentage Rates of Study Abroad Students by Race/Ethnicity

Race/ethnicity	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
White	80.5	78.7	77.8	76.4	76.3	74.3	72.9	71.6	70.8	70.0	68.7
Hispanic or Latino	6.0	6.4	6.9	7.6	7.6	8.3	8.8	9.7	10.2	10.6	10.9
Asian, Native American or other Pacific Islander	7.3	7.9	7.9	7.7	7.3	7.7	8.1	8.4	8.2	8.4	8.9
Black or African American	4.2	4.7	4.8	5.3	5.3	5.6	5.6	5.9	6.1	6.1	6.4
Multiracial	1.6	1.9	2.1	2.5	3.0	3.6	4.1	3.9	4.3	4.4	4.7
American Indian or Alaska Native	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.5	0.4

Note. Adapted from *Open Doors 2020 report on international education exchange* (p. 73), by M. Martel et al., 2020, Institute of International Education.

Table 1.2

Percentage Rates of Study Abroad Students by Gender

Gender	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Women	64.2	63.5	64.4	64.8	65.3	65.3	66.6	66.5	67.3	67.0	67.3
Men	35.8	36.5	35.6	35.2	34.7	34.7	33.4	33.5	32.7	33.0	32.7

Note. Adapted from *Open Doors 2020 report on international education exchange* (p. 73), by M. Martel et al., 2020, Institute of International Education.

The university system in this study, referred to under the pseudonym University System of the South (USS) and described fully in Chapter 3, has experienced participation rates similar to those listed in Table 1.2, with some exceptions. Data for USS study abroad programs are only available from 2014/15 to 2018/19. The USS study abroad participation rates, provided in Table 1.3, are similar to the national rates shown in Table 1.1, in that African American students participate in study abroad at a much lower rate than white students. Although the African American participation numbers for the USS are higher than those presented nationally, there is still much work to be done in this area. Additionally, the USS participation data based on gender presented in Table 1.4 mirror the national data in Table 1.2.

Table 1.3

USS Percentage Rates of Study Abroad Students by Race/Ethnicity

Race/ethnicity	2014/15	2015/16	2016/17	2017/18	2018/19
White	52.0	52.6	58.9	56.0	56.1
Hispanic or Latino	4.8	6.4	5.3	7.3	8.3
Asian, Native American or other Pacific Islander	5.6	7.2	7.1	9.3	9.4
Black or African American	10.6	10.7	6.8	10.6	11.6
Multiracial	1.9	2.1	2.8	3.1	3.4
American Indian or Alaska Native	0.2	0.2	0.1	0.2	0.3
Do Not Know	24.6	20.3	18.7	13.3	10.6

Table 1.4

USS Percentage Rates of Study Abroad Students by Gender

Gender	2014/15	2015/16	2016/17	2017/18	2018/19
Women	63.4	65.9	66.3	66.3	66.5
Men	35.2	31.8	33.5	33.4	33.1
Do Not Know	1.1	2.1	0.1	0.2	0.4

This study, in conjunction with the USS's Black Men Enterprise (BME)[1], shares what has been learned about perspective transformation in higher education study abroad advisors with the aim of reducing barriers and cultivating inclusive study abroad programs. The BME program is unique to the USS and is acknowledged in USS promotional materials as the first statewide program to target its initiatives directly toward Black men's higher educational attainment. Prompted by an in-house benchmark study that uncovered the achievement gaps experienced by African American men within the USS, this program has grown from a pilot program in 2002 to its current iteration, known as BME 2.0. The BME creates targeted programs to increase graduation rates and degree completion through providing mentoring, skills enrichment, and other student support services along with leadership development. For the purposes of this study, the BME creates a unique opportunity to include the African American male student perspective since each of the 22 USS schools with a BME program has a director or manager tasked with overseeing the program. The partnership between the BME and study abroad advisors aimed to increase participation in study abroad within the BME and subsequently create growth and diverse capacity within the USS. By collaborating with and

[1] Pseudonym

including the BME in this study, I strove to create a democratic environment of change that directly involved the voices of those whom we are trying to assist throughout the study.

The relevance of my action research (AR) project and study is important to the field of learning, leadership, and organization development (LLOD) as well as the field of international education (IE). In LLOD, the transformative pedagogies used in staff development outside the classroom setting can assist in the development of transformative staff-based trainings. In the IE field, the low numbers of African American students participating in study abroad needs to be addressed. Focusing directly on study abroad advisor training and practices, rather than on the students themselves, provides a framework that can be used by other institutions.

The purpose of this AR study was to explore how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. Understanding the current perspectives of study abroad advisors who are not knowledgeable of or lack education in inclusive practices offers a greater understanding of how to initiate a perspective transformation regarding their role in affecting students' desire to participate in study abroad, particularly those students who remain underserved at present.

Situating the AR Study in the Literature

The barriers for African American male students to study abroad are varied. Little research exists in this area, and additional studies need to be conducted regarding the types of action that can be taken to dissolve barriers to studying abroad for the African American male population. In particular, research examining the systems, structures, and beliefs of higher education professionals influencing this population is crucial. Studies have demonstrated that known barriers range from the marketing of study abroad (Miller-Idriss et al., 2019) to student intent and purpose as well as social and cultural capital (Luo & Jamieson-Drake, 2015).

Furthermore, the field of IE needs to take a closer look at intentionality regarding program development, which is entirely within institutional control. Practitioners need to ensure that they are creating programs that appeal to all types of students, who may not desire to experience only white-centric Western European experiences.

An essential source of data for study abroad and the field of IE, in general, is the Institute of International Education (IIE)'s *Open Doors* report. The data contained in this report, which details student profiles including race and gender, is a foundational resource in the field of IE as well as for all nations and organizations interested and invested in global student mobility (Martel et al., 2019). Several studies, such as the GLOSSARI and CASSIE (Bell et al., 2020; Sutton & Rubin, 2010), have helped extend information about study abroad beyond history and data, connecting it to positive student success outcomes. Both the GLOSSARI and CASSIE studies, conducted by a large university system, have shown that student success outcomes for underrepresented minorities are higher for those who take part in study abroad (Bell et al., 2020; Sutton & Rubin, 2010). These studies create a pathway for African American male students to find academic success through a nontraditional route. The data contained in the *Open Doors* annual report, combined with the findings of the CASSIE and GLOSSARI projects, supports the assertion that although study abroad could assist African American male students in attaining their student success goals, very few are taking advantage of study abroad. The literature review presents a closer examination of the existing studies regarding African American student participation in study abroad and what is known about influencer roles in student perceptions of study abroad. A review of the literature around the power of influence is also included to assist in defining *influence* and contextualize how it is used in higher education.

Perspective transformation (Mezirow, 2000) is the end result experienced by adults through transformational learning, "which describes the distinctive learning some adults experience as they critically evaluate their values, beliefs, and assumptions in light of new information" (King, 2003, p. 14). To "facilitate transformative learning, educators must help learners become aware and critical of their own and others' assumptions" (Mezirow, 1997, p. 10). Adults "have a strong tendency to reject ideas that fail to fit our preconceptions, labeling those ideas as unworthy of consideration – aberrations, nonsense, irrelevant, weird, or mistaken" (Mezirow, 1997, p. 5). Through interventions, critical reflection, and guided action, study abroad advisors in this research were provided information regarding inclusive practices by and with an AR team.

Perkins (2020) stated that "although social capital-framed research indicates that individuals benefit from [an enabling network] with access to or who are part of hierarchical structures" (p. 157), such as school faculty and staff, African American students do not place a high value on the influence of these individuals. Social capital refers to one's "access to information through networks, support systems, and knowledgeable persons" (Perkins, 2020, p. 126) that help them discover and make good decisions (Salisbury et al., 2011). The question of whether African American students ascribe this low valuation due to their positionality or mistrust in university structures or whether the lack of information, knowledge, and social capital among the study abroad advisors with influence over many African American students causes such low valuation remains open. A possible bias exists among university faculty and staff, who may believe that African American students are not interested in studying abroad and therefore do not educate them about it (Salisbury et al., 2011). This study intends to explore how the

introduction of transformative pedagogies through staff development programs could change this perspective and lead to new, inclusive approaches to study abroad recruitment and advising.

Barriers to African American Participation in Study Abroad

While many studies of study abroad have addressed intention, implications, outcomes, and intercultural competence (Curtis & Ledgerwood, 2018; Fry & Murray Brux, 2010; Luo & Jamieson-Drake, 2015; Maharaja, 2018), few exist in the area of transforming study abroad advisors' influence over which students participate in study abroad programs. Even fewer studies have included the broad range of institution types that are included in this study. Many articles examining the study abroad experiences of African American students have confined their research to historically Black colleges and universities (HBCUs) or include a small sample of students who have already chosen to go abroad (Lee & Green, 2016; Perkins, 2020; Yeboah, 2019). Additionally, while some studies have examined the barriers to studying abroad for African American and other minority students, only Perkins's 2020 article considered the roles of influencers, such as study abroad advisors, as either barriers or enablers of study abroad participation.

In considering study abroad participation, African American students face additional barriers. While this study primarily aims to examine the role of influencers, these students' perceptions must first be understood. The benefits of study abroad acknowledged for all students include "academic attainment, intercultural development, career impact, and personal growth" (Geyer et al. 2017, p. 1043), which we must extrapolate as also applicable to African American students. Documenting and reporting these benefits further supports the need to reduce barriers to studying abroad for African American students. Additionally, while many white students seek to travel abroad and benefit from experiencing cultures different than their own, African

American students could benefit from gaining a global view separate from their unique existence in the United States (Maharaja, 2018), which may be fraught with racism and injustice and thus highly distinct from the experiences of white students.

In a recent survey studying students' motivations for studying abroad, most respondents were non-Hispanic white students (Curtis & Ledgerwood, 2018). The top two barriers to study abroad participation listed were cost and interference with academic goals (Curtis & Ledgerwood, 2018). While this study did not include any responses from nonwhite students due to a poor response rate, it did indicate that the top barriers to study abroad were similar for both white and minority students (Luo & Jamieson-Drake, 2015; Perkins, 2020; Yeboah, 2019). These issues must be dealt with in a more generalized way. Finding ways for institutions or organizations to offer greater financial support could help address these concerns. Additionally, further support to help pass the Senator Paul Simon Study Abroad Program Act, which was introduced in both the U.S. House and the Senate in 2019, is needed. Still waiting to be passed by the Senate, the bill will provide grants to assist postsecondary institutions in making study abroad a central component of higher education. Additionally, the bill looks to advance goals such as having study abroad participants better represent the demographics of enrolled populations and provide more access to nontraditional destination study (NAFSA: Association of International Educators, n.d.), which would greatly help improve minority participation levels.

Themes in the literature regarding barriers and influences for African American students included not just cost and interference with academic goals, discussed above, but also additional factors. For example, African American students can have difficulty imagining themselves traveling and even greater difficulty imagining themselves participating in study abroad because it is not an image that most see regularly. In their study, Miller-Idriss et al. (2019) took an in-

depth look at the marketing of study abroad programs from several angles, including university branding, elite student perceptions, and how the meaning of study abroad is conveyed through images. Among the 2,000 study abroad marketing images reviewed, the most typical pictures displayed mostly white students jumping, standing with arms outstretched, and horizon gazing. According to the authors, these types of images convey the idea held by elite U.S. institutions of what both higher education and study abroad should mean for students. The analysis questioned what such visual representations mean for underrepresented minorities and whether such marketing materials are partially responsible for the low participation numbers from this population. The collection time for the images studied was in 2013, which coincided with the uptick in the use of Facebook, Instagram, and other image-heavy social media outlets (Duggan et al., 2015). Use of these outlets for study abroad marketing has become the norm, conveying study abroad expectations and perceptions of what students should feel and do while abroad through just one or a few images. Since so few images of African Americans studying abroad exist, many African American students may still feel left out even though schools are doing a better job of diversifying their imagery overall.

Furthermore, African American students may worry that they will experience discrimination abroad similar to what they may have encountered in the United States, as compounded by the lack of visual representation, or may fear even worse treatment if they are wholly unfamiliar with a particular destination's culture. Yeboah (2019) reported that on many programs, African American students worry about being the only "Black person abroad among a group of white participants" (p. 15), which increases these students' fear of discrimination and lowers participation. One group of surveyed African American students stated that if they studied abroad, they worried that they would be different from both the culture of the country they were

visiting and the group of students with whom they would be traveling, alluding to a fear of discrimination from a mostly white country and study abroad group (Fry & Murray Brux, 2010). These fears are valid, as of the top 25 study abroad destinations, only one—South Africa—is located on the African continent (Martel et al., 2020).

Luo and Jamieson-Drake (2015) noted that using study abroad to promote racial understanding has the opposite effect on minority students who have experienced racial discrimination at home; most opt "not to study abroad due to fear of encountering more discrimination in a foreign country" (p. 50). Moreover, Salisbury et al. (2009) concluded that minority students are unlikely to seek out study abroad programs advertised as promoting racial understanding or cross-cultural differences, as African American students already deal with such issues every day in the United States. The idea of traveling to experience different cultures points to the inherent whiteness of study abroad expectations, which may only bring up painful thoughts of discrimination for African American students.

Many studies addressing the lack of social and cultural capital (Luo & Jamieson-Drake, 2015; Perkins, 2020) experienced by African American students have referred to the discussion by Salisbury et al. (2011), who defined social capital as the ability to acquire knowledge and information through people and social systems that can assist one in making more informed decisions that lead to success. Cultural capital, in contrast, refers to the advantages one receives from one's family and station in life (Salisbury et al., 2011) and is tied to generational knowledge. The knowledge we inherit from our family can often determine our decisions and how successful we become. Many studies have attributed the low numbers of African American student participation in study abroad to their actual or perceived lack of cultural and social capital. The social and cultural capital of minorities is perpetually viewed through the white

student lens, resulting in a perception of lack. Most students who study abroad are white. These same students possess what is perceived as high levels of social and cultural capital because most research regarding study abroad influence is based on what is possessed and valued by white students (Perkins, 2020).

Just as important to understand and study as the barriers to study abroad for African American students are the influences that help students decide to study abroad. Although much less discussed in the literature, influence lies at the heart of this study. By better understanding such influences, university staff and faculty can engage these positive influences to create better opportunities for African American students. Some of the studies dealing only with African American students and not broadened to deal with all minority study abroad participation have included heritage travel, which is focused on traveling to one's ancestral homeland to better connect with one's heritage. This type of study abroad is not included in this study.

This study proposes that students can travel to any country and reap the student success outcomes offered by the CASSIE study (Bell et al., 2020). Heritage study abroad programs are created with genuine intentions but may not serve larger groups interested in travel. Creating intimate programs is not cost-effective and greatly increases the cost of travel for both students and institutions, thereby amplifying the financial issues that plague all students who consider studying abroad. Studies have shown that if finances allow, heritage travel trips are attractive to African American students (Lee & Green, 2016; Yeboah, 2019) but can also be off-putting if students have preconceived notions of discrimination or struggles with cultural acceptance as representing America. In Yeboah's (2019) study, it was concluded that heritage study abroad offerings could assist in building study abroad capacity at predominantly white institutions, but only if open only to African American students. Such an approach is not realistic for

predominantly white institutions due to costs. Moreover, this framework seems to create a new barrier to many of the goals of campus-wide participation in study abroad and the valued outcomes of diverse viewpoints on these transformative programs.

Using Yosso's (2005) community cultural wealth model, Perkins (2020) inverted the idea of the lack of cultural and social capital as a barrier to studying abroad to recognize what she referred to as the enabling networks held by African American students that serve as a positive influence on participation. University faculty and staff form a part of these enabling networks. Nevertheless, in her study, only 11% of students responded that they were influenced by university faculty and staff, demonstrating that "although social capital-framed research indicates that individuals benefit from [an enabling network] with access to or who are part of hierarchical structures" (p. 157), African American students do not value the influence of these figures highly. In contrast, family and friends were rated much higher, at 55% and 33%, respectively. Is this low value due to positionality or mistrust in university structures, or do the university staff with influence over many African American students lack information, knowledge, and social and cultural capital themselves?

Finally, in studying predictors of study abroad intent, Luo and Jamieson-Drake (2015) broadly examined on-campus activities in which students participate as predictors of study abroad participation. Their findings showed that most students, including minorities, who took part in social groups such as fraternities and sororities were more likely to study abroad. While this result may have connections to the social and cultural capital ideas introduced earlier in this chapter, it also highlights an additional pathway to participation that is affected by university faculty and staff influence and thus should be studied.

Table 1.5

Barriers and Influences Related to African American Participation in Study Abroad

Author	Barriers			Influences		
Luo & Jamieson-Drake (2015)	Financial	Fear of discrimination	Lack of social/ cultural capital		Participation in social groups	
Yeboah (2019)	Financial	Fear of discrimination		Heritage travel		
Perkins (2020)	Financial	Fear of discrimination	Lack of social/ cultural capital			Enabling networks (family, friends, university faculty/staff)
Salisbury et al. (2011)		Fear of discrimination	Lack of social/ cultural capital			
Lee & Green (2016)				Heritage travel		Program intentionality

Table 1.5 provides an overview of some barriers to and influences on African American student participation in study abroad identified in the existing literature. Notably, many more barriers have been identified than influences. Additional studies are required to make sense of the influences that assist African American students in deciding to study abroad, and "such knowledge is urgently needed to ensure equitable and universal access to an educational experience that higher education organizations, public policy makers, and employers uniformly agree is critical for individual, social, and national prosperity in the 21st century" (Salisbury et al., 2011, p. 125).

Role of Influencers

In his work "On the Concept of Influence" (1963), Talcott Parsons posited that "influence is a way of having an effect on the attitudes and opinions of others through intentional (though not necessarily rational) action—the effect may or may not be to change the opinion or to prevent a possible change" (p. 38). Alternatively, Zaaiman (2020) suggested that "influence has a more indirect working" by making "certain choices more probable" (p. 4). In either definition, one could view influence as affective rather than overtly effective. This study investigates the role of study abroad advisors and inclusive practices, as well as the lack of knowledge regarding these practices, affect students' decisions to study abroad. Furthermore, interventions aimed at study abroad advisors will address perspective transformation regarding how the USS approaches the problem of low study abroad participation by African American male students. We can view the influence of those in higher education who advise and interact with students as a "means of persuasion" (Parsons, 1963, p. 48) that an influencer might exert upon a student "because it is felt to be a good thing" for him or her (Parsons, 1963, p. 48). Parsons (1963) inferred that persuasion and influence possibly occur due to trust, and a student should rightly believe that higher education faculty and staff—and even outside mentors—have "inherently trustworthy intentions" (p. 49). Yet what if influencers do not realize that they are unknowingly serving as a barrier? If study abroad advisors have a poor or incomplete conception of inclusive study abroad practices, they may serve as a barrier and enforce misconceptions within underserved populations such as African American males. According to Zaaiman (2020), "with influence, agents do not require a special purpose or intention" (p. 5); influence is free and therefore may be shared without thought to ramifications.

Moreover, Parsons (1963) explained that when influencers make generalized statements about a certain topic—in this case, study abroad—the audience expects them to provide justification for these statements. According to Parsons (1963), however, "the function of justification is not actually to verify the [statements], but to provide the basis for the communicator's *right* to state them, without…needing to verify them" (p. 50). Thus, a study abroad advisor who has a poor conception of inclusive study abroad practices and believes that it might not be advantageous for a student based on unvalidated concerns may perpetuate those misconceptions without examining whether they are accurate. Accordingly, such justification (rather than verification) could be seen as serving as a barrier to students' study abroad decision making. The helpful conceptualization of influence by Zaaiman (2020) is provided in Table 1.6.

Table 1.6

Aspects of Influence Conceptualized

Primary meaning	Operation	Process	Outcome
Affects/interferes/impinges	Works indirectly, unseen or insensible through indirect means, persuasion, veneration, or deference	Makes certain outcomes/choices more probable to choose within the set of choice alternatives available to them	Causes change in behavior, beliefs, knowledge, opinions, values, and norms

Note. From J. Zaaiman, "Power and influence: assessing the conceptual relationship," *Koers*, *85*(1), p. 11.

Finally, as demonstrated, influence can be subtle and unintentional but still affect and/or interfere with decision making. In the case of higher education, study abroad advisors and their roles in serving as either a barrier or an enabler could be tested when perceptions are critically examined.

Literature Review Methodology

This literature review examined studies related to perspective transformation. This purposeful sample of studies allowed for deeper understanding of assumptions, critiques, and the use of perspective transformation to illuminate how to effect change in large organizations. The search words/terms used were "perspective transformation," "transformative learning theory," "higher education," "study abroad," "empirical studies," "higher education," and "public administration." For the literature search, a number of education, psychology and other databases were used, including Educational Resources Information Center (ERIC), Education Research Complete, ProQuest, and Google Scholar. In addition, citation snowballing was used to find additional relevant studies.

Several articles were selected based on the aforementioned search process. More than 3,000 articles were identified using the keyword search, of which studies not associated with education, institutions of higher education, or large organizations, as well as those solely examining student experiences or scientific in nature, were excluded. Each of the remaining studies were evaluated for their use of perspective transformation.

Perspective Transformation

As stated, the guiding theory in this study is transformative learning theory, but more specifically, the study is based on Mezirow's (1994, 1997) theory of perspective transformation. Mezirow (1994) explained transformation theory as "a comprehensive, idealized, and universal model consisting of the generic structures, elements and processes of adult learning" (p. 222). Transformational learning is dependent upon a change in one's critical self-reflection of assumptions. Taylor (1998) explained that critical self-reflection of assumptions is what "is most essential for the transforming of our meaning structures" (p. 9), which results in perspective

transformation. Moreover, Mezirow (1997) asserted that adults become more self-directive as transformative learning evolves, a view supported by Cranton (2016), who saw transformative learning and self-directed learning as "interwoven" (p. 6). Merriam and Baumgartner (2020) also related Mezirow's theory of transformation to self-directed learning, arguing that the "key to self-directedness" (p. 142) for Mezirow was about critical awareness of one's own learning.

The start of transformative learning comes from a disorienting dilemma, which could be "as traumatic as losing a job or as ordinary as an unexpected question" (Cranton, 2002, p. 64). Mezirow (2000) provided 10 phases of meaning through which a person moves as they work toward perspective transformation. These phases are initiated by a person experiencing a disorienting dilemma that ultimately leads to the "reintegration into one's life on the basis of conditions dictated by one's new perspective" (Mezirow, 2000, p. 22). Grounded in this theory, an AR team created interventions based in transformative pedagogy to guide study abroad advisors through critical examination of their current practices in order to evaluate what transformative outcomes were achieved.

Early Influences on Mezirow's Theory of Perspective Transformation

Thomas Kuhn's Paradigms

One early influence of Mezirow's theory of perspective transformation was Thomas Kuhn's work on paradigms (Kitchenham, 2008). Kuhn's 1962 work *The Structure of Scientific Revolutions*, a history of science, highlighted the role of paradigms. In his work, Kuhn argued that in scientific work, anomalies are often discovered; if they continue, they can develop into a crisis. In a crisis, the current paradigm or ideas and theories accepted by the scientific community (Anand et al., 2020) are questioned, and the scientist must transition to a new paradigm (Preston, 2008). Kitchenham (2008) has argued that Kuhn's "conception of paradigms

provided a basis for Mezirow's notion of transformative learning" (p. 106). Although Mezirow's theory of perspective transformation initially referred to "meaning structures" (Mezirow, 1994) and then "frames of reference" (Kitchenham, 2008), rather than paradigms, there are certainly similarities between Kuhn's crisis and Mezirow's disorienting dilemma, which the latter believed was the ignition of transformation (Mezirow, 1994). Kitchenham (2008) applied Khun's concept of paradigms in describing Mezirow's theory of transformative learning, calling the theory itself a paradigm, "as it has explained many of the unanswered questions about adult learning and created its own group of specialized practitioners" (p. 107).

Malcolm Knowles' Andragogy

In the 1960s, Malcolm Knowles introduced a new term to distinguish adult learning from child learning (Merriam & Baumgartner, 2020). As a contrast to pedagogy, Knowles used the term andragogy, about which he put forth several assumptions, one of which involved internal rather than external motivation (Merriam & Baumgartner, 2020). Mezirow's early work echoed similar ideas to Knowles's views on self-directed learning, although Mezirow adapted these ideas by "describing learning theory as a process of making assumptions explicit, contextualizing them, validating them, and acting on them" (Cranton, 2016, p. 17.)

Paulo Freire's Pedagogy of the Oppressed *and Conscientization*

One of the best-known sociocultural approaches to transformative learning is Paulo Freire's (1970/2014) *Pedagogy of the Oppressed* (Merriam & Baumgartner, 2020). Freire's theory is grounded in oppression and illiteracy and exists within ideas of radical social change. A major concept proposed by Freire is conscientization, in which the learner slowly becomes aware of the oppressive forces in their life, which leads them to seek social change (Merriam & Baumgartner, 2020), a concept that Mezirow later echoed with his disorienting dilemma. For

Freire, conscientization begins with dialogue, in which "we find two dimensions, reflection, and action, in such radical interaction that if one is sacrificed—even in part—the other immediately suffers" (Freire, 1970/2014, p. 88). Freire's conscientization "consists of action and reflection in transactional or dialectical relationship with each other" (Dirkx, 1998, p. 3). Although Mezirow's work focused on personal transformation rather than social change, he nonetheless found a parallel between his ideas on perspective transformation and Freire's notion of conscientization (Baumgartner, 2012). Mezirow "believed that individual transformation preceded social transformation" (Cranton, 2016, p. 34). Conscientization, for Mezirow (1994), served "as a description of the same learning process as perspective transformation, but limited to critical reflection on-premises or beliefs pertaining to sociolinguistic codes" (p. 232). While Mezirow did not believe that perspective transformation enacted social change, he did imply that transformations within ourselves could lead to social change movements.

Mezirow's conceptualization of reflective discourse, which he viewed as an essential part of the transformative learning process (Merriam & Baumgartner, 2020), also built upon Freire's ideas. According to Mezirow (1997), through reflective discourse, "[w]e learn together by analyzing the related experiences of others to arrive at a common understanding that holds until new evidence or arguments present themselves" (p. 7). Such analysis, or "critical reflection," takes place "through problem posing and dialogue with other learners" (Merriam & Baumgartner, 2020, p. 175). Reflective discourse leads to "reflective action" for Mezirow (1994), who argued that it "often involves overcoming situations, knowledge, and emotional constraints" (p. 226). This concept echoes Freire's ideas on critical consciousness, through which a person understands "the forces that shape one's life space and become[s] an active agent in constructing a different, more just reality" (Merriam & Baumgartner, 2020, p. 176).

Evolutions of Mezirow's Theory

Habermas's Concepts of Knowledge and Learning

In the 1980s, Mezirow refined his theory based on Habermas's (1971) three kinds of knowledge: technical, practical, and emancipatory. In Mezirow's terms, these concepts became instrumental, dialogic, and self-reflective knowledge (Baumgartner, 2012; Kitchenham, 2008). Habermas's idea of technical knowledge, in which "[e]mpirical or natural scientific methodologies produce technically useful knowledge" (Cranton, 2016, p. 9), led to his criticism of instrumental rationality, which he argued too many people view as the sole epistemology used for knowing, into which category they attempt to "fit all knowledge" (Cranton, 2016, p. 9). While technical learning involves obtaining technical knowledge, which can be confirmed empirically, Habermas's idea of practical or communicative knowledge is how people survive as communities, since they must "communicate with and understand each other" (Cranton, 2016, p. 10). Habermas' communicative action is indeed grounded in the idea that all individuals want to understand one another. Through discussion and dialogue, we can achieve understanding, and in doing so, we agree that what others have to say has some value (Brookfield, 2005). Habermas's theory of communicative action argued that "if we could understand the conditions necessary for people to participate in full, free and equal discourse…we would have a theory…that would guide the operation of democracy" (Brookfield, 2005, p. 1127). Habermas's idea of emancipatory knowledge, produced through this dialogue, was based on self-determination, which is "gained through a process of critically questioning ourselves and the social systems within which we live" (Cranton, 2016, p. 11). Similarly, Mezirow argued that adult learning and transformation exist as a form of individual emancipation (Brookfield, 2005).

Mezirow's explanation of the differentiation between instrumental and communicative learning borrowed heavily from Habermas (Brookfield, 2005), whom he claimed helped researchers "understand that problem solving and learning may be instrumental…impressionistic…normative…or communicative" (Mezirow, 1997, p. 6). In contrast to instrumental (technical) learning, which relies on empirical testing and, according to Dirkx (1998), guides much of the adult education practice in North America, communicative learning involves "understanding purposes, values, beliefs and feelings and is less amenable to empirical tests" (Mezirow, 1997, p. 6). Drawing on Habermas's ideas of communicative knowledge and action, Mezirow (1997) argued that one must employ *critical reflection* to understand the "underlying intentions, values, beliefs and feelings" that cannot be discovered empirically—in other words, to engage in communicative learning (p. 6). Critical reflection examines "underlying assumptions, such as would lead to perspective transformation" but "is not a solitary activity but rather takes place…through discourse" (Jones, 2015, p. 269). Discourse is a path to evaluating beliefs that we have begun to question through critical thought—a way to "validate what is being communicated" (Mezirow, 1997, p. 6). Through discourse, "the process of transformation is promoted, developed and enacted" (Jones, 2015, p. 269). Mezirow also built on Habermas's ideas when speaking of the ideal conditions for discourse, which he viewed as integral to transformative learning (Baumgartner, 2012, p. 103).

This discourse and critical reflection is crucial to Mezirow's concept of perspective transformation, which is achieved through changes in individuals' *frame of reference* (Mezirow, 1997, p. 5)—a change that he referred to as transformative learning. As mentioned earlier, Mezirow (1994) initially referred to "meaning structures" as key to the theory of perspective transformation. Meaning perspectives, one dimension of meaning structures, are assumptions we

hold that shape our outlook on the world (Mezirow, 1994). Within our outlook on the world lies the other dimension, which forms our interpretation of ideas or a "manifestation of our meaning perspectives" (Mezirow, 1994, p. 223). As his theory evolved, Mezirow spoke of these two dimensions using the term "frame of reference" rather than meaning structures. Included in the frame of reference were habits of mind and points of view. Habits of mind, or how we see the world based on our background, experience, culture, and personality (Merriam & Baumgartner, 2020), create our points of view. Points of view can change because we receive feedback on them through dialogue and may become more aware of them through reflection, whereas habits of mind are more static (Merriam & Baumgartner, 2020). Therefore, when people change their habits of mind, "they are reinterpreting their sense of self in relation to the world" (Cranton, 2016, p. 7.) This reinterpretation of sense of self is what Mezirow refers to as perspective transformation.

The 10 Phases of Meaning

According to Mezirow, perspective transformation is not static. As Mezirow (1997) explained, points of view are "subject to continuing change as we reflect on either the content or process by which we solve problems and identify the need to modify assumptions" (p. 6). The importance of dialogue to transformation also continues to prompt change, as points of view are open to feedback and reviewed by others (Mezirow, 1997). Mezirow (2000) described 10 phases of meaning through which a person moves as they work toward a perspective transformation (see Figure 1.1). The phases are initiated by the experience of a disorienting dilemma.

Figure 1.1. The 10 Phases of Meaning in Perspective Transformation. *Note.* This model was created by the author based on Mezirow's concepts. Adapted from *Learning as transformation: Critical perspectives on a theory in progress*, by J. Mezirow, 2000, Jossey-Bass.

Perspective transformation is attained through these 10 phases and comprises three key components: frame of reference, critical reflection, and reflective discourse (see Figure 1.2). As will be discussed in more detail in the next section, this study utilized these three key components to both initiate and measure changes in perspective.

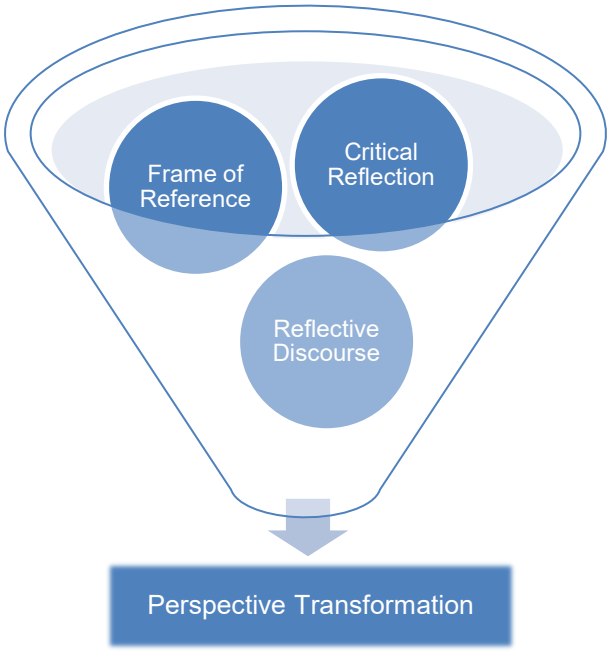

Figure 1.2. Key Aspects of Perspective Transformation. *Note.* This model was created by the author based on Mezirow's concepts. Adapted from "Transformative learning: Theory to practice," by J. Mezirow, 1997, *New Directions for Adult and Continuing Education*, *74*, pp. 5–12.

Expansions and Critiques of Mezirow's Theory

Other scholars who have adapted Mezirow's theory have argued that perspective transformation may not be spurred by an external challenge but from within our psyche. One such critical descendent is John Dirkx, who asserted in his conversations with Mezirow that "one of the outcomes of transformative learning is a fundamental change in what [Mezirow] refers to as a frame of reference" (Dirkx et al., 2006, p. 12). Dirkx argued that his approach to transformative learning is consistent with and articulates the work of theorists such as Mezirow, but with a focus on the experience of the learners' "inner world" rather than on the "cognitive, epistemic, and sociocultural dimensions of the learning process" (Dirkx et al., 2006, p. 126).

While Mezirow emphasized the crucial nature of critical self-reflection, Dirkx argued that an exclusive focus on this aspect "leads us to neglect the emotional, spiritual, and imaginative aspects of transformation and yields a limited, fragmented perspective rather than a holistic, whole person understanding" (Cranton, 2016, p. 40).

While Dirkx, like Mezirow, viewed transformation as individualist, his work focused not on "intentions, values, beliefs and feelings" (Mezirow, 1997) but rather on the "'shadowy' inner world" (Jones, 2015, p. 270), which includes "very personal and imaginative ways of knowing" (Cranton, 2016, p. 40). Thus, Dirkx's view of transformative learning necessitates "soul work or inner work" (Dirkx et al., 2006, p. 125). Cranton (2016) explained that Dirkx considered the soul

> through examples of experiences rather than through a definition – being awestruck by a sunset, gripped by pain and helplessness in the face of another's suffering. We experience soul through art, music, and film. It is that magic moment, a defining moment, which transcends rationality and gives depth, power, mystery, and deep meaning to the connection between the self and the world. (p. 40)

These concepts of the soul and inner world represent Dirkx's greatest divergence from Mezirow's ideas of transformation. According to Dirkx et al. (2006), the "experience of a disorienting dilemma" might not come from our frame of reference being challenged, but from "an autonomous core of ideas operating within the psyche that are only loosely connected" (Dirkx et al., 2006, p. 136).

Further critiques of Mezirow's theory have noted its lack of attention to social action in defining a perspective transformation (Merriam & Baumgartner, 2020; Taylor, 1998). Although Mezirow acknowledged that individual perspective transformation could potentially result in social action, he remained focused on individual critical self-reflection (Merriam &

Baumgartner, 2020). The lack of clarity in defining what constitutes the "outcome of perspective transformation" (Taylor, 1998, p. 42) represents another point of challenge from more recent scholars. Taylor (1998) conducted a review of multiple studies utilizing perspective transformation and noted, first, that "Mezirow's…definition [is] too narrow" to be functionally useful (p. 42) and, second, that most of the studies were retrospective, providing "little or no data for support or clarification" (p. 43). Finally, a major critique surrounds what Clark and Wilson (1991) asserted was the theory's omission of the role of context. According to Clark and Wilson (1991), Mezirow's theory fails to "maintain the essential link between the meaning of experience and the context in which it arises and by which it is interpreted" (p. 76). Thus, the exclusive focus on the individual in Mezirow's theory may overlook issues such as racism, classism, and sexism when exploring how and if perspectives are critically reflected upon or changed.

Empirical Studies in Higher Education/Study Abroad Settings Using Perspective Transformation as a Foundation

The empirical studies reviewed in this section were situated within the context of higher education, study abroad, or similar systems and used perspective transformation as their basis (see Table 1.7 for a summary). The studies discussed herein addressed perspective transformation in faculty development, teaching practices or the transformation that students experience as a result of participating in a study abroad program. Nevertheless, several notable gaps in the research concerning perspective transformation in higher education staff became obvious through this review, particularly in relation to practices employed in influencing students outside of the classroom, in study abroad recruitment, program creation and staffing. This study aims to supplement the literature in these areas.

Table 1.7

Empirical Studies Related to Perspective Transformation in Higher Education Settings and in Study Abroad

Author/date	Subject/purpose	Sample/methodology	Findings	Comments
King (2004)	Understand trends, challenges, influences, facilitating factors and barriers regarding transformative learning for educators and their professor in continuing professional development courses	Mixed methods; Learning Activities Survey (LAS); interviews; constant comparison *N* = 58	62% indicated they had experienced perspective transformation within their educational experience. Frequencies of persons influencing perspective transformation were ranked: teacher, classmate and advisor. Provides a basis for further use of transformative learning in professional development	Barriers to perspective transformation, such as fear of change, hesitancy to engage in internal critical reflection, questioning of values, beliefs and assumptions, were noted.
Franz (2002)	Learning in partnerships and collaborations that transform the individual, the partnership, and the organization	Combination of grounded theory and case study 10 successful extension staff partnerships Semistructured interviews Data analyzed using Eisenhardt's comparative case study method *N* = 10 partnerships	Transformative learning existed in six of the 10 partnerships and nine partners. Success came from: strong facilitation of reflective discourse, practice of thinking critically about individual, work or process assumptions (new assumptions arrived at through critical reflection resulted in broad views of work), and the presence of critical events and reflecting on the associated discomfort. Diverse perspectives enhance learning.	Personal change may happen without organizational change and vice versa, but joint transformation can result in quicker adaptation to change.

Author/date	Subject/purpose	Sample/methodology	Findings	Comments
			Joint leadership that facilitates reflective discourse around personal and shared assumptions promotes transformative learning.	
Cranton & Carusetta (2004)	Observe how faculty develop and transform their perspectives on teaching both naturally and as a result of interaction with the research team	Grounded theory New and experienced higher-education teachers who viewed themselves as authentic Interviews, observations and interviews *N* = 23	Generation of five categories for the purpose of further analysis: self, other, relationship, context and critical reflection Engagement of critical reflection on self, other, relationships and context Critical reflection is necessary for authenticity and transformative learning, though it is not explicit.	While this study was focused on teaching, it nevertheless involved relationships with students, and perceptions regarding relationships with students played a role in critical reflection.
Gravett (2004)	Through AR to change the perspectives and practices of higher-education teachers from a teacher-centered to a learning-centered dialogic approach	AR Qualitative data-generating methods such as journals, questionnaires, feedback meeting *N* = 60	Transformation in teaching perspective can be achieved through action research that involves inquiring and interactive teaching, but sustained support is required.	Perspective transformation can be achieved through AR.
Chiocca (2021)	Understand student experiences abroad and whether they perceived that they had changed and what they believed contributed to such change	Qualitative case study *N* = 6	All students experienced some level of perspective transformation as influenced by: directed and diverse conversations; hermeneutical reflections; emotional disequilibrium; intercultural competence development; student engagement in a classroom culture	Perspective transformation takes time, and all participants changed perspectives at different rates and times and could continue to do so for long after the study abroad program ended through continued reflection

King (2004)

King's (2004) study explored the experiences of 58 adult educators while pursuing graduate degrees. These educators took a course focused on critical reflection of their work, which King (2004) noted "resulted in substantial perspective transformation for 36 of the participants" (p. 156). The study employed a mixed method design and used the Learning Activities Survey (LAS) (King, 2004). The LAS, developed by King for use in higher education, "relies on the interpretation of answers to multiple questions in order to determine whether respondents experience perspective transformation" (King, 2004, p. 158). The findings of the 2004 study showed that by the end of the course, more than half of the respondents indicated a change in their frame of reference and a re-evaluation of their beliefs. The study noted the importance of understanding the trends, challenges, influences, facilitating factors and barriers regarding perspective transformation that existed in both the course in which participants were enrolled and the participants' personal lives. Barriers such as fear of change and hesitancy to engage in critical reflection and questioning of assumptions, values and beliefs are very real. The course professor asserted that the participants "need to find a part of themselves, which can step forward into change…[and] a place from which to grow" (King, 2004, p. 168). King (2004) also noted that creating opportunities for reflective practice is essential for perspective transformation to be experienced. The creation of opportunities for reflective practice, applied to professional development of educators as in this study, is crucial when considering the perspective transformation of higher education influencers, specifically administrators.

Franz (2002)

Franz's (2002) study on how learning in partnerships can effect transformative change in an organization also touched on "how to align individual transformation with larger

organizational change" (p. 2). Such alignment is highly relevant to my study, given that influencers in a higher education setting may first need to experience a perspective transformation in their own beliefs before they can change institutional processes or practices. Franz's (2002) study combined grounded theory with case study methodology. While learning in partnerships was the focus of the study, several conclusions emerged that shed light on how to achieve transformation. Most importantly, the study discovered that "to encourage transformative learning in staff, diversity management should expand to consciously ensure that staff work together with others who have differing personalities, work styles and worldviews" (Franz, 2002, p. 8). In the initial data collection of my AR study, I found that influencers working in the BME and in study abroad within the USS are quite homogeneous in race, gender and experience, which implies that interventions promoting work group diversity could contribute to transformative learning.

Cranton and Carusetta (2004)

A study conducted by Cranton and Carusetta (2004) examined faculty to understand authenticity in teaching. Cranton and Carusetta linked transformative learning and authenticity through critical reflection. The authors argued that faculty development should be based on the "need to be able to challenge the way things are done and have always been done" (Cranton & Carusetta, 2004, p. 7). This idea of critical reflection on the status quo is important when considering influencers' effects on the study abroad participation decisions of African American students. Since most students who study abroad are white women, most practices have been created to cater to this dominant demographic. To change these practices, critical reflection of the organization and one's role within it may need to be undertaken. Using a grounded theory methodology, the researchers studied 23 faculty members from different universities over a

three-year period. Participants were nominated due to being perceived as authentic teachers. The researchers held numerous focus groups, which were all transcribed and categorized. A total of five categories emerged: self, other, relationship, context and critical reflection. The categories of other and relationship express how faculty relate to students and acknowledge differences and awareness of those differences. This idea of how faculty—or, as it relates to this study, influencers—relate to and create relationships with students is important to how they would employ critical reflection. Do internal barriers prevent deeper relationships that may cause influencers to unknowingly act as barriers to study abroad for certain student populations?

Gravett (2004)

In 2004, Gravett conducted an AR project that sought to change teacher perspectives and practices in South Africa. The study included 60 teachers and spanned three institutions centered on teacher development. Gravett (2004) implemented a teacher development program that fostered transformative learning through four successive workshops. During attendance at the workshops and for three months following, participants were asked to maintain a reflective journal. The conclusions of the study included the positive impact of AR in exploring perspective transformation, suggesting that further AR studies are needed to explore perspective transformation in educational settings. Further, while Gravett's study revealed achievement toward perspective transformation among participants, it was also found that "putting the new perspective into practice required additional sustained input and support, involving support by management and colleagues" (Gravett, 2004, p. 270). This finding implies that postintervention community building should be considered to achieve sustained implementation.

Chiocca (2021)

Similar to the Gravett (2004) study, a study on student perspective transformation by Chiocca (2021) found that perspective transformation takes time and that sustained reflection will likely continue long after the study abroad trip ends. Therefore, institutions and influencers should attempt to sustain that reflection. Unlike the other studies highlighted in this section, this study focused directly on students and the perspective transformation they experienced through participating in a study abroad program. To emphasize the relationship between study abroad and perspective transformation, Chiocca (2021) highlighted a statement by Perry et al. (2012): when "a student's preconceived and established notions and beliefs are tested," such as experiencing a new culture through study abroad, it "may act as the catalyst or impetus for bringing forth a transformative experience" (Perry et al., 2012, p. 36).

Rejecting a binary approach to discern whether a perspective transformation occurred, Chiocca's (2021) study more closely examined the influences contributing to the participants' transformation. Through qualitative case study methodology, multiple sources of data were used, including semistructured interviews conducted 6 months after students returned from their study abroad trip. The findings were organized into five categories from most to least influential on perspective transformation: directed and diverse conversations, hermeneutical reflections, emotional disequilibrium, intercultural competence development, and student engagement in a classroom culture (Chiocca, 2021). Notably, engaging in directed and diverse conversations and reflections exerted the most influence over perceived transformation. This finding further supports the idea of building a community of higher education influencers, not only while interventions are being implemented but also for a dedicated time after interventions and

evaluations are completed to allow for examinations of assumptions and reflections across a sustained period.

Summary

Cranton (2002) argued that we cannot reflect critically on an assumption if we are not yet aware that an assumption is held. Assumptions, by their very nature, "have been uncritically assimilated and are largely unconscious" (Cranton, 2002, p. 66). Thus, this study sought to prompt critical self-reflection in the USS's study abroad community through the AR team's application of transformative learning theory in the creation of questions concerning their practices and processes that influence their students' decisions about study abroad participation. Posing such questions created the external disorienting dilemma needed to catalyze critical self-reflection. Through this opportunity for reflective discourse and critical reflection through such interventions, many study participants changed their points of view, which may subsequently alter their habits of mind and reduce or eliminate assumptions about who "should" and can participate in study abroad. Ultimately, the goal of this approach is to create, through such changes, an ethos that is positive toward study abroad within and for the BME community throughout the university system.

Purpose and Research Questions

The purpose of this AR study was to explore how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. The project's goal was to introduce study abroad advisors to other USS professionals who represent demographics, such as African American male students, that participate in study abroad at low rates, provide study abroad advisors with information regarding inclusive practices and then engage in discourse and reflection guided by

transformative pedagogies. Ultimately, the communal experience of new learning by groups or communities may heighten or lessen the transformative outcomes. This study's interventions were created based on transformative pedagogies and Mezirow's (1994, 1997, 2000) theory on perspective transformation. The following research questions guided my inquiry:

What is learned at the individual, group, and system levels that advances theory and practice in an AR project focused on perspective transformation?

To what extent were transformative outcomes facilitated in interventions designed based on transformative pedagogies?

This study was conducted at and situated within a university system, the University System of the South (USS), composed of four types of institutions: research, comprehensive, state universities, and state colleges. This AR study will provide insight into the outcomes of creating interventions based on transformative learning theory. Within the context provided by this study, we can better understand how unexamined system structures and processes have perpetuated the problem of low participation rates of African American male students in study abroad.

CHAPTER 2

METHODOLOGY

This chapter outlines the methodology used in this study, including the study's design, data collection methods, and data analysis methods used to reach the findings and insights. The purpose of this action research (AR) study was to explore how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. The following research questions guided my inquiry:

> *What is learned at the individual, group, and system levels that advances theory and practice in an AR project focused on perspective transformation?*
>
> *To what extent were transformative outcomes facilitated in interventions designed based on transformative pedagogies?*

This study was conducted at and situated within a university system, the University System of the South (USS), composed of four types of institutions: research, comprehensive, state universities, and state colleges. The project pursued by the AR team was enacted with the goal to introduce study abroad advisors to other USS professionals who represent demographics, such as African American male students, that participate in study abroad at low rates, provide study abroad advisors with information regarding inclusive practices and then engage in discourse and reflection guided by transformative pedagogies.

Overview of AR Methodology & Research Design

The methodology used in this study was action research (AR), which uses a "scientific approach to study the resolution of important social or organizational issues together with those

who experience these issues directly" (Coghlan, 2019, p. 58). Due to its collaborative premise and exploration of a problem, AR operates differently than traditional research. In traditional research, the researcher selects a topic, moves to a review of the literature, and then begins field study. In AR, the researcher starts with a known problem and takes actions, along with a team of invested partners known as the AR team, to resolve the problem for benefit of the organization or society (Coglan & Pedler, 2007). As its name implies, AR facilitates action, which is achieved through a reflective cycle (Dickens & Watkins, 1999). Coghlan (2019) outlined an AR cycle comprising an initial preparatory step that includes context and purpose framing, followed by "four basic steps: constructing, planning action, taking action and evaluating action" (p. 9), which is illustrated in Figure 2.1.

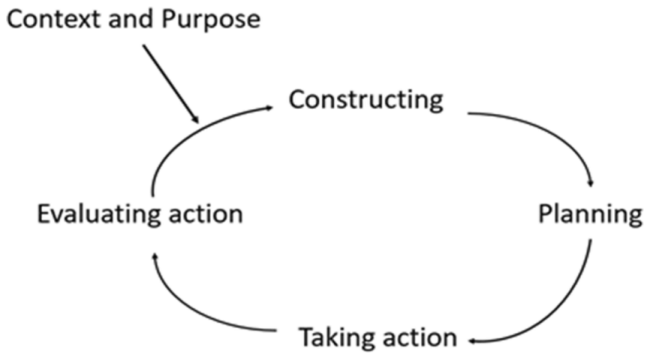

Figure 2.1. The AR Cycle. *Note*. This figure illustrating the AR cycle was created by Coghlan and Brannick. From *Doing action research in your own organization* (4th ed., p. 8), by D. Coghlan & T. Brannick, 2014, Sage.

In the context and purpose stage, the researcher assesses the need for the change as well as the context within which the problem exists. In the constructing stage, the researcher forms an AR team and works, in collaboration with that team, to decide on what actions to take to solve the problem in real time. Next, the team plans steps to take prior to taking the action. In the third stage, the AR team takes action by implementing carefully constructed plans and interventions. Finally, the actions taken are evaluated to determine whether the desired change was realized. If not, or if at any point along the way a reevaluation or restructuring of the plans or interventions is needed, the cycle restarts. Coghlan's cycle is intended to be iterative, and in most AR projects, "there are multiple action research cycles operating concurrently" (Coghlan, 2019, p. 11). Choices are inherent to the AR cycle laid out by Coghlan. These choices frame the iterative nature of AR and determine the number of cycles needed. Reason (2006) highlighted that the numerous choices a researcher and AR team make in these stages lays the groundwork for creating quality within that research. Since AR takes place in the present tense, the choices made throughout the process are important not just from a quality perspective but also from an ethical perspective. As Coghlan (2019) explained, "[a]n integral element of making choices in the present tense is how you make value judgements and decide what is a good (or better) course of action" (p. 16). Since AR is a collaborative endeavor, the choices made throughout the research must also be collaborative. This necessity therefore touches on a core premise of AR, which is that it represents "inquiry in the pursuit of worthwhile purposes, for the flourishing of persons, communities, and the ecology of which we are all a part" (Reason, 2006, p. 188).

For this study, AR was a good fit due to its collaborative nature and democratic ideas. While the study focused on study abroad within institutions of higher education, it also touches on deeper social problems surrounding equality and social capital held by certain members.

Utilizing AR along with transformative learning theory (Mezirow, 1994) in a study based in a large university system allowed participants from 26 colleges to engage with transformative pedagogies. Informed by data collected in real time, the AR team created interventions around a thoroughly researched, defined problem.

In alignment with its underlying theoretical framework, this study was designed to allow reflection to play as large a role as possible. Without a reflective component, AR cannot succeed, nor can perspective transformation occur. Bradbury-Huang (2010) explained that the self must be acknowledged as a mechanism for the goal of change in action, which is obtained through reflexivity. While all participants in AR must engage in reflection, the self-reflection practiced by the researcher is a crucial indicator of excellence and success in the project. Reflection is how practitioners deal with the "non-technical 'swampy' problems that defy rational inquiry. Practitioners need to be reflective in order to deal with these messy problems" (Coghlan & Pedler, 2006, p. 131). Reflection was an essential way to discover known and unknown biases that affected project outcomes. Additionally, reflection is innately emancipatory in that it allows us to escape from routine behavior and thought and provides for a better understanding of embedded issues within organizations, helping to propel us to the desired change.

Mezirow (1994) explained that most reflection takes place as part of the process of solving problems, such as in AR. He defined reflection as falling into three categories:

1) Content reflection, which is an examination of the content of a problem;

2) Process reflection, which concerns how the problem exists and is being addressed in its current state;

3) Premise reflection, which critiques underlying assumptions and perspectives.

Through the various AR cycles of this study, all three types of reflection were utilized. Reflections were captured from both the researcher and participants through journaling, interviews, and transcribed reflective discourse.

Because AR takes place in the present, it requires constant examination and evaluation of what is occurring to decide on what should happen next (Coghlan, 2019). This examination is realized through both reflection-on-action and reflection-in-action. Reflection-on-action helps us move past merely thinking about a situation toward deeper thinking and, thus, toward action and change. Coghlan and Shani (2014) asserted that our "attentiveness to what is happening at any given moment during the research is what yields purposeful action" (p. 525). Reflection-in-action, in which a practitioner conducts on-the-spot experiments within the situation, allows for a nimble research process in which endpoint scenarios are changed through practical knowledge. As Schön (1983) explained, "reflection in action…is central to the art through which practitioners sometimes cope with the troublesome 'divergent' situations of practice" (p. 62). The depth, effects, and repetition of reflection on and into oneself by those conducting AR help determine the quality of and serve as a driving force behind the change we ask AR to elicit. To ensure the quality and rigor of the AR methodology, the AR team worked to ensure that they engaged in the steps of the AR cycle; recorded them in a transparent way; "[challenged] and [tested their] own assumptions and interpretations" (Coghlan, 2019, p. 16) through continuous reflection at the personal and group levels; "[accessed] different views" of events (Coghlan, 2019, p. 16) and documented whether those views upheld or challenged past assumptions; and grounded their interpretations "in scholarly theory…rigorously applied" (Coghlan, 2019, p. 16).

Data Collection Methods & Sample

To address my research questions, I used a deductive analytical approach. This "theory-first" approach allowed the theory to determine the data and offered a guide path for the study (Miles et al., 2020). The conceptual framework of perspective transformation (Mezirow, 2000) and the use of transformative pedagogies wholly guided this study. Many data collection methods were employed. Data sources included public and internal data and documents, transcripts of AR team meetings, surveys, interviews, a book club, as well as researcher and AR team journaling. The research design is detailed in Table 2.1.

Table 2.1

Research Design

Method	Data	Sample	Proposed timeline	Research construct
Document collection	National study abroad participation data by race and gender; USS study abroad participation data by race and gender	National U.S. study abroad participation data provided by IIE; USS study abroad students	Pre-interventions	Purpose framing
Dichotomous item survey	Perceptions of influence and study abroad	AR team; USS BME advisors; USS study abroad advisors; USS student affairs staff	Pre-interventions	Purpose framing
Interviews	Critical incident technique	Study abroad advisors	Pre-interventions	Purpose framing
Interviews	Book club discussion	Study abroad advisors	Pre-interventions	Transformative pedagogy (critical self-reflection)
Survey/ interview	Post-book club survey or critical incident review	Study abroad advisors; other	Postintervention	Transformative pedagogy (critical self-reflection)

Method	Data	Sample	Proposed timeline	Research construct
	(CII); pre and post proposed interventions	intervention participants		
Interviews	AR team meeting transcripts; AR team journals (question response); CII	AR team	Pre- and postinterventions; post study	Transformative pedagogy (critical self-reflection)
Focus groups	Transcripts of directed discussion mid- and postintervention	Study abroad advisors	Mid- and postintervention	Transformative pedagogy (critical self-reflection)

Document Collection

The publicly available data regarding national study abroad participation rates by both sex and gender were available through the Institute of International Education (IIE)'s *Open Doors* report. The USS-wide data regarding study abroad participation by both sex and gender were available to me from both USS institutions and IIE through reverse data sharing.

Dichotomous Item Survey

A survey uses questions to "collect data from a sample that has been selected to represent a population to which the …analysis can be generalized" (Gall et al., 2006, p. 223). A survey allows the respondent to complete it at their convenience within a given time frame. Upon the start of the AR project and within the first cycle, the AR team created a simple binary survey to capture perceptions of influence and study abroad. This survey was shared widely with AR team members, BME advisors, study abroad advisors, and student affairs staff (defined as anyone self-selecting as student affairs staff). The items are provided below:

I1: I am familiar with study abroad

I2: I understand study abroad

I3: I feel comfortable talking to students about study abroad

I4: I understand why some students study abroad

I5: I feel that study abroad is not meant for all students

I6: I understand why some students study abroad

I7: I feel that study abroad is not meant for all students

I8: I feel that some students are more likely to study abroad than others

I9: A student's background influences how I may talk to them about study abroad

I10: I am concerned that participation in study abroad is not realistic for some students due to the costs involved

I11: I am concerned that some students would face discrimination on study abroad programs to certain locations

I12: I am concerned that some students will feel isolated during the trip if they participate in study abroad

I13: I feel students will experience greater success if they participate in study abroad

I14: In my position at an institution of higher education I feel I have influence over student's decisions to study abroad

I15: In my position at an institution of higher education I feel that I self-select which students might benefit from study abroad

Interviews

A critical incident interview (CII) was the first type of interview employed. John Flanagan (1954) first developed the critical incident technique (CIT), which "consists of a set of

simple interview procedures for collecting information from people about their direct observations of their own and others' behavior" (Woolsey, 1986, p. 243). The basis of CIT and the reason for using it "are that factual reports of behavior are preferable to ratings and opinions based on general impressions" (Woolsey, 1986, p. 244). When using the CIT, a researcher determines the purpose of the interview and the type of data they want to obtain, conducts the interview, analyzes the data collected, and then reports the findings. The CIT is a powerful tool in qualitative study that assists researchers in "uncovering context and capturing meaning" (Butterfield et al., 2005, p. 489).

I employed the CIT with study abroad advisors to explore significant incidents regarding their interactions with African American male students about study abroad participation. Considering the theoretical framework of perspective transformation, I asked questions that would not only highlight participants' interactions (or lack thereof) with this student population but would also serve as an intervention to determine whether consideration of these incidents might ignite a disorienting dilemma regarding practices that could be clouded by bias or a lack of consideration influenced by the dominant demographics in study abroad offices. Three interviews were conducted with advisors from three different schools within the USS. The interviews were conducted over Microsoft Teams, which provided both a recording and a transcription of each interview. For validation, the transcripts and recordings were shared with the interviewees.

In addition to the CIT, I also utilized informal conversational group interviews on two different occasions. This type of interview "relies entirely on the spontaneous generation of questions" (Gall et al., 2006, p. 239). For the first interview, a group of study abroad advisors (including one who also participated in the CIT) read Anu Taranth's (2019) book *Beyond Guilt*

Trips: Mindful Travel in an Unequal World. The book deals with discomfort, privilege, differences, and accountability regarding study abroad programs. To prevent researcher bias from entering the conversation, I did not pose specific questions but simply facilitated a conversation about the book. I held space in Zoom for a group discussion that included four study abroad advisors (although six advisors agreed to read the book, two were unable to attend the discussion). This interview was created to serve as both a form of data collection and as an intervention. The discussion was transcribed, and key themes were noted and used in discussions surrounding interventions. This data collection/intervention was performed to spur critical self-reflection on both personal and organizational processes and practices in study abroad programs. The second informal conversational group interview took place during the Inclusive Advising Discussion & Sharing workshop. Discussion questions were prepared in advance but allowed for additional questions to develop throughout the conversation. This group interview was conducted over Zoom and recorded. The transcript was transcribed and coded.

Finally, another informal form of interview was ongoing with members of the AR team. After each AR team meeting in Cycle 1, I posed a question to the group via email to which they responded. I used these responses to build a "journal" for each AR team member. Questions posed are included below:

> ***AR Meeting #1****: Based on our conversation today, do you feel that this study into how influencers affect study abroad participation decisions is important? Did any part of the conversation surprise you? Do you think any differently about your role as an "influencer" based on our study topic or today's conversation?*
>
> ***AR Meeting #2****: Do you think it is possible to change someone's perspective? If you can remember a time in the past when your perspective changed, how did it happen (listening*

to someone else, reflection after hearing or reading something new, experiencing something new for the first time)? Has your perspective changed since we started?

AR Meeting #3*: As you think about our last meeting and the momentum we are starting to collect, I wonder if any of you are aware of the request made by a state representative to all schools to provide information on "efforts represented as increasing institutional diversity, equity, inclusion, advocacy and activism."*[2]

Journal Prompt (please reply just to me): How does a request like this make you feel regarding the work we are doing? How well do you think any interventions we propose will be accepted from a system perspective in light of a request like this?

AR Meeting #4*: Why did you choose to be a part of this action research team? Do you think the interventions we have planned will help solve our problem of low participation of African American male students in study abroad? Are there other aspects to the problem we haven't diagnosed yet that you want to bring up? How does your role in your current community affect how you see the problem?*

Focus Groups

Focus groups, also originally called focus interviews, were first discussed in the mid-1940s as a "methodological innovation" that "would allow interviewers to gather specific information from participants around delimited topics" (Kamberelis & Dimitriadis, 2013, p. 7). A focus group allows a researcher to control the topic of the conversation and therefore quickly gauge participants' thoughts on chosen topics. By the 1960s, the concept of a focus group was evolving toward becoming the domain of marketing firms and corporations. Eventually, the power of the group was realized as an important social component and, based in Freire's use of

[2] Incomplete information is provided to preserve anonymity.

study circles (Freire, 1970/2014), has become an important methodology in qualitative research (Kamerelis & Dimitriadis, 2013).

In conducting these focus groups, I aligned with Barbour's (2008) definition, which explains them as "a group convened for research purposes that relies for data on the discussion generated between participants" (p. 156). I convened two focus groups: one at the start of the study with potential AR team members and one at the end with study abroad advisors who had participated in two major study interventions. Both focus groups were conducted over Zoom, recorded, transcribed and then coded for analysis.

Sample

The sample for this study was both purposive and theory driven (Miles et al., 2020). The initial boundaries of this study included higher education faculty and administrators associated with both the BME and study abroad within the USS. As the study evolved, the sample included BME advisors, study abroad advisors and the AR team. Therefore, the choice of participants was purposive to ensure their association with the BME or study abroad with a confirmed affiliation with the USS. Moreover, due to the nature of the perspective transformation theory, the conditions under which the theory operates were specific to the following participants.

AR Team

The stakeholders associated with my study included study abroad faculty and staff and BME campus faculty and administrators. The selection and creation of the AR team is detailed in Chapter 3.

BME Advisors

The BME is a leadership development program unique to the USS that aims to support the academic and future goals of any student identifying as male and African American. As the

aim of the study was to explore the issue of this group's low participation rates in study abroad, the advisors who work with BME students were essential to the study and assisted the study abroad advisors in reflecting on their current practices.

Study Abroad Advisors

Because study abroad participation within the USS lies at the heart of this study, study abroad advisors and their critical reflection on their perceptions and practices were essential to the study. Initial data collection indicated that current practices employed by most USS study abroad offices cater to the mythical norm, a concept introduced by Audre Lorde (1984) in *Sister Outsider*. The mythical norm employs a white, young, Christian man of high economic status to represent everyone. In the case of study abroad, the term general population is used when creating programs and material, but through current data collection, I have found that "general population" may in fact be referencing a study abroad mythical norm, only women rather than men.

Data Analysis Procedures

The data analysis for this project occurred in tandem with each of the three cycles. Miles et al. (2020) recommended that the researcher "cycle back and forth between thinking about the existing data and for collecting new, often better, data" when collecting data for a qualitative study (p. 62). This approach was employed due to its alignment with the cyclical nature of AR. Continuous adherence to the conceptual framework utilizing the analysis methods described within this section allowed me to collect the data necessary to address the research questions of this study.

Most of the data collected in this study was interview based. All interviews were held virtually over Microsoft Teams or Zoom due to distance issues and were transcribed through

Otter.ai. All postintervention surveys and questionnaires were created in Qualtrics. Responses were given numerical coding, and Microsoft Excel was used for quantitative data analysis. The quantitative data was analyzed and is covered in depth in Chapter 4.

The recent survey instrument known as the Transformative Outcomes and PrOcesses Scale (TROPOS) (Cox, 2017, 2021), created to measure transformative learning quantitatively, was utilized in this study and generated all quantitative data. The TROPOS is a "brief instrument (30 items) divided into four modular subscales" (Cox, 2017, p. 101): *social support*, *attitude towards uncertainty*, *criticality*, and *transformative outcomes*. The *social support* subscale measures "a learner's constructive engagement with a social group whose members exhibit mutual trust and respect, thereby facilitating a balance between support and constructive critique" (Cox, 2021, p. 385). *Attitude toward uncertainty* measures "a learner's attitude toward anticipating or experiencing a loss of certainty, typified by feeling stumped, confused or experiencing a sense of stepping outside one's comfort zone" (Cox, 2021, p. 385). Cox (2017) noted that items in this category "may represent attitudes that further a learner's willingness to engage in critical reflection as well as other latent constructs" (p. 92). The *criticality* subscale measures "a learner questioning beliefs of oneself and others (regardless of method), evaluating the validity of such beliefs, and re-framing these beliefs" (Cox, 2021, p. 385). Finally, the *transformative outcomes* subscale measures an effect of the first three subscales by assessing "a learner's profound re-assessment of beliefs, typified by changed assumptions and a more inclusive, open perspective toward self and others" (Cox, 2021, p. 385).

Cox (2017) defined the first three subscales as learning scales, dividing them into process themes of stabilizing or destabilizing characteristics. In the TROPOS (Cox, 2017) subscales, *social support* is used to demonstrate a stabilizing characteristic, which "play[s] a central role

among learners undergoing transformative learning, primarily through facilitating coping mechanisms and resilience, thereby keeping a learner's sense of vulnerability, often inherent in transformative learning, manageable" (p. 41). Destabilizing characteristics are demonstrated in the subscales through *attitude toward uncertainty* and *criticality*, which "serve as disruptive elements in learning that push a learner away from comfort and habit and into an exploratory phase of identifying, questioning, and re-framing assumptions" (Cox, 2017, p. 41). A visual representation of this conceptualization is shown in Figure 2.2.

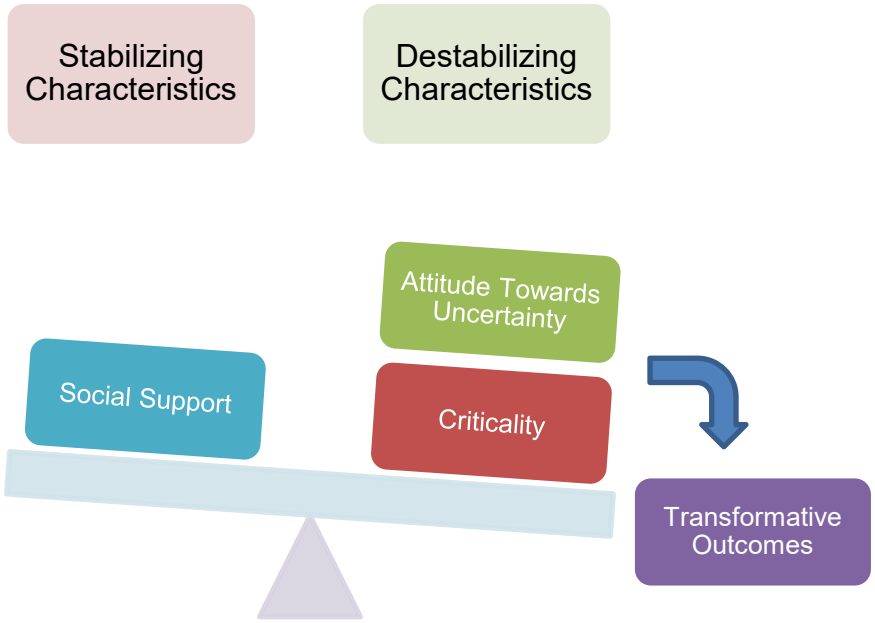

Figure 2.2. Stabilizing and Destabilizing Characteristics of TROPOS Subscales. *Note.* Adapted from "Grounding Transformative Learning Through Assessment: TROPOS (Transformative Outcomes and PrOcesses Scale)," by R. Cox, 2021, *Journal of Transformative Education*, *19*(4), 383–399. https://doi.org/10.1177/15413446211045163. Copyright 2021 by Sage.

In this study, the TROPOS (Cox, 2017, 2021) was administered after two separate interventions by emailing participants a link to a Qualtrics survey within 24 hours after the intervention. For a full list of TROPOS survey items, see Cox (2021).

After transcription, the first coding cycle was implemented within Microsoft Excel. I employed the four subscales of the TROPOS survey outlined above—social support, attitude towards uncertainty, criticality, and transformative outcomes—in my approach to deductive coding. Deductive coding consists of coding via a predetermined set of codes (Saldaña, 2021). To start my coding, I first created an Excel worksheet consisting of the following tabs: story chronology, visual data, codes, each intervention (see Chapter 3 for a listing of all interventions), and findings. These tabs evolved throughout the time I spent coding. After utilizing this initial coding scheme, I found that more codes were needed, which I employed inductive coding to generate. Saldaña (2021) described inductive coding as a "learn as you go approach" that allows the researcher to "spontaneously [create] original codes the first time data are reviewed" (p. 41). In the second round of coding, I employed my deductive coding theme using the four subscales referenced earlier plus the additional code I had created through inductive coding, which I termed *anti-criticality*. I created this code to capture places where I noted resistance to change or a person not allowing themselves to reflect on their beliefs or practices critically. As I read the transcripts, I pulled quotes that fit into the different subscale/coding categories, entered them in the designated tab in the spreadsheet, and marked them with the code and associated color that I had previously assigned on my coding tab. This detailed worksheet, which included a story chronology outlining the entire study in chronological order, allowed me to code my data in chronological order. I employed an ordering matrix, or *ordering by time*, which provided an organizing framework that allowed me to examine my data as it changed over time (Miles et al.,

2020). To continue the chronological analysis of my data, I moved each coded quote to the Codes tab in my worksheet in chronological order so that I could see the points at which the most transformative outcomes emerged. Due to the simple nature of my coding scheme, my codes were aligned with the TROPOS subscales themes from the start.

Ensuring Trustworthiness

Trustworthiness "strengthens the value of a research study" (Amankwaa, 2016, p. 121) and determines its rigor by ensuring the accuracy of data and the subsequent analysis. It is essential to qualitative research. At the start of my study, I created a database in Microsoft OneNote that included field notes, researcher memos, and reflections. Further, I secured and backed up the personal drive where I stored all documents, journals, audio, video, and transcriptions of meetings and interviews collected throughout the process. Yin (2018) recommends this practice of creating a case study database to serve as an "orderly compilation of all the data" (p. 176) from the research. These practices allow for the confirmability of this study. Two credibility and validity strategies utilized in this study were triangulation and member checking. Triangulation is meant to "support a finding by showing that at least three independent measures agree" (Miles et al., 2020, p. 293). Triangulation is best achieved by selecting different but complementary types of sources. Member checking is a way to confirm that a participant's perspective was captured accurately by having participants "review statements for …accuracy and completeness" (Gall et al., 2006, p. 464).

The dependability of the study was ensured by the chain of evidence, or audit trail, which provides "meaningful links between research questions, raw data, and findings" (Gall et al., 2006, p. 461). Providing an audit trail allows readers to trace the research process from the

inception of the research question through to the initial collection of data and on to its application in the researcher's analysis and interpretations (Gall et al., 2006).

Finally, as someone engaging in a qualitative study, I documented my personal assumptions and thoughts on the data and direction of the study in a research journal. My personal relationship to the subject matter and investment in the success of the study could cause bias either away from or toward the theoretical framework. Therefore, I documented assumptions and biases throughout the study. My engagement in actions to ensure trustworthiness throughout the study are condensed below in Table 2.2.

Table 2.2

Trustworthiness Measures

Data collection method	Trustworthiness
Meeting notes/transcripts	✓ Audit trail ✓ Triangulation
Questionnaires/surveys	✓ Audit trail ✓ Triangulation
Critical incident interviews	✓ Audit trail ✓ Triangulation ✓ Member checks
Participant journals	✓ Audit trail ✓ Member checks
Researcher journal and notes	✓ Audit trail

Subjectivity Statement

I, as the researcher, have an interest in finding ways to encourage all students, but especially those who do not currently participate in study abroad, to take advantage of these opportunities. As the director of international education (IE) for the USS, I believe that study abroad experiences lead to greater student and life success and am therefore biased toward others

accepting that view. Moreover, over the past several years, and certainly since the social change movement ignited by the death of George Floyd and other black men and women in 2020 that put a spotlight on social inequities in American culture, I have been able to observe the considerable extent to which the field of study abroad is geared toward a specific demographic. In my role of managing the data and looking to raise participation rates across the USS, I have pushed numbers over diversity. My bias is now toward inclusion and diversity within the field of study abroad and making programs accessible to all students, particularly those who have been historically—and continue to be—marginalized.

As a white professional woman, I represent the majority of students who study abroad as well as the majority of people who work in the field. Knowing this, I hold certain assumptions about why some faculty and staff may not support or encourage a student to study abroad. On several occasions, I have encountered statements from college and university administrators at all levels asserting that their students do not study abroad. Depending on the person delivering the message, I may assume that someone thinks that study abroad programs are not meant for their students based on race, class, or gender, but I do not know this to be true. I endeavored throughout this study to keep my assumptions from biasing interviews and data collection.

Additionally, I acknowledge that, as a white woman, I have many blind spots regarding the structural or historic problems that have allowed certain demographics to take advantage of study abroad while others have never been able to consider it. These blind spots exist not just with students but also with the administrators whom I studied. I engaged in constant reflection to make sure that I was aware of these blind spots. Finally, I acknowledge that due to my 26-year career within the USS, I may have biases regarding my organization and the ability or inability to create change within it.

CHAPTER 3

THE ACTION RESEARCH STORY

A single stone thrown into the water sends dozens of ripples in every direction. And whether that be in the middle of the ocean or the confines of a single puddle, those ripples cover an area hundreds of times larger than the point at which the stone landed. Therefore, it's not where we land. Rather, it's the impact of our landing.

–Craig D. Lounsbrough

Chapter 3 tells the story of my action research (AR) study, which was an effort to start a ripple of change in processes and practices individually, with a community, and within a larger system. This story is about collaboration, how social support affects transformative outcomes, and what is needed to sustain those outcomes.

Researcher's Background and Role

In introducing the story of my AR study, it is important to explain my background and role within the system where the study took place. I have worked within the University System of the South (USS), which comprises 26 public colleges and universities in a southern U.S. state, for just over 26 years. During that time, I have held different roles, but most were within the area of international education (IE) that deals with international students and scholars. In 2015, I transitioned from working on campus and began working at the USS central office, which oversees all USS campuses. My new role at the USS involved working with all aspects of IE, which now included study abroad as part of my portfolio.

When I began my role at the USS central office as director of IE, I visited as many campuses as possible. A campus visit helps one get a feel for the culture of an institution by observing aspects such as how the campus is maintained, how the students interact, and how busy or quiet campus feels. I noticed on these visits that when I would meet with IE offices,

provosts, and even presidents, the reception I received in conversation directly correlated with their campus study abroad participation numbers. I noticed immediately that on many of the smaller campuses, administrators quickly cut off conversations regarding study abroad, saying that "our students don't have the money or time to study abroad." In this context, I began to wonder about how administrators who control information may be exercising bias about such students when sharing (or failing to share) that information.

Purpose and Research Questions

The purpose of this AR study was to explore how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. The project's goal was to introduce study abroad advisors to other USS professionals who represent demographics, such as African American male students, that participate in study abroad at low rates, provide study abroad advisors with information regarding inclusive practices and then engage in discourse and reflection guided by transformative pedagogies. Ultimately, the communal experience of new learning by groups or communities may heighten or lessen the transformative outcomes. This study's interventions were based on transformative pedagogies and Mezirow's (1994, 1997, 2000) theory on perspective transformation.

The following research questions guided my inquiry:

What is learned at the individual, group, and system levels that advances theory and practice in an AR project focused on perspective transformation?

To what extent were transformative outcomes facilitated in interventions designed based on transformative pedagogies?

Stakeholders

The stakeholders associated with my study include study abroad faculty and staff, Black Male Enterprise (BME)[3] campus faculty and administrators, and upper-level administrators overseeing these programs. Within the USS, the BME program is active on 22 campuses, and 24 of its campuses have some active staff working in study abroad. With such a large number of stakeholders, I felt that when considering an AR team, I should choose stakeholders from campuses that have either very strong BME or study abroad representation, as their voices and reflections will be necessary to gauge change. Further, I evaluated stakeholders through a stakeholder analysis employing three criteria: power/influence, legitimacy, and urgency. These criteria are elaborated in Figure 3.1 below.

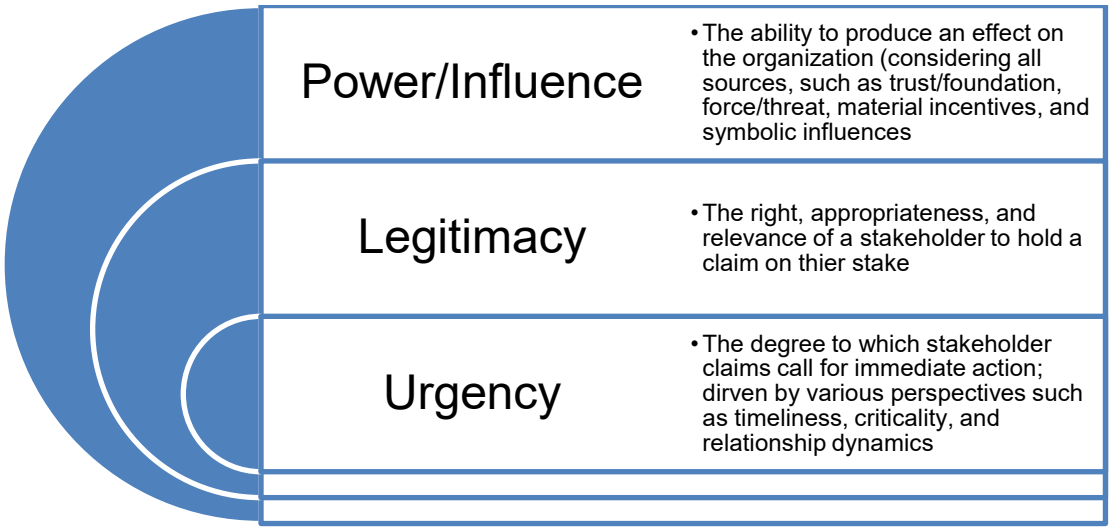

Figure 3.1. Stakeholder Analysis Criteria. *Note.* Adapted from notes on a lecture on leading organization change by W. Ruona, personal communication, September 18, 2020.

[3] Pseudonym.

Each criterion is ranked on a scale from 1 to 3, with 3 being the highest. Table 3.1 provides an overview of the stakeholder analysis with ranking scores.

Table 3.1

Stakeholder Analysis

Stakeholder role	Power/ influence	Legitimacy	Urgency
Director of International Education, USS	3	3	3
Executive Vice Chancellor and Chief Academic Officer, USS	3	3	1
Associate Vice Chancellor, Strategic Academic Initiatives, USS	2	2	3
Director, BME, USS	2	2	3
Study abroad directors	2	2	2
BME campus staff	2	2	2
Vice Chancellor of Research and Policy Analysis, USS	1	1	1
Student success staff	2	2	1

Note. Adapted from notes on a lecture on leading organization change by W. Ruona, personal communication, September 18, 2020.

AR Team Recruitment

At the outset of this study, I carefully considered ideal candidates for the AR team. Action research "consists of a team of practitioners…who cycle through a spiral of steps including planning, action, and evaluating the result of action" (Dickens & Watkins, 1999, p. 132). I assembled a team of practitioners who were both stakeholders and were directly interested in the research project's outcomes. Balancing members of the study abroad community and the BME community was important to this AR project. The initial AR team

members were the result of a pilot focus group, which is explained in detail later in this chapter, but as the AR project evolved, so did the AR team. Ultimately, the AR team for this project consisted of five team members representing a variety of campuses, all working with either BME or in study abroad. Team members are referred to by anonymous identifiers (e.g., TM1, TM2) when cited in this study. A summary of the AR team members and team development is provided in Table 3.2.

Table 3.2

The AR Team (March 2021 – April 2023)

Name	Institution	Title	Focus	Race/gender
Team Member #1	USS	Director of BME	BME	Black/woman
Team Member #2	State Medical University	Study abroad director	Study abroad	White/woman
Team Member #3	Western State University	Faculty, coordinator of BME	BME/study abroad	White/man
Team Member #4	Eastern State University	Director of BME and associate professor of mathematics	BME	Black/man
Team Member #5	USS	Policy analyst	Departed team May 2022	Unknown/woman
Team Member #6	SCS	Study abroad manager	Study abroad (joined May 2022)	White/woman
Researcher	USS	Director of international education	Study abroad	White/woman

AR Study Context

Organizational Context

The USS comprises 26 public colleges and universities in a southern U.S. state. These institutions cover four higher education sectors, including four research universities, four comprehensive universities, nine state universities, and nine state colleges. The USS consists of six administrative units: Academic Affairs, Administration, Economic Development, Government Affairs, Internal Audit, and Strategy & Fiscal Affairs. The Division of Academic Affairs is overseen by an executive vice chancellor for academic affairs. Reporting to the executive vice chancellor are the IE office—a subunit of student affairs—and the BME. The research took place as a collaboration between the IE and BME offices as well as with representative administrative staff and faculty from select USS institutions.

The IE and BME offices have collaborated in the past and began working together in earnest in 2019 after the Consortium for Analysis of Student Success through International Education (CASSIE) data was released. Past collaborations included bringing together BME campus leaders and study abroad leaders from the same campus to meet, network, and work toward more numerous and individualized collaborations. Within the USS, I serve as the director of IE. In this role, I provide system-wide leadership for strategic planning, policy interpretation, and coordination of IE initiatives. I assist the 26 campuses within the USS with all aspects of campus internationalization, study abroad program development, and international student and scholar services. I also administer the USS J-1 exchange visitor program and a system-wide study abroad consortium known as USS Global. Given my position of leading strategic initiatives and IE efforts and overseeing the USS study abroad consortia, I reached out to the BME program to discuss ways to promote study abroad within the BME framework. Through

this action, both my office and BME hoped that BME students could realize the student success benefits experienced by other students who study abroad, as supported by the CASSIE study. My position within the central USS administration gave me a platform to initiate and lead change in all areas of IE.

The BME program is unique to USS. Prompted by an in-house benchmark study that uncovered the achievement gaps experienced by African American men within the USS, this program has grown from a pilot program in 2002 to its current iteration, BME 2.0. As described in program materials, the BME creates targeted programs to increase graduation rates and degree completion through providing skills enrichment, mentoring, leadership development, and other student support services. BME 2.0 creates programming that aligns with its integrated program model (IPM), which includes the components shown in Figure 3.2.

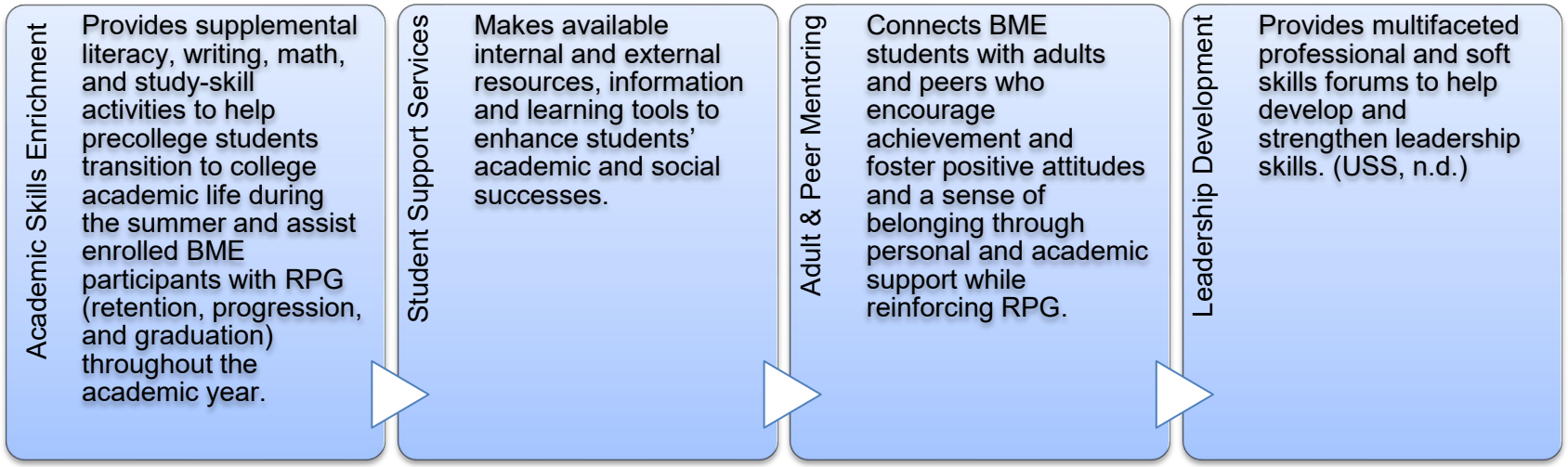

Figure 3.2. BME 2.0 Program Components.

Problem Framing

In 2018, when I proposed to the BME director that we collaborate on encouraging more students to study abroad, I was met with the same resistance I experienced on small campuses when discussing study abroad opportunities. The BME resistance, however, came more from a place of knowledge than bold resistance. Through further discussion, BME became more open and enthusiastic about a partnership. Subsequently, in 2019, we held a workshop matching BME directors with study abroad directors and/or advisors from each campus. We found that once BME leaders learned more information regarding the student success outcomes shown via the Georgia Learning Outcomes of Students Studying Abroad Research Initiative (GLOSSARI) and CASSIE projects and better understood our thoughtful and intentional approach to including their students, they became very open to finding ways to encourage BME students to participate in study abroad. Furthermore, a closer look at the national participation numbers (Table 3.3), combined with my experiences mentioned above, helped me realize that a significant barrier to African American student participation in study abroad that had yet to be studied closely was the effect of the advisors in both study abroad and BME on these students' perception of study abroad.

African American male participation levels in study abroad have historically been well below those of white students in the United States. While participation levels for these students have grown, they continue to remain low both nationally and within the USS, as exhibited in Tables 3.3 and 3.4. To identify the problem, I employed publicly available data from the *Open Doors* report and the USS-specific numbers used to comply with *Open Doors* reporting to compare the national and local problems. Although the USS exceeds the national trend for

African American student participation, we remain in lockstep nationally regarding gender participation (see Table 3.4).

Table 3.3

Combined National and USS Participation Percentages by Race/Ethnicity

Race/ethnicity	2014/15		2015/16		2016/17		2017/18		2018/19	
	National	USS	National	USS	National	USS	National	USS	National	USS
White	72.9	52.0	71.6	52.6	70.8	58.9	70.0	56.0	68.7	56.1
Hispanic or Latino	8.8	4.8	9.7	6.4	10.2	5.3	10.6	7.3	10.9	8.3
Asian, Native American or other Pacific Islander	8.1	5.6	8.4	7.2	8.2	7.1	8.4	9.3	8.9	9.4
Black or African American	5.6	10.6	5.9	10.7	6.1	6.8	6.1	10.6	6.4	11.6
Multiracial	4.1	1.9	3.9	2.1	4.3	2.8	4.4	3.1	4.7	3.4
American Indian or Alaska Native	0.5	0.2	0.5	0.2	0.4	0.1	0.5	0.2	0.4	0.3
Do not know		24.6		20.3		18.7		13.3		10.6

Table 3.4

Combined National and USS Participation Percentages by Gender

Gender	2014/15		2015/16		2016/17		2017/18		2018/19	
	National	USS	National	USS	National	USS	National	USS	National	USS
Women	66.6	63.4	66.5	65.9	67.3	66.3	67.0	66.3	67.3	66.5
Men	33.4	35.2	33.5	31.8	32.7	33.5	33.0	33.4	32.7	33.1

The data above provides interesting insight into the problem. Across the five recent *Open Doors* reports, white students have dominated study abroad participation, while African American student participation remains woefully behind, both nationally and within the USS. Notably, however, the USS far exceeds the national numbers in African American student participation in study abroad, although the data may be skewed as high numbers of unreported racial types (the *Do Not Know* category) are being reported by multiple institutions. It is likely that these institutions have not been capturing race as part of study abroad applications and thus do not have information on race and ethnicity readily available to them. Based on the numbers presented for the USS, and in comparison to how closely the gender numbers align with national trends, it is likely that white student participation rates could be even higher than currently reported when the *Do Not Know* category is factored in.

Societal Context

The context in which this study took place cannot be fully understood unless the societal factors that influenced much of the work are stated and understood. In March 2020, a global pandemic due to the COVID-19 virus shut down the world and changed how society operated (UN News, 2020), but it most certainly affected study abroad programs (Fischer, 2021). Further, in May 2020, the death of George Floyd, a Black man in Minneapolis, at the hands of a local police officer set off nationwide protests (*New York Times*, 2022). These two influential events profoundly affected the world, the United States, and study abroad. Study abroad professionals simultaneously dealt with the personal reflection on these two events and their unique professional experience of them. Those of us in study abroad worked seemingly around the clock to evacuate students from around the world, cancel upcoming programs, and then, in the

aftermath, watch countless colleagues lose their jobs due to layoffs. In reflecting on the context present when this study began, AR team member two (TM2) noted:

> *thinking about where I was, personally and professionally and mentally, at the beginning …of the pandemic [it was] more scary, at least than it is now…[I was] just wondering how this was all going to play out, in the lens of COVID. I was uncertain of how it was all going to be received. And if it was going to be received at all.*

Further, this pivotal time also "provided an opening for international educators to engage in a critical exploration of what interventions can be made to minimize the racism within our structures that deny students access to global learning opportunities" (Armstrong et al., 2021, p. 8). These feelings were still evident in March 2022, when a small intervention occurred in which participants met to discuss a book they had read as a group. The first few minutes of the meeting were spent acknowledging feelings of burnout and uncertainty about our jobs. Participants shared the following feelings with the group:

> *Worn down physically, mentally, emotionally, every way you can think*
>
> *If anyone ever asks in a job interview how do you handle uncertainty…well, I have a good answer for that. I've been doing that for the last couple of years.*
>
> *I am just hoping when this group comes back…if you are sending programs for spring or summer, when they come back it'll help excite me because I've been not excited at all.*
>
> *Even during pre-departure orientations I'm kinda like, well, hopefully, this works out.*
>
> *I'm glad to know we're all in it together, at least knowing in a weird way that we're all going through the same burnout hardships.*

There was also considerable discussion of our feelings about the structural racism that we saw within the administrations to which we were all connected:

> *that's not a priority for them, why should I be dedicating a lot of time to something that no one else is really going to value and probably cause problems. I might be called out or have some confrontation about this [and] might dedicate too much effort and time to it, so it's kind of trying to weigh all of these conflicting messages we're getting from the system office, from our own university, from our own supervisors, or, the internal struggles that we're having too. So, it's such a systematic problem, that not just one person can fix it...unfortunately, no matter how many interventions we do. Just start small…to have ripple effects. It is not going to be a wave of change ever, I don't think when it comes to this, and how race is viewed in America.*

These feelings from the study abroad community are an essential part of the study and serve as a lens through which much of the work was viewed.

Overview of AR Cycles

The outcomes found through this study resulted from the democratic and open nature of AR. As outlined in Chapter 2, AR was the methodology used for this study, which follows iterative cycles of constructing, planning, taking action, and evaluating action (Coghlan, 2019). The story of this AR study is told through its three cycles, which took place over 16 months and are presented here in chronological order to outline the exciting work and unexpected conflicts and issues that unfolded throughout the study.

Table 3.5

Summary of Action Research Cycles

Cycle	Dates	Interventions
Cycle 1		
Constructing	March 2021 – November 2021	Document collection; focus group; formation of AR team, conducted critical incident interviews (CIIs)
Planning for action	November 2021	AR team created a survey to be distributed to BME advisors, study abroad advisors, and study affairs professionals
Taking action	December 2021 – January 2022	Survey distribution
Evaluating action	February 2022	Evaluation of CII, focus group, and survey data collected
Cycle 2		
Constructing	March–May 2022	Based on data analysis refocused study to concentrate solely on study abroad advisors; conducted minor intervention; readjusted AR team
Planning for action	June–October 2022	Planned major interventions
Taking action	October–December 2022	Implemented major interventions
Evaluating action	December–January 2023	Evaluation of interventions
Cycle 3		
Constructing	January 2023	Analyzed data to determine new approach for final interventions
Planning for action	January–February 2023	Planned new intervention and added focus group meeting
Taking action	January–February 2023	Held final intervention and focus group
Evaluating action	March–April 2023	Final AR team meeting and AR team exit interviews; analyzed final interventions and scope of work to consider findings

As depicted in Table 3.5, there were three cycles in this AR study, but there is much more to the story than just how the cycles were implemented. Just as this study began within the context of change due to a worldwide pandemic and social upheaval, but with great expectations of what

can be accomplished through collaboration, the AR story also consists of hopeful moments contrasted by moments of conflict. Each cycle is told through the theme of change that a single stone can create.

Cycle 1 Story: The Stone

Cycle 1 of this AR study consisted of 9 months that were integral to defining the problem this study looked to address. Through data collection and analysis, the AR team examined uncharted waters and dropped a stone to see what effects might follow. The AR team was wholly unsure at the outset what the effects of the stone would be but endeavored to explore those effects together with a focus on creating perspective change. Cycle 1 is told through the AR cycles, as explained by Coghlan, which consist of constructing, planning, taking, and evaluating action (Coghlan, 2019, p. 9).

Cycle 1: Constructing

According to Coghlan, "the first step of the action research cycle is a dialogic activity in which the stakeholders of the project engage in constructing what the issues are" (Coghlan, 2019, p. 10). As a part of the constructing phase and as the first task of the study, I held a focus group to engage others in discussing the issue the study was poised to address. This focus group was a way to kick off the study with a group of people representing several areas of higher education. I invited the participants to attend the focus group to obtain their feedback on the study as well as to determine their interest in being a part of the AR team. Within the focus group meeting, some national and local data regarding participation rates in study abroad were included, highlighting the problem the group was there to discuss.

Focus Group Data

During the focus group meeting, I explained the identified problem of low participation rates of African American male students in study abroad, introduced my theory and research questions, and shared the national and USS data sets that highlighted the low participation rates of this group of students. I inquired from the group whether they felt the study would be useful and important, and they all immediately agreed and reacted with great interest. At the time of this focus group, the study centered on all influencers in higher education rather than just study abroad advisors. Throughout the course of cycle 1, that focus changed, and upon the start of cycle 2, the focus of the study narrowed and eventually centered on study abroad advisors. In some responses explaining why they felt that this study was worth undertaking, some members of the focus group offered self-assessments about their role in the problem, which was exciting because it meant that they were already engaged and reflecting. One member said:

> *I will be honest and say that as a student influencer myself, there are some times where I don't have a lot of efficacy that I will be able to convince students to do this. So, I just kind of self-eliminate and just say it doesn't seem worth talking about it with this particular group of students. There are very few [students] that I look at and say you might be a good candidate….so I think any type of study done on how student influencers can improve would be valid.*

Moreover, this group also made a judgment regarding study abroad and whether it was important enough to bring up to students:

> *I certainly do not promote [study abroad] holistically to all the students that I have access to because I felt like it might be wasted time. There may be more pertinent conversations that I would need to have with this population.*

Everyone's responses aligned with these statements, and the discussion generated ideas on how to improve student participation that the focus group believed were not influencer-driven. This part of the discussion led me to think that it might be necessary to ask the AR team to self-inventory their thoughts on what respective roles students and influencers play in decisions to study abroad, which became the first action taken once the AR team began to meet.

Another critical element in the constructing phase of cycle 1 was collecting data directly from one of the audiences with whom we wanted to work: the study abroad advisors. To better understand this group, I employed critical incident interviews (CIIs), which allowed me to explore significant incidents regarding interactions about study abroad participation with African American male students. Three interviews were conducted with advisors from three different schools within the USS.

Critical Incident Interviews

In all three interviews, the questions listed in Table 3.6 were asked.

Table 3.6

Critical Incident Interview Questions

CII question #	Question text
1	Think about a time when you were talking about study abroad with an African American male student and the student seemed really receptive. How did it go? How did it turn out? What was it about this example that made it seem significant? What conclusions did you draw from this incident?
2	Think about a time when you were talking about study abroad with an African American male student and the student seemed resistant. How did it go? How did it turn out? What was it about this example that made it seem significant? What conclusions did you draw from this incident?
3	Think about a time when you were talking about student abroad with a group of African American students. How did it go? How did it turn out? What was it about the example that made it seem significant? What conclusions did you draw from this incident?

CII question #	Question text
4	In light of what you have now talked about, is there anything else you would like to tell me (or think I should know) about this problem?

All three participants responded to a positive incident by pointing out how committed or passionate the student was about going abroad. In these instances, I noted that the student had likely decided to go abroad before speaking with the study abroad advisor. While a significant example was requested, these advisors chose these examples because they had been surprised by the high level of commitment and excitement exhibited by these students, whom they do not often encounter.

The three study abroad advisors interviewed were all white women. This demographic makes up the majority of study abroad advisors at USS institutions. While a discussion of the respondents' race and sex was not facilitated, it was brought up by two of the three respondents only when asked about speaking to a group of African American men. Both respondents spoke about how they do not feel confident in speaking to that population because they might not understand their concerns as they should. Sarah[4] said:

> *I'm not sure that, and this is just a personal opinion on that—would I feel comfortable giving a presentation to a group of African American male students? Yes, but I do not think that I would be prepared from a professional or personal standpoint to answer all of the questions that they may bring up*.

[4] Pseudonym

Marie[5] also expressed similar feelings: "*it is hard to describe because I wasn't uncomfortable per se, but I'm not a male student, I haven't studied abroad, so it's hard to be in their particular mindsets and how they feel and what they think*."

Such mentions notwithstanding, the discussion of race was mostly avoided. While my questions asked specifically about interactions with African American men, the respondents never attributed any positive or negative reactions to race. They spoke of financial need in general terms, and Marie spoke often about interactions with men but never attached race to issues. The last respondent was only able to give me one significant experience, which was a positive one. She never spoke of race as an identity that should be acknowledged or targeted in a specific way. Her lack of nonpositive examples could have been a way to protect herself from any suggestion of bias.

Finally, in closing the interviews, I asked all three respondents if there was anything else they would like to tell me or thought I should know about the problem. Only one, Sarah, whom I could tell had begun some critical reflection throughout our conversation, spoke to organizational issues that could be a barrier: "*I think we need more diversity in study abroad professionals. Like our offices, we have lovely people working here, but it's not very diverse, and so sometimes I think that hinders us*." Otherwise, the rest of her response to this question and those of the other two advisors addressed only how they were going to allow more elective credits or mentioned potential understaffing; they never attributed low participation rates from African American male students to how their offices work to recruit students, how materials are presented or how they could make better connections within their "world." Organizational structures were never questioned regarding non-white perceptions.

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[5] Pseudonym

The information collected in these interviews was shared and discussed with the AR team and was reviewed in detail at the end of cycle 1.

Cycle 1: Planning for Action

With the AR team formed and now meeting on a monthly basis but not yet evaluating the data sets already obtained, we felt it was necessary to establish a starting point regarding how the influencers we intended to study felt about their roles and study abroad. To do this, we set about creating a survey, which we initially planned to share with BME advisors and study abroad advisors but eventually also shared with student affairs professionals, since we felt that they also fell within our definition of an influencer. The draft survey items that I proposed elicited substantial discussions. In the discussion of these items, AR team members were adamant that many needed to be changed. In my researcher notes from January 11, 2022, I wrote the following:

> *One thing we did was go over the proposed survey questions, and some of them didn't like the questions because they were too "introspective." I think they are missing the point that we want to know how people truly feel and that it may require us to ask some uncomfortable questions.*

Table 3.7 compares the originally proposed survey items with those ultimately approved by the AR team.

Table 3.7

Survey Item Comparison

Item #	Original wording	AR team-revised wording
1	I am familiar with study abroad	I am familiar with study abroad
2	I understand study abroad	I understand study abroad
3	I feel comfortable talking to students about study abroad	I feel comfortable talking to students about study abroad
4	I understand why some students study abroad	I understand why some students study abroad
5	I feel that study abroad is not meant for all students	I feel that study abroad is not meant for all students
6	I feel that some groups of students are not interested in studying abroad	*I understand why some students study abroad*
7		*I feel that some students are more likely to study abroad than others*
8	A student's background influences how I may talk to them about study abroad	A student's background influences how I may talk to them about study abroad
9	I discourage students from pursuing study abroad if I believe it would lead to financial hardships for them	*I am concerned that participation in study abroad is not realistic for some students due to the costs involved*
10	I am concerned that some students would face discrimination on study abroad programs to certain locations	I am concerned that some students would face discrimination on study abroad programs to certain locations
11	I am concerned that some students will feel isolated during the trip if they participate in study abroad	I am concerned that some students will feel isolated during the trip if they participate in study abroad
12	I feel students will experience greater success if they participate in study abroad	I feel that students will experience greater success if they participate in study abroad
13	In my position at an institution of higher education I feel I have influence over students' decisions to study abroad	In my position at an institution of higher education, I feel that I have influence over students' decisions to study abroad
14	In my position at an institution of higher education I feel that I self-select which students might benefit from study abroad	In my position at an institution of higher education, I feel that I self-select which students might benefit from study abroad

Note. Italics indicate new items developed by the AR team after review of the initial items.

During the item review, the extensive discussion illustrated the various assumptions and biases about the problem and how members of the AR team wanted to try to steer the study.

When asked about how he felt about the survey items, TM4, who directs a campus BME program and is an African American male at a two-year college, initially said,

> *I would immediately start thinking about the study abroad program at my institution. And now I wouldn't necessarily think my first response would not be to think out of my own thought process. It would be to think about who's been heading the study abroad program and what interaction they have with the students I serve. And I will start to look at that as I was like, all right, I would answer it. But then I will still have my concerns on this particular study abroad person. Like if that person has shown no track record of interaction with African American [men]…I would get deterred in all honesty.*

This statement not only evidenced the bias and baggage that exists between the BME and the study abroad program on that campus but also highlighted a greater difference that may cross racial lines on many USS campuses, where many study abroad staff are white. TM3, who is a faculty member and coordinator of the BME program at a four-year school and has also led study abroad programs, was adamant that we should begin the survey by asking if the people completing it had traveled abroad before. There was much discussion on this point, and the team ultimately decided not to include it due to its exclusivity, which could further bias the survey and would not result in testing ideas on influence but could rather further divide the audience between those who had and had not traveled.

There was also extensive discussion around item 9 and the use of the word *discourage*. Again, TM4 said, "*as a faculty member, [if] I see, 'I discourage students', I'm going to immediately go to protect myself mode*." TM3 added to this later in the discussion:

> *Heck, no, I don't discourage students, no matter what. I mean, that's obviously one of the issues with any of these types of survey is you're asking people to analyze their own*

> *behavior themselves. Yeah, that's the whole point of this. Right? So it's going to be nuanced.*

This exchange was important and broadly representative of the whole conversation surrounding the survey. The AR team chose to move away from critical self-reflection and questioning their frames of reference. More work would need to be done to enter a stage of criticality. This work may have come too early in our team's formation. Viewing our group dynamics through Tuckman's (1965) small group development stages of *forming*, *storming*, *norming*, and *performing*, it is evident that our AR team was moving out of our forming stage and, through this work, quickly moving into storming. The storming stage "is characterized by conflict and polarization around interpersonal issues" (Tuckman, 1965, p. 396). These discussions hampered the group's functionality, and we found it difficult to agree on our purpose and the survey items.

There was also active discussion surrounding item 14. As TM4 stated,

> *'In my position, at an institution of higher education, I feel that I self-select'—that right there. As soon as I got to I self-select. That was another turnoff….because it makes it seem like I'm cherry-picking students. And even though we recognize that it is supposed to be an anonymous survey, there's always that unconsciousness that there still might be a leak of my information. And it's so sad[to admit if] I self-select which students might benefit from study abroad. I genuinely don't believe that you're going to get accurate data from that.*

TM3 agreed that the item should be changed, stating that "*I think just generally we tend to think of ourselves as good people*" and that people would not answer this item honestly. I informed the group that this item was derived from a direct quote by a BME advisor who had

participated in the focus group, after which the decision to use the item changed. TM3 continued, adding:

> *Because if part of this, part of what we're trying to figure out is how to transform the influencers' mindset and such, then that can be sort of inherent to the issue of, this is the problem…people don't think they're doing this.*

At this point, the concept of the study began to take hold for members, and we all agreed upon and finalized the survey.

Cycle 1: Taking Action

As the new year started, the survey we had worked hard to create was sent out, which was the action we hoped would help us narrow down our interventions. We also engaged in further action by working on our group dynamics. Based on how the discussions regarding the survey questions had proceeded, it appeared that our group needed to act to alter our own dynamics. Even though we had employed an ice breaker in our first AR team meeting, it felt like we needed to implement another one, this time a more personal one that would allow us to get to know each other more. The group was not working together very well, which TM2 confirmed:

> *I didn't know the other people on the team initially. And so you're just working out how to build rapport with people over Zoom. Initially, the first couple of months was a little weird just kind of feeling people out. What's okay to say? What's not okay to say? Is this going be too much if I asked this question, or…if we go there. So I did feel a little uncertainty and a little uncomfortability in those first couple of meetings, just kind of gauging the team and the general interest of the team.*

To help the group bond in the next meeting, I casually told the group about the job I had wanted when I was a little girl. Naturally, everyone began to share their professional dreams from

childhood and compared them to where they were now. We spent the first 15 minutes of our meeting on this activity, which helped everyone be more comfortable. For all future meetings, I made sure that we spent time conversing on topics unrelated to our project, which greatly benefitted the team dynamics. Only once we began to take action on our own group dynamics were we able to concentrate on how to progress our project.

Cycle 1: Evaluating Action

Coghlan (2019) noted that, in the evaluation stage of AR, "the outcomes of the actions, both intended and unintended, are examined with a view to seeing...if the original constructing fitted [and] what feeds into the next cycle of constructing, planning and action" (p. 11). In this stage, the AR team reviewed all the data we had collected, as shown in Table 3.8.

Table 3.8

Cycle 1 Data Evaluated

Data type	Content	Purpose
Documents	Study abroad participation rate data	Problem framing
Focus group	Pre-study discussion	Problem framing
Survey	Perceptions of influence and study abroad	Purpose framing and focus
Interviews	Critical incident interviews (CIIs)	Purpose framing

All of the data collected was discussed, but certainly, the most impactful data came from the CIIs, which acted as the "stone" that directed our project going forward.

The CII data review prompted instant reaction from the AR team members. The first to speak was TM1, who said, "*I don't think it's surprising*." She delved deeper into the responses

regarding participant discomfort, asking, "*Is it really that they don't know how to answer questions, or what's really there? What really has them uncomfortable?*" TM2, who identifies as a white woman study abroad advisor, spoke up, stating, "*I don't want to say they're not doing their job well, but they really aren't doing their job. If they're not thinking about this, and if they're afraid to maybe make a mistake, maybe say something wrong, take it as an opportunity to learn and make it like a teachable moment…for themselves*." TM5 helped the group to try to dissect this real issue:

> *I think I'd like to know a little bit more about the apprehension among current study abroad advisors in those conversations…Is it the conversations that happen at recruitment that they're concerned about? Is it the individual conversations or the group conversations? I think I'd like to know if it's that or if it's that they have concerns about the experiences that African American [men] might have abroad, and not being able to help them work through that…I think that might have implications for the types of interventions you do with the advisors…Right now there's just white women as the facilitators in the space of getting African American [men] to study abroad. They don't have the experiences as African American [men] to draw on, but are they able to find partners on campus to help facilitate that conversation or are they just kind of going it alone and trying to piece it together as they can?*

This idea of partnering our study abroad advisors with the BME community, as well as educating them on ways to rethink their approach, became our focus. Our study began to shift focus to the fears and bias that seem to exist in the study abroad community regarding engagement with African American men.

Survey Data Evaluation

By February, the survey developed by the AR team and sent out to all study abroad, BME, and student affairs professionals across the USS was closed, and we began to evaluate the results, which are shown in Table 3.9.

Table 3.9

Representative Responses to Study Abroad Influence Survey

Survey item	Study abroad advisors (*n* = 21)	Student affairs professionals (*n* = 23)	BME advisors (*n* = 13)	AR team (*n* = 4)
I feel that study abroad is not meant for all students	• True = 35% • False = 65%	• True = 41% • False = 59%	• True = 33% • False = 67%	• True = 50% • True = 50%
A student's background influences how I may talk to them about study abroad	• True = 80% • False = 20%	• True = 59% • False = 41%	• True = 75% • False = 25%	• True = 75% • False = 25%
In my position at an institution of higher education I feel that I self-select which students might benefit from study abroad	• True = 10% • False = 90%	• True = 18% • False = 82%	• True = 25% • False = 75%	• True = 25% • False = 75%

The AR team reviewed the responses from all four groups surveyed, but our evaluation of this data set, which was reviewed after the CII data, concentrated on the items highlighted in Table 3.9. We found that these items had not been well structured, and thus, we needed more information from respondents to understand their responses. In discussing the item *I feel that*

study abroad is not meant for all students, TM3 explained our issue with interpreting the responses:

> *You could have people who were answering that question from one perspective of the study abroad program and saying this program isn't for everyone, or you could be having someone answer that question from the student perspective and say, study abroad programs are not built to be inclusive, and so that response could have the same response, but for different reasons.*

We also discussed the item *A student's background influences how I may talk to them about study abroad* and how it aligned with another item, *In my position at an institution of higher education I feel that I self-select which students might benefit from study abroad*. We considered what we had already learned through the CIIs and realized that the response data from study abroad advisors showed that 80% stated that they considered a student's background when talking to them about study abroad. However, the data reflecting that only 10% self-selected with whom they discussed study abroad did not align with the data from the CIIs. We had learned from the CIIs that the advisors interviewed were not really engaging with groups outside the study abroad norm of white women. As TM1 surmised, "*I don't want to say maybe they were lying, it may be uncomfortable admitting that, but this was an anonymous survey, so it may be more telling, I don't know how much we want to dig into that*."

As we triangulated the data we had, focusing primarily on the national and local study abroad participation rate data, the CIIs, and the influence survey data, we came to view creating interventions targeted towards study abroad advisors and providing them with tools necessary to be more inclusive in their recruitment and advising practices as the new focus of our study. We were excited that the data had led us to explore what could be the real problem behind the low

study abroad participation rates for African American male students and looked forward to beginning cycle 2, which would be framed around interventions based on collaboration and inclusive practices.

Just after this meeting, we learned that the state legislature had submitted a request to the USS to provide information on universities' diversity, equity, and inclusion efforts. Initially, this appeared to be a threat to our study and the AR team's ability to enact interventions that could help with our identified problem. As TM2 stated, "*I'm not surprised that this is being asked about*." I asked the AR team about how a request like this could affect our work and also how they felt about the work we were about to embark on in cycle 2. TM2 responded:

> *While I appreciate that this [study] is being done from the USS, I think there is much more need to make an impactful difference around diversity, equity, inclusion, and belonging (also activism & advocacy). I think leadership (both at the USS and administration at campuses) should be providing more resources to these efforts and set the example for others in this work. So often with systemic issues such as this, it is seen more of "a box to check" but the change isn't meaningful or lasting which can be frustrating for those who deeply care about making positive change.*

Despite this new perceived obstacle, our team was ready to start on cycle 2 and send out ripples in all directions.

Cycle 2 Story: The Ripple

The story of cycle 2 is about the AR team's new focus, which shifted from encompassing all higher education influencers to a narrower focus on study abroad advisors. The second cycle also included a minor intervention as well as the planning and enacting of the major study interventions. If the idea of focusing a study based on perspective transformation regarding

inclusive practices in study abroad is viewed as the stone, cycle 2 represents the ripple effects made by that stone. This cycle was best summed up by TM2, who stated, "*I was really just hoping we would move the needle a little bit, or, set the ripple effect into motion…but I didn't realize how big of an impact it might have*."

Cycle 2: Constructing

In the constructing phase of cycle 2, the AR team set about refining our new focus on study abroad advisors. Mirroring the new focus of the AR team, TM5, whose background focused on student success outcomes, transitioned off the team and was replaced by a sixth team member (TM6), who was a study abroad advisor on a USS campus. Now the team was composed of three members representing study abroad (including myself), one member who worked with both BME and study abroad, and two others dedicated solely to BME. Based on the analysis of the CII data from cycle 1, we felt that it was important not only to change our focus but also to retain the collaboration with the BME program in enacting our planned change. The changes to the AR team made it even more representative of the work we wanted to pursue. Moreover, including more voices from study abroad on the committee relieved some pressure for TM2, who had begun to feel that she had to speak for all white women study abroad advisors:

> *So I did feel I had [a]sense of responsibility to speak for the whole field of International Education sometimes, which is a little like, trying to carry that weight. So I was really excited when [team member #6] decided to join, so that way she could share her perspective, and I felt a little bit more like it's not just me having to speak for the whole state here, because it did feel like that a little bit in the very beginning*

The team had a rough idea of the interventions we wanted to offer based on some brainstorming we had conducted late in cycle 1. In our brainstorming, we proposed that one major intervention

might need to be provided by an outside organization that was an expert in inclusivity issues in study abroad programs. We were hoping to partner with Diversity Abroad, a professional organization specializing in issues surrounding inclusiveness and equity in study abroad, to offer this content since none of us felt that we were experts in this area. Furthermore, we wanted the intervention to be impactful and accurately reflect the current inclusive advising landscape in study abroad. Doing this would cost money, so I requested end-of-year funding from the USS main office to provide this training. The team felt that asking for money from the USS to offer the training could be a "test" of commitment, but we were hopeful.

Pre-Intervention: Book Club

As the group began brainstorming and discussing our major interventions, a minor intervention was conducted with a select group of study abroad advisors, two of whom were also on the AR team. The idea for this intervention came from my attendance at the Diversity Abroad conference, where I learned about the book *Beyond Guilt Trips: Mindful Travel in an Unequal World* by Anu Taranth (2019). The book deals with discomfort, privilege, differences, and accountability regarding study abroad programs. I asked several study abroad advisors if they would be interested in reading this book and joining in a discussion about it, as well as allowing me to record the discussion for data to support the creation of interventions later in the year. I chose a sample that represented the norm of study abroad advisors, meaning those who identify as white women from a variety of institutions. Six advisors agreed to read the book and attend the discussion, although only four attended on the day of the discussion.

The unstructured interview was held over Zoom on March 30, 2022, and lasted for approximately two hours. The discussion was transcribed in Otter ai. The advisors involved in the discussion were quite enthusiastic about how the book made them feel, and each one

expressed instances of critical reflection elicited from reading the book. The discussion was coded and analyzed through the five coding categories discussed in Chapter 2. The frequency of codes and highlighted quotes are shown in Table 3.10.

Table 3.10

Pre-Intervention Book Club Discussion Themes

	N = 4 study abroad advisors	
Code	Frequency	Quotes
Attitude toward uncertainty	3	*gave me a lot of food for thought just thinking about my own previous experience as a study abroad student…and being with a diverse group of people and thinking back about those experiences that my peers on the programs have had...just thinking about what can I do better moving forward and , and how to better educate students as we proceed forward...what can we do to help those conversations continue onwards?*
Criticality	5	*they just like went up the road, to a school and just had a conversation with high schoolers literally in their same city and how that had such an impact on race and how they view themselves and their identities.*
Transformative outcomes	6	*One of the important things for me when I talk to my students about studying abroad is that thing that I cannot prepare you for, is what it is to be Black in the other country that they are looking to travel to. Because I'm not. But, I think as we talk about the need to be a catalyst for students of color to study abroad, those are things that we have to be mindful of, and things that we need to be ready to talk about*

This pre-intervention provided us with the idea that, once engaged, study abroad advisors were ready and eager to talk about better serving or interacting with diverse students when considering study abroad. This understanding helped us think more clearly about the major interventions we were planning.

Cycle 2: Planning and Taking Action

As the AR team began to plan the interventions that we felt would exert the greatest impact in educating study abroad advisors on inclusive practices, we learned that our request for funding for our largest intervention had been denied. While we were disappointed, we had known this was a possibility, so we moved forward with planning and endeavored to offer all the interventions ourselves using the resources and knowledge available across the USS. Offering the type of intervention that we envisioned would require all of us to learn information and implement actions in which we were not experts, but we were up to the challenge. This decision to operate all the interventions on our own cemented the team as a strong working group.

The AR team knew that our collaborative work could be easily translated across the USS, so we developed interventions that built upon the strengths of both BME and study abroad professionals. The interventions we developed created a progression of learning and reflection that would begin with a structured collaboration between BME and study abroad advisors, delve more deeply into inclusive advisor practices with study abroad advisors, and then culminate in a final workshop where both BME and study abroad advisors from across the USS would share newfound ideas or practices that they had developed from participating in the first two workshops. Once we had settled on this high-level intervention structure, TM3 stated that "*the arc or introduction of BME and study abroad, then moving to learn more about inclusive practices to the final sharing state [makes] so much sense*." We envisioned each intervention to allow further progression, akin to ripples across the water after a stone is dropped, which is represented by the visual depiction in Figure 3.3.

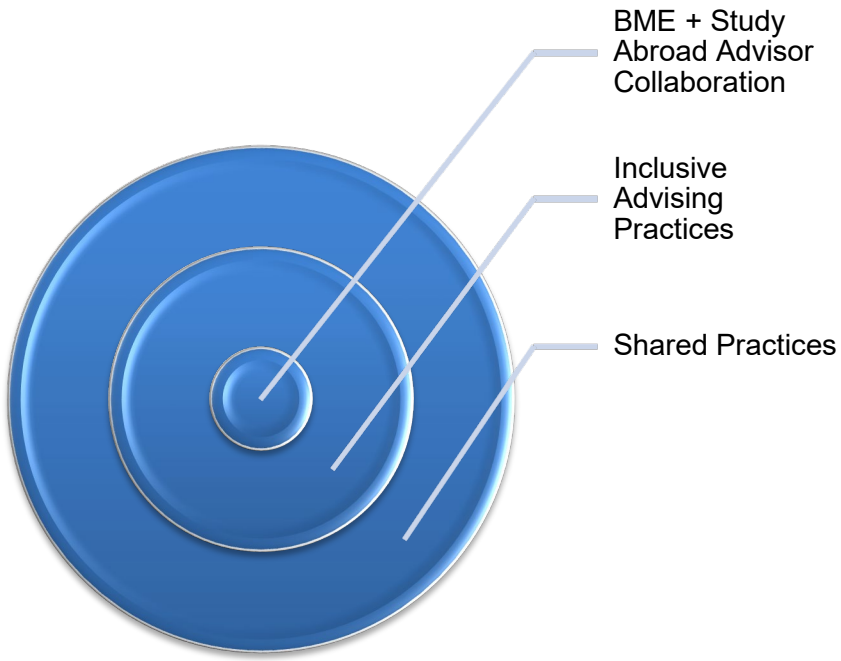


Figure 3.3. Progression of Planned Interventions.

Now that the big picture of how the interventions would work was decided, we set about planning each one. At this point, the AR team entered what Tuckman (1965) called the *norming stage*, where "ingroup feeling and cohesiveness develop" (p. 396). TM2 commented on how the dynamic changed during this stage: "*after a period of time, I'd say, the first three months, four months or so we started to kind of find ourselves and get in a groove where everyone did feel more comfortable sharing their ideas and their thoughts*."

Each member of the AR team took on a lead role for each of the first two interventions, with all of us serving as session reviewers for our final intervention. The original intervention plan developed by the team, along with anticipated outcomes and AR team member roles, is shown in Table 3.11.

Table 3.11

Original Intervention Plan

Proposed intervention	Justification & anticipated outcomes	AR team roles	Proposed timeline	Data to be collected for intervention evaluation
BME/study abroad meeting/ workshop	Transformative pedagogy (critical questioning and reflective discourse) Discuss current trends Create ideas around the shared vision of higher participation rates from BME students Create action plans for further collaboration	Plan and implement TM1: presentation on BME program TM2, TM6, & researcher: presentation on study abroad TM3, TM4, & TM6: discussion facilitators TM2: technical support	Oct./Nov. 2022	Post-meeting survey
Inclusive advising training for study abroad professionals	Reflection in- and on-action Discussion and skills presented to engage in critical self-reflection of possible bias in current practice	AR team agreement on need based on initial data collection TM2, TM3, & TM6: presentations TM3 & TM6: discussion facilitators TM2: technical support	Oct./Nov. 2022	Facilitated discussion after training with study abroad advisors who also attended the BME/study abroad workshop Discussions transcribed and coded Post-meeting survey

Proposed intervention	Justification & anticipated outcomes	AR team roles	Proposed timeline	Data to be collected for intervention evaluation
Shared Practices workshop	Post-action sharing presented by active BME/study abroad teams (who attended previous interventions)	AR team will serve as workshop proposal committee review members and attend workshops	Feb. 2023	Post-workshop survey and CII

The AR team met several times to plan and refine the interventions and were all excited to see how they would be received. TM4 spoke for all of us when he said that he was "*excited to see what ideas or issues that campus-based teams recognize and start to tackle*" as a result of the proposed interventions.

Between October and December 2022, interventions I & II were conducted. During these interventions, the AR team worked together seamlessly, and it was clear that we had entered Tuckman's (1965) *performing* stage. In this stage, "interpersonal structure becomes the tool of task activities. Roles become flexible and functional, and group energy is channeled into the task. Structural issues have been resolved, and structure can now become supportive of task performance" (Tuckman, 1965, p. 396). While we had planned each person's role in detail prior to each intervention, we found that on the day of each intervention, roles needed to be changed at the last minute, or an additional task was needed. Team members 2, 3, 4 and 6 were flexible and supportive of one another to ensure that everything was accomplished. The work dynamic was terrific, and I wrote the following in my researcher journal after the first intervention:

> *This AR team that began with some mistrust and misunderstanding of each other has evolved into a strong working group that relies on and supports each member of the*

team. I was so honored to introduce them as the workshop planning group and to be associated with this work. I am in awe of how well this collaboration is going. When we all have buy-in, such as with this group, anything is possible.

BME + Study Abroad Workshop

The BME + Study Abroad Workshop intervention was planned to facilitate a second meeting of these two groups. They had first met in 2019 through a collaboration initiated by the USS's IE office. That meeting had explained the CASSIE data and created a space for study abroad and BME advisors to meet. For many, this was their first time meeting, and in some cases, study abroad advisors did not know what the BME was or even that it existed. Many collaborations on campuses took place after this meeting, but in 2020, after the start of the pandemic, collaborations mostly ceased, and since then, there has been dramatic staff turnover. The concept for this meeting would allow for each group to meet, share information about their own program's work, and learn about the other's work. During a discussion period grouped by institutional sector, question prompts allowing for critical questioning were planned to take place. Brookfield (2005) emphasized the need when preparing critical questions to be specific, work from the particular to the general, and be conversational, which we set as our goal. Utilizing Brookfield's advice, the AR team created dialogue prompts for each group. After the discussion, we planned for the two groups, paired by institution, to work on a shared collaboration document through which everyone could plan future work together.

For this collaborative workshop, 37 participants registered, which allowed for pairings of BME + study abroad advisors from 12 USS campuses. Those attending without a partner from the other collaborative group were grouped together to allow for idea sharing and generation. Not every campus had a BME or study abroad program, and some had only one of these, but we

still encouraged these participants to think about other communities on their campuses with which they could interact to facilitate expanding access to study abroad. The agenda included presentations intended to educate the two participant groups about the work the others were doing. After this, we broke into groups based on USS institutional sectors: research, comprehensive, state universities, and state colleges. The AR team felt that discussion rooms centered on institution type, which may have similar resources and student populations, would be the most effective to facilitate discussion. The breakout rooms started with a brief icebreaker and then began guided discussion using the following prompts.

- How have the BME and study abroad programs on your campus collaborated before? How did it go? What are new ways to collaborate now?
- How are the current study abroad marketing strategies on our campuses working? How can we market to a broader audience?
- What can we learn from each other? What do the BME advisors recommend for study abroad advisors and vice versa?

Below are some highlights from the different discussion rooms:

- *[It] is very, very important that we include those types of conversations and also making sure that we, as an office or as even as a university, don't shy away from conversations about identity…we have to go to the step to…addressing certain topics and…make sure that our entire team is equipped to have these conversations because I know from a previous university the only diverse people were having those conversations, and they were pushed to use me because I was the only Black person on staff.*
- *I can only speak for some of the young men that I deal with…it's very important to understand that sometimes students don't even understand the concept of travel…some*

haven't even really traveled much outside of the state of Georgia and so then to even think that the idea of traveling abroad is an option…. I mean, something as simple as what does it mean to go outside of this country? The other consideration, and I think I won't say this is just a student thing. I think it's just natural for me being an African American male, is it safe, where I'm going…am I accepted there? And so it's a little deeper than just saying, Oh, this is a great opportunity for you to go and have these great experiences, because…[are] Black people even welcome in these countries?

- *I'm teaching a full load plus overload, you know, teaching 18 credit hours right now. And, you know, there's no longer any kind of a course release associated with [teaching study abroad]. There's no kind of stipend associated with it. But again, I think it's time to start evolving beyond that kind of mentality. And I'm excited. This certainly inspires me to really start something new. And I think we've got a lot of potential as an institution to do that. Well, I think as a team, we can find time together to work on it. As one person, it's kind of hard to get started with itself.*

After the discussions and a brief break, AR team members provided presentations that highlighted different types of study abroad programs that might be considered, such as virtual-based programs, and gave an example of a collaborative program conducted on one campus where BME and study abroad had worked together to create a unique program for BME students. Armed with knowledge and examples, we separated the participants into their campus pairs and asked them to complete a collaborative spreadsheet to record ideas on how they planned to collaborate after the program was over. We intentionally made this a Google Sheet that everyone could access so that everyone could see everyone else's ideas. Some entries are highlighted in Table 3.12.

Table 3.12

Example of Entries on Collaboration Spreadsheet

Ideas for collaboration	To-do list
Definitely getting returning students in contact with BME students	*Directors of both offices should meet (I believe this is happening in a few days)*
Involving the office of International Student Life into the collaboration	*Think of other partners and supporters like (International Student Life)*
Creating events to assist the interaction of international students at Big State U[6] *and BME students*	*Meet with those other partners and see how they could enrich this collaboration*
Encouraging the creation of more interdisciplinary faculty-led programs that will be open to BME students in different fields of study	
Attend BME student events, reach out to the students where they are, support them before asking them to do anything	
Considering collaboration with other institutions in a BME program that will bring students from different institutions to travel and study topics of interest to the BME community	

One participant commented later on how helpful the collaboration document was and that it had made a considerable impact on her perspective:

> *I think for me…I go back to that first session of having a Google doc and talking with Multicultural Affairs and seeing what everyone was doing and what everyone thought, I just found that really helpful…a way of just having the sharing of ideas*

At the conclusion of the workshop, participants were asked to complete the TROPOS (Cox, 2017, 2021) survey.

[6] Pseudonym

Inclusive Advising Workshop

The Inclusive Advising workshop was developed by the AR team after we learned that our funding request had been declined. Our original idea would have included an 8-week eLearning course and then engaged participants in targeted discussions led by Diversity Abroad. This new workshop was "home-grown," and we all took on roles to educate study abroad advisors on examples of inclusivity or how to generate new inclusive processes and perspectives. Despite our lack of funding, the executive director of Diversity Abroad agreed to be our keynote speaker at no cost, which was a massive incentive for participants to attend. We first shared the current USS data on study abroad participation by demographics, which was eye-opening for most attendees. After the data presentation and prior to the Diversity Abroad presentation on inclusive practices, we facilitated dialogue within randomly assigned breakout rooms with the following prompts:

- Why is inclusive advising for study abroad important?
- What would you like to learn about inclusive study abroad practices?
- What, if anything, would have to change for all students to be included in the vision of study abroad currently marketed on your campus?

In response to the second prompt, one study abroad advisor was very honest about their lack of knowledge on inclusive study abroad practices: "*I'd like to learn more about what are the barriers to certain populations of students not going abroad? I know one of the big ones is the financial component. But are there other reasons why different groups are not interested? I don't know*."

The AR team felt that it was important for the participants to reflect on the data we had presented to them as well as to begin considering individually what their current practices look

like. After this discussion, Diversity Abroad gave a presentation on inclusive practices, which was followed by presentations from two USS schools on how they approach inclusive ideas in study abroad advising. Following these presentations, we went back into the breakout rooms for a new discussion, led by the following prompts:

- What new things did you learn about inclusive advising practices?
- What new ideas surrounding making your advising practices more inclusive did you think of today?

The discussion that ensued from these prompts elicited feelings around being genuine as white advisors trying to recruit students of color, such as this statement by a participant:

> *So I also think about how to convince students that I'm genuine, especially when I'm talking to students that have different—with different experiences than me. I can't relate to certain student groups. So, I feel like when I'm trying to say, oh, study abroad is great—How do I convince them? How do I seem genuine? When I'm saying that, it's not like I'm trying to sell them a product. I genuinely want them to have this opportunity, and then they're looking at me like, oh, of course you think it's for this reason, XYZ so learning how to be genuine and relatable with experiences that I don't have myself.*

There was also discussion regarding how students of color may have been seen as a monolith on panels in the past, but one advisor realized that all students have different experiences and that students of color are not all the same, i.e., not merely “not white”:

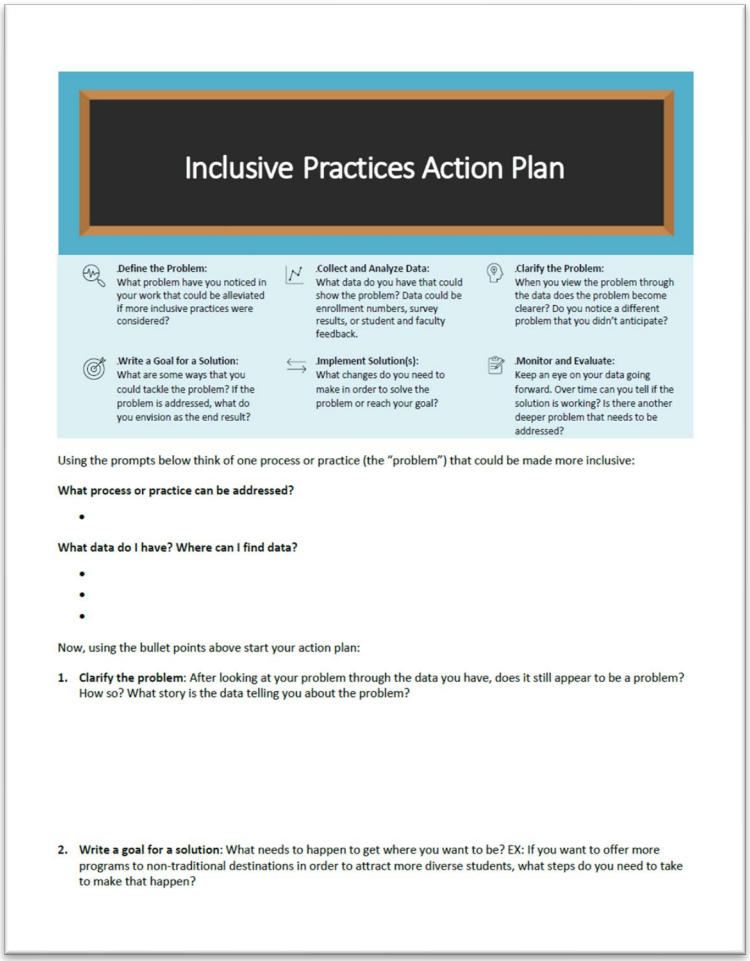
> *I think a lot of the times in the past, we've associated all POC students the same, and not the spectrum of BIPOC students that are on our campus. So Black, indigenous, and people of color. And all of those students have different experiences abroad. So I think, turning the corner of within the new post-COVID age of differentiating, that you may*

> *have a different experience abroad than, you know, the rest of the POC population, because it is different abroad for each different group. So I think just kind of including more voices to where it's not, oh, yes, here's our POC, diversity panel or different things like that. And there are no like Black people on the panel, for instance, or it's calling it a POC panel and there was no Hispanic Latino students on the panel.*

This idea was expanded upon by another participant:

> *we're talking to individuals along a spectrum, who…[of] surface level status and ethnicity. But they all have a personal story that we want to try to engage with, and that takes more work, right? It's not just that you can just label, a group and be like, okay, we're going to give you all these resources, and they should impact you that exact same way across the board. But, I think just even recognizing that upfront and making that part of how you advise students, that [in marketing] study abroad, it is more encouraging for students to hear that you're coming from that perspective.*

After this discussion, we challenged each participant to think of something on their campus to which they could apply inclusive practices. To facilitate this, we shared the Inclusive Practices Action Plan tool that we had created (see Figure 3.4).



Inclusive Practices Action Plan

Define the Problem: What problem have you noticed in your work that could be alleviated if more inclusive practices were considered?

Collect and Analyze Data: What data do you have that could show the problem? Data could be enrollment numbers, survey results, or student and faculty feedback.

Clarify the Problem: When you view the problem through the data does the problem become clearer? Do you notice a different problem that you didn't anticipate?

Write a Goal for a Solution: What are some ways that you could tackle the problem? If the problem is addressed, what do you envision as the end result?

Implement Solution(s): What changes do you need to make in order to solve the problem or reach your goal?

Monitor and Evaluate: Keep an eye on your data going forward. Over time can you tell if the solution is working? Is there another deeper problem that needs to be addressed?

Using the prompts below think of one process or practice (the "problem") that could be made more inclusive:

What process or practice can be addressed?

-

What data do I have? Where can I find data?

-
-
-

Now, using the bullet points above start your action plan:

1. **Clarify the problem**: After looking at your problem through the data you have, does it still appear to be a problem? How so? What story is the data telling you about the problem?

2. **Write a goal for a solution**: What needs to happen to get where you want to be? EX: If you want to offer more programs to non-traditional destinations in order to attract more diverse students, what steps do you need to take to make that happen?

3. **Implement solutions**: Enact the steps you came up with to tackle the problem and move towards a solution. How long with that take? Make a timeline. Who needs to be involved? Who can you partner with? Consider collaborations.

4. **Monitor and evaluate**: Pay attention to the steps you are taking toward the solution. Pivot when needed, always keeping your end goal in mind. Remind others when collaborating what the end goal is to test if the solution appears to be working. Review your work after some time to see if the solution was successful or if the problem is different than what you initially thought.

5. Start the cycle over again if a new issue is discovered.

Figure 3.4. Inclusive Practices Action Plan.

Cycle 2: Evaluating Action

Cycle 2 ended after the second intervention, as we found that our Shared Practices workshop (intervention III) had no registrations. We evaluated the work accomplished in the pre-intervention and interventions I and II to find a new path forward. We knew from the AR team's personal experiences that the first intervention had been successful, as all team members shared instances in which they were now collaborating with either their BME or study abroad counterpart and that others they had heard from appreciated the opportunity to collaborate. Reflection regarding the pre-intervention book club as well as the large Inclusive Advising workshop did not surface substantially until more in-depth interviews were conducted with the AR team at the end of the study.

We found that the survey instrument used, the TROPOS (Cox, 2017, 2021), was undoubtedly valuable in capturing different scales or points of perspective transformation, which is detailed extensively in Chapter 4. However, without the opportunity to provide written or verbal feedback, we felt unsure of how participants were really processing all that we had presented thus far. Since no one had submitted any presentations for our Shared Practices workshop, we could not "see" any of the results of our work. Cycle 2 ended with our need not only to observe the ripples created by the information we had shared but also to experience them through dialogue and connection. Reconfiguring our path forward is the story of cycle 3.

Cycle 3 Story: The Effect

In the third cycle of the study, we began to look more closely at the work we had accomplished in cycle 2, which marked the end of large group interventions. With the cancellation of intervention III, the group had to decide whether more interventions were warranted and, if so, what they would look like. At this point, the ripples of our efforts were

causing reflection on our campuses, and the effects were starting to take shape through transformed perspectives in inclusive advising in study abroad.

Cycle 3: Constructing

As cycle 3 began, the AR team was tasked with deciding whether the study should end or if a different intervention should be created to replace the failed Shared Practices workshop. We decided that one more cycle was needed to determine why the final workshop had failed to garner interest and what, if any, effects our work had initiated. Therefore, it was decided that the final cycle of the study would be based on (a) engaging study abroad advisors who had attended the first two workshops in reflection regarding what they had learned and (b) learning through dialogue what, if anything, they as a community would like to do going forward.

Cycle 3: Planning & Taking Action

For the final cycle, we planned two brief, small-scale interventions to engage study abroad advisors with what we had undertaken in the first two interventions, as outlined in Table 3.13.

Table 3.13

Cycle 3 Interventions

Proposed intervention	Justification & anticipated outcomes	AR team roles	Proposed timeline	Data to be collected for intervention evaluation
Focus group	Transformative pedagogy (critical questioning and reflective discourse)	Discuss questions and attend	Jan. 2023	Discussions transcribed and coded
Inclusive Advising Discussion & Sharing workshop	Reflection in- and on-action Action plan template	Attendance and review of discussion points	Feb. 2023	Discussions transcribed and coded

Focus Group

This intervention was created primarily to receive detailed feedback regarding perspective transformation progress based on aspects of the study thus far. Rather than approaching this as feedback on our AR project, we decided that the focus should be very clearly positioned to capture data for the study based on Mezirow's perspective transformation theory. Therefore, we invited a select group of study abroad advisors who had attended interventions I and II. The invitation read as follows:

> *I am a Doctoral student in the Learning, Leadership, and Organization Development (LLOD) program at the University of Georgia. I am researching aspects of study abroad participation and ways to enhance diversity.*

You are being invited to be in this research study because of your experience working with the USS study abroad programs. Participation is voluntary, and your decision will have no impact on your employment. My study is focused on the effect of introducing inclusive elements into study abroad programs to enhance diversity. Because of your attendance at the BME + Study Abroad Collaboration and the USS Inclusive Advising workshops, I would like to invite you to a small virtual focus group in order to collect data.

Please reply to this email if you agree to the interview. If you agree, I will contact you again to schedule the focus group.

As part of the focus group, I shared the conceptual model for the study and then asked specific questions about the interventions that participants had attended, as shown in Table 3.14.

Table 3.14

Focus Group Discussion Questions

Discussion question #	Question text
1	What would be an example from either workshop that made you re-think your practice to be more inclusive as it relates to study abroad? What made it stand out for you?
2	Please share how you may have explored new ways to consider your role, processes, or practices you oversee in study abroad since attending the workshops. What are examples of how you are exploring new ways to be inclusive?
3	When you think about inclusive advising for you personally, how do you now feel about your own practice? How do you feel about it in your professional role?

Discussion question #	Question text
4	What additional help or support would you like to have from the system office in order to engage in inclusive advising?
5	Anything else anyone wants to share?

In January 2023, the focus group was held. All invited advisors except one agreed to attend the focus group (n = 3). The discussion allowed reflection on the first two interventions, and the discussion questions generated responses that displayed transformative outcomes, such as this one shared by one participant:

> *I think previously, in my role, I was…concerned about the number…like getting people to travel. Now looking at it is like who's traveling and who's not traveling and who I cannot reach? So, I think [the interventions have] given me a broader perspective outside of just thinking, let's get the numbers, but how do we increase the diversity and be more inclusive in getting those numbers so that the experience is more meaningful.*

Inclusive Advising Discussion & Sharing

For the newly planned Inclusive Advising Discussion & Sharing intervention, we did not shy away from explaining that this new intervention had been created to take the place of the one that had received no presentation submissions. The message sent out to USS study abroad advisors read:

> *Due to a low rate of session submissions for the Shared Practices workshop planned for February 3, 2023, the workshop is being canceled. In place of the intended sharing of inclusive advising ideas and practices from USS institutions, I would still like to offer a space to allow anyone interested in sharing ideas through discussion and action planning. In place of the originally planned workshop, we will offer an open forum to*

discuss inclusive advising concepts and ideas or answer questions. In addition, if there is interest, attendees can receive assistance in working through the Action Plan Template shared at the Inclusive Advising workshop held on December 9, 2022.

Therefore, unlike the focus group, where we targeted a specific participant sample, this final intervention was an open call to anyone interested in attending. In this intervention, the following discussion questions were utilized:

- Who attended other workshops in the series?
- Share something from either of the workshops that stood out to you or made you rethink your practices or processes.
- What should be attended to by you, your institution or us as a system to continue the conversation around inclusive advising?
- What additional help or support would you like to have from the system office in order to engage in inclusive advising?
- Anything else you want to share?

After the discussion, we planned to work through the Inclusive Action Plan templates previously shared in the Inclusive Advising Practices workshop (intervention II) and then talk about creating a community of practice around our work together thus far.

Twelve participants attended, all study abroad advisors from across the USS. Some had attended the first two interventions, but some were attending without that background. We made it quite clear that this session reflected a pivot, as shown in Figure 3.5, from our initially planned intervention, the Shared Practices workshop, which we had intended to be a series of presentations from USS schools sharing what changes they may have made or endeavored to make in regards to creating more inclusive practices. Since no one had submitted any proposals

to the original workshop, this newly formatted workshop was meant to provide a place for reflection and sharing with a discussion about how to continue the conversation regarding inclusive practices in the future.

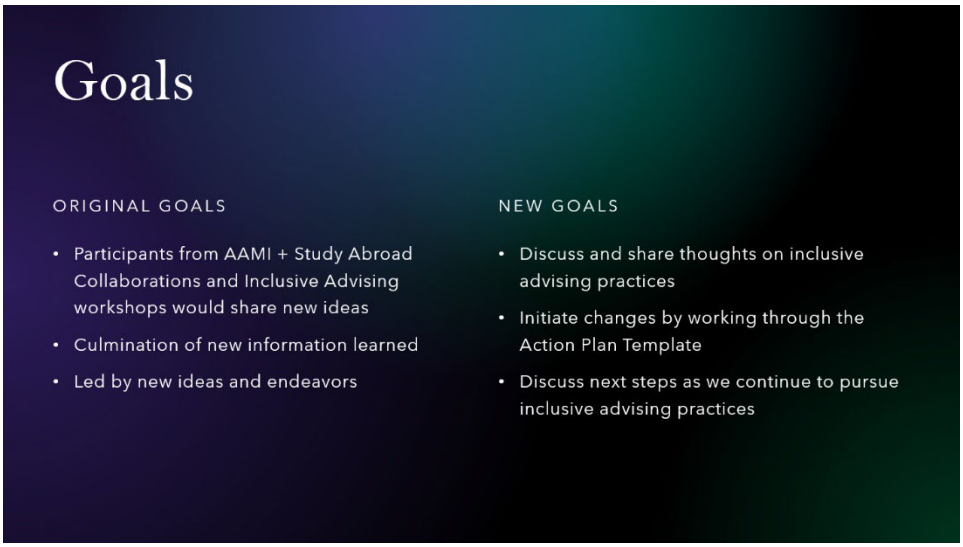


Figure 3.5. Inclusive Advising & Sharing Workshop Presentation Slides.

The engaging and comfortable conversation, led by the discussion questions, was very helpful in framing the work that the AR team had accomplished in our first two interventions, and we could see from the conversation that our work had impacted people. One participant who was attending for the first time stayed after the discussion was over to share with me that she had not been sure that she should be attending this workshop. I assured her that this was an open meeting that anyone could attend and that we welcomed all study abroad advisors to be a part of the conversation on inclusive advising practices. She represented one of the largest schools in the USS, which, despite a very large staff, had not participated in any of the other interventions. Some of her statements, provided in Figure 3.6, reflect a hesitancy to engage in these types of conversations without permission or direct encouragement from her supervisor.

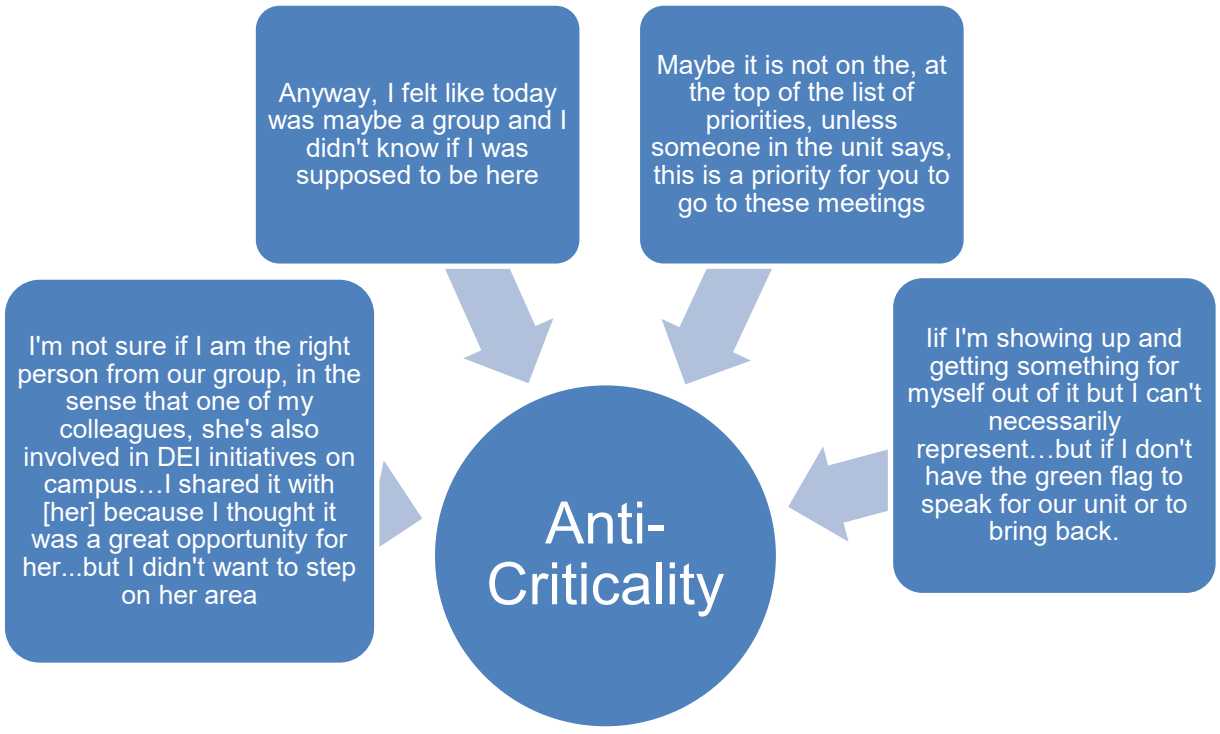


Figure 3.6. Anti-Criticality in Intervention III.

This conversation was interesting, as the notion that participants would require (or feel that they required) permission from the school and/or a supervisor to attend any of our interventions had never factored into our development of the interventions, since they were offered at the system level. I was anxious to share this conversation with the AR team and planned to do so in our final AR team meeting.

Cycle 3: Evaluating Action

In March 2023, we held our final AR team meeting. In preparation for the meeting, I put together as much data from the interventions as possible and also provided the group with an overview of our work together. In doing so, I realized that we had worked together as an AR team for 16 months. In retrospect, we all found this quite surprising as most of us had been very much engaged in our work, so the time flew by. Disappointingly, one AR team member did not attend the final meeting. The evaluation of the data presented and the work we had accomplished together came into better focus after this final AR meeting, when the individual team member exit interviews were held. Nevertheless, at this meeting, a few team members commented on what they had learned as a part of the AR team. Their comments were not about inclusive advising practices but rather about how the USS works as an extensive system and how that system had affected the changes we tried to initiate. TM3 commented:

> *[I] think about it as vertical and horizontal, the horizontal ecosystem is sort of the USS. So each of us are at institutions that have our own versions of student affairs, education abroad, whatever we call our diversity and inclusion offices, things like that, and the partnerships on our own campuses that we need to be making. I felt like a lot of the work that [we have] been doing has facilitated that, and this particular project facilitated the vertical…we've got the USS, we're reaching out to each other but also recognizing those*

> *partnerships on our own campus, as the gaps that are there…the fact the BME is a subpopulation that can be drawn from that connects to some of the things that education abroad may want to do diversity wise, but there are other populations like that on campuses…and traditionally those populations fall under the umbrella of traditionally underrepresented…and there is a unique program for them [that education abroad can connect with]…this project has made all of us think about that a little deeper, that's useful for us.*

All AR team members present were adamant that we did not want our work to come to an end simply because the study was ending. TM4 pointed out that "*traditionally, they've [study abroad and BME] been two separate entities all together and it's easy to fall back into that rut*." Therefore, we spent much of the meeting thinking about what the TROPOS (Cox, 2017, 2021) data and responses from the final focus group and Inclusive Advising & Sharing workshop could tell us, as we felt that there had been a genuine transformation of perspective among the study abroad advisors who had actively participated in the interventions.

In discussing the anti-criticality present in the one-on-one conversation I had had with an advisor after the last intervention, TM3 described a significant hurdle to our study—one that, in hindsight, I suppose we had been trying to overcome the whole time:

> *Your research runs up against the obstacle that many…run into, which is how do you get the people in the room that need to be in the room to have the conversations so that you're not just preaching to the choir…I think that willingness to continue creating opportunities increases the risks, they will accidentally show up. If you're willing to accept a failure rate, so to speak, and continue to do it, every once in a while, you'll catch a couple of people in there, for whatever they may have some other motive they had to*

attend ends up outweighing in their calculation, their defensive mechanism for not attending.

Although we were unable to overcome the obstacle described by TM3, we felt that our intended arc from intervention I to intervention III, even with the necessary changes to intervention III, had helped develop a transformation in those who had attended and engaged in our interventions. Represented in Figure 3.7, we felt that the collaborative spirit of intervention I, mixed with the exploration of new ideas surrounding inclusive advising practices in intervention II, along with the guided reflection in Intervention III, allowed such transformation to happen.

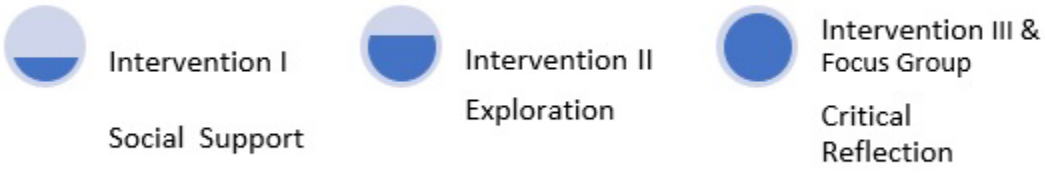


Figure 3.7. Progression Toward Perspective Transformation Facilitated by Interventions.

Conclusion and Current State

This study provided a new way to utilize Mezirow's (1994, 1997, 2000) theory on perspective transformation by engaging at the individual, group, and system levels within a large educational system. In the end, the pivot of intervention III and the addition of the final focus group, though not originally planned, were important components in providing a space for study abroad advisors to reflect individually and collaboratively on the first two interventions. Figure 3.8 depicts an alignment of what transpired during this study through the lens of our theme. As noted, participants and AR team members repeatedly asked that we continue our work, and we

have settled on the creation of a community of practice that will provide the social support needed to continue important conversations and maintain the community's intention to reevaluate practices and create new ones that are more inclusive.

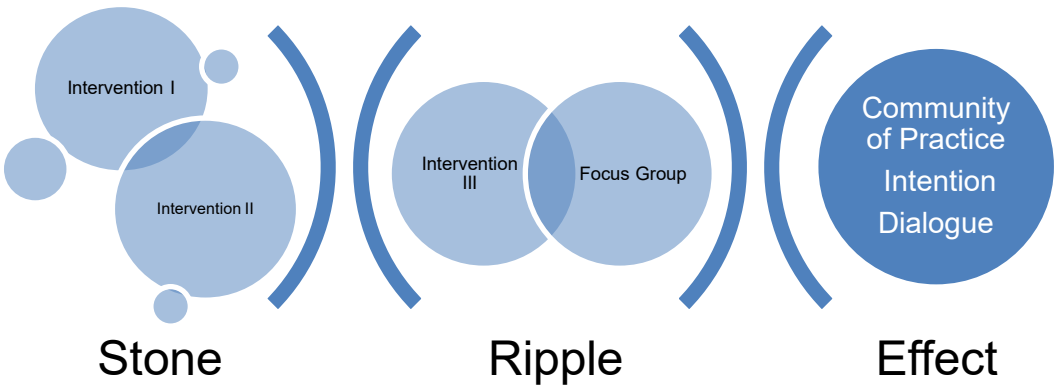


Figure 3.8. The Impact of Our Landing.

All of the data collected through the study was coded, as described in Chapter 2, and triangulated to determine the study's findings and conclusions, which are discussed in detail in Chapter 4.

CHAPTER 4

INSIGHTS AND ACTIONABLE KNOWLEDGE

Chapter 4 includes an overview of what was learned throughout the course of this study and shares insights and actionable knowledge regarding perspective transformation, action research (AR), and collaboration. Two research questions guided this research:

> *What is learned at the individual, group, and system levels that advances theory and practice in an AR project focused on perspective transformation?*
>
> *To what extent were transformative outcomes facilitated in interventions designed based on transformative pedagogies?*

This chapter discusses the findings in response to these research questions and shares insights and recommendations for further research.

Study Findings Overview

The findings shared in the following section provide a response to the two research questions that guided the study framed through the lens of Mezirow's (1991) theory of perspective transformation. Learning was realized at the individual, group, and system levels, which aligns with widely accepted insights regarding perspective transformation at the individual level but, notably, deviates from previous findings at the group and system levels. This study found that perspective change can be a shared or group experience. Moreover, when developed and experienced at a group level, nurturing and support are needed to facilitate "reintegration into one's life on the basis of conditions dictated by one's new perspective" (Mezirow, 1991, p. 169). Finally, this study found that the use of transformative pedagogies can assist or hinder

transformative outcomes, depending on the learning groups and social support provided within an intervention or learning environment. A summary of research findings is provided in Table 4.1.

Table 4.1

Research Findings

Research question	System level and findings themes	Findings
What is learned at the individual, group, and system levels that advances theory and practice in an AR project focused on perspective transformation?	**Individual** Personal change precedes system change; transformation takes time; discomfort and reflection inspire change; lack of engagement and reflection inhibit change	• Personal reflection on practices and being open to learning and change facilitated perspective transformation. • Once critical assessment and recognition happened, time was needed to move to later phases of action associated with perspective transformation. • Experiencing discomfort allowed for greater reflection and movement toward perspective transformation.
	Group Collaboration facilitated by AR is a key to transformation; diverse perspectives enhance learning.	• The democratic nature, iterative collaboration, and discourse innate to AR facilitated perspective transformation. • Engaging with stakeholders with similar goals but different perspectives enhanced group learning.
	System Change led at the system level through collaboration is most effective; system support can sustain change.	• Collaborative change led by the system level broke down silos and enhanced transformation. • Once a change was started, it had to be nurtured by the system supporting it to ensure continuance.
To what extent were transformative outcomes facilitated in interventions based on transformative pedagogies?	Learning groups and social support within groups can either assist or hinder transformative outcomes.	• Shared experiences in groups promoted transformative outcomes.

Research Question 1 Findings

This study utilized Mezirow's (1991) theory of perspective transformation through a project that worked to introduce inclusive advising practices among study abroad advisors in a large university system. The project aimed to seek insight into the low rates of African American men who study abroad within the University System of the South (USS) and nationally. Basing the study within a large system facilitated individual, group, and system learning research. This study gleaned insights regarding perspective transformation, the use of AR, and how social support within groups can affect perspective shifts. The following eight findings recount what was learned at the individual, group, and system levels in an AR project focused on perspective transformation.

Individual Learning

Finding 1: Personal Reflection on Practices and Being Open to Learning and Change Facilitated Perspective Transformation

A key finding at the individual level was that personal or self-reflection on practices facilitated perspective transformation. Mezirow (1997) described transformation as the result of "taking action on one's reflective insight" (p. 11), and this study affirmed that reflection is key to transformation. Moreover, one must be open to new learning to engage in personal reflection. The opposite of being open to learning is resistance, according to Mezirow (1994):

> We resist learning anything that does not comfortably fit our meaning structures, but we have a strong urgent need to understand the meaning of our experience so that, given the limitation of our meaning structure, we strive toward viewpoints which are more functional: more inclusive, discriminating and integrative of our experience. (p. 223)

After introducing participants across the USS to ways to collaborate with underserved groups such as the BME and providing inclusive advising practice models through interventions, we provided participants with avenues to engage in personal reflection on their practices. These opportunities for reflection were accomplished through several interventions, such as the book club, the Inclusive Advising Discussion & Sharing workshop, and the final focus group. One participant at the Inclusive Advising Discussion & Sharing workshop commented on how attending the first two workshops had allowed him to think more broadly about how to engage inclusively with students on his campus, which does not have a BME office but does have a large population of Hispanic students and has been designated as a Hispanic Serving Institution (HSI). He stated:

> *I remember one of the discussions; we said that because [my school] is an HSI, maybe that is something that I could sort of focus on…that was something that was kind of an aha moment for me, really thinking, well, how are we even doing that? What links to start with? Do we even track Latino Hispanic students going on study abroad?*

One participant in the book club engaged in personal reflection regarding her own identity and how that could be an important way to build belonging and connection with students:

> *The book got me thinking on a personal level in terms of advising. Should I be leveraging my own identity more than I do when I'm talking to students? Because I am technically half Asian, but here in America, I've never felt Asian enough in some cases, so it got me thinking if I should be using that in some way or using my own experience in some way to reach students.*

Finally, one of the book club participants talked about how engaging in self-reflection and reflection on practices can feel overwhelming, but, with more reflection, one may realize how one's own transformation on a topic can facilitate significant changes for others:

> *If you're looking for all the injustices, you are going to see injustices. If you're looking for positive experiences, you'll see positive experiences and then so trying to zoom out to see the systematic problems that are happening, because that gets overwhelming though, and so trying [not] to become overwhelmed...but actually zooming back in and thinking about the changes you can make, they might be small in your mind, but it could make a big difference in a student's life.*

These comments also echo my own experience in this study. I found that throughout the 16 months I spent working with the AR team, I engaged in constant personal reflection on the problem we were studying, the practices I had been institutionalizing from the system level, and how being open to learning about different ways to approach entrenched practices was crucial for me to see how easily a more inclusive environment could be created within study abroad.

Further, this study found that many participants made a choice at the individual level regarding their willingness to consider a new perspective. Regardless of the group dynamic, participants who engaged in self-reflection, as recounted in Finding 1, were open to new perspectives despite past experiences that served as hindrances or barriers. TM4, in his final interview, spoke about how his barriers affected his ability to engage prior to and during the early part of the study:

> *Prior to this study I had never been approached by study abroad, and it never crossed my mind to approach study abroad about any of that information. If I saw a flyer it had no interest in me to jump out to even refer the guys that I mentor to go check that out,*

> *because I could see no representation whatsoever…It was my own personal inexperience that was hindering…I was so focused and determined on helping these young men develop their qualities as professionals…I feel like I put all my own hindrances [on them]...so there were several obstacles outside of my inexperience about the nonworking relationship between the AAMI and study abroad.*

TM2 also spoke about personal barriers that she had to overcome in order to engage with our work fully and eventually experience a shift in her perspective:

> *I would say that my [parents aren't] the biggest proponent of ideas around this.…and so I'm not terribly close with them, but [it] would come up; what are you doing at work…what are these projects? I was obviously really excited…so I would share things with them. And they just don't get it. They don't, no matter how much I try to educate…I don't try to knock them on it. I try to educate them and be really strategic in how I talk to them about it, but it just does not sink in. They are from [a] really small town…just really, honestly racist.…So that was certainly a hinderance because I felt like I couldn't articulate with them about all that I was doing at work or different projects I was wanting to take on or be a part of this. So, I think that was hindering and that's more of a personal issue.*

In these instances, both members of the AR team had moments that started them along a path to perspective transformation, and did not allow these personal barriers to stop that progression, but that is not true for all participants in the study. During the Inclusive Advising & Discussion Sharing workshop, which is what replaced the originally planned third intervention, the following exchange took place:

Participant: *What would help me is a paid position or a stipend…a course release or a stipend, because I am maxed out right now of what I can do…our class sizes are increasing, they're taking away our overload pay*

Facilitator: *As our demographics in the state change, our student populations are going to change and so the way we've marketed and recruited for study abroad will have to change. So, it doesn't mean you're necessarily doing extra…the discussion around inclusive advising is rethinking how you do what you normally do in a way that reaches a different type of student. I hear you and understand you, but I think [we] are having different discussions. It's not about adding new things. It's about rethinking how you do it in order to reach different demographics.*

Participant: *That's a wish, that's totally impossible.*

In this exchange, this participant viewed the information being relayed through their own personal barrier, in this case, the feeling that it would be extra work to change how they approach advising students. A study by King (2004) that examined perspective transformation in adult educators considered what barriers may prevent transformation from taking place and found both external and internal barriers, such as "other people, conditions, and consequences in learners' lives" (p. 167). It was noted that questioning and reflecting involve an element of risk, which "also has an internal dimension" in that perspective transformation may be "too scary and they don't know what to do with it….It might be that they are not ready, they don't have a support system, or the [intervention] stops and the [the process] is not finished" (King, 2004, pp. 167–168).

One member of the AR team, TM1, was the only team member to assert at the end of our study that "*I don't think much has changed*." When asked what she felt had kept her perspective

from changing, she responded, "*what I see—reality*." She recounted how in 2016 she had been a working professional while also taking classes at Mountain State University,[7] and she had become interested in study abroad:

> *I went to the study abroad office, and number one, first thing I saw was the marketing material, because it's the first thing that's laid out. Then, the second was, whoever was maintaining the desk itself wasn't welcoming…so, I just didn't feel like this [was] something that they really want to see me become a part of.*

This interaction had occurred 6 years prior to this study, but it served as a personal barrier to engaging in the work we were pursuing.

Finding 2: Once Critical Assessment and Recognition Happened, Time Was Needed to Move to Later Phases of Action Associated With Perspective Transformation

A finding at the individual level that directly connected Mezirow's theory on perspective transformation with real-world activities was that attaining perspective transformation takes time. Rarely would one experience a "disorienting dilemma," be it singular or an accumulation of experiences, that would lead one to reflect and critique assumptions and emerge instantly transformed (Mezirow, 1994). In actuality, as Mezirow explains through his 10 phases of learning (Mezirow & Taylor, 2009), perspective transformation is a process that takes time. As TM2 described, her perspective became more inclusive regarding broader ideas around inclusivity throughout the 16-month study. Only after continued critical assessment and engaging in inclusive practice was her transformation able to become more profound and sustainable:

[7] Pseudonym

> *in my mind, at least initially, I was focusing more on diversity in terms of race and ethnicity for inclusive advising, [I] hadn't considered the importance of language. So…instead of having all of your materials in English, if you're Hispanic Serving Institution, you should probably have things translated into Spanish…for the families or people reading things on your website or print articles. So, I hadn't thought of it [at] that level, I guess. But then also more broadly, thinking about inclusive advising for folks with disabilities…non-traditional students, just a lot broader, not just based on skin color or religion, is how I've started to view it now.*

In her AR team member exit interview, TM2 reflected on the lack of interest in our originally conceived third intervention, suggesting that more time was needed for people to have processed and reflected on what they had learned and that perhaps in a few more months people would be ready to share:

> *give them the opportunity to then take the time now that it's been four or five months since [the interventions] to then incorporate those. So I'd love to see maybe over the summer or something like—did you have time to implement actions? I know, for workshop three, it was a little bit too soon I think for people really be effective in what they were working [on] without trying to rush through it. But I think now or definitely next fall, they'll have almost a solid year to get something going. And I think that would be exciting to see what people gleaned from it.*

TM3 explained that he needed our cumulative time together in order to assess and recognize a transformation in his thinking: "*You have facilitated conversations that otherwise would not have taken place…the accumulation of those conversations [made the difference] because even the best of us need to hear it a second or third time to be like here's the connection."*

Finding 3: Experiencing Discomfort Allowed for Greater Reflection and Movement Toward Perspective Transformation

For perspective transformation to transpire, a "disorienting dilemma" (Mezirow, 1991) usually occurs that causes one to begin critical assessment of beliefs or meaning schemes. Some experience traumatic dilemmas such as death or illness, but other events can be subtler. As Mezirow (1991) explained:

> A disorienting dilemma that begins the process of transformation also can result from an eye-opening discussion, book, poem, or painting…that contradicts our own previously accepted presuppositions. Any major challenge to an established perspective can result in transformation. These challenges are painful; they often call into question deeply held personal values and threaten our sense of self. (p. 168)

Throughout this study, many participants noted feeling uncomfortable, making them more likely to inspect those feelings and critically reflect on themselves. TM2 noted several times where information from surveys or discussions led to feelings of discomfort for her, but she was able to recognize in her final interview how those feelings had led her to a newfound perspective and actions:

> *I tried to lean into the uncomfortable…because I believe in those moments of uncertainty when you are a little uncomfortable it's going to lead to growth; you are going to learn from it. And it will be hopefully an impactful situation that you will be in…once you get past the hump of uncertainty or uncomfortability, that's really where learning will take place and where growth will take place. So yeah, it was definitely uncomfortable. But I think we got through it on the other side. And I think it's important that [we recognize] we have privilege as white women…the field is predominantly white women. But how we*

> *can elevate other people and help bring their voices to the table and make sure they're being heard and understood in a way that they feel comfortable and then belonging into the greater group, I think [that] is really critical.*

TM6 noted how some of our conversations had also made her uncomfortable, but she learned from and embraced those feelings and recognized the importance of facing the uncomfortable things head-on:

> *I was definitely challenged…having the conversations sometimes it can be uncomfortable, and, it's trying to get used to being uncomfortable about the conversations and know that it's okay to be uncomfortable...we can't always be in a happy place. I think that was challenging for me because I hate trying to rock the boat too much...especially when I am still learning and educating and growing myself, and I don't want others to feel that, oh, here's another white woman coming in.*

As TM6 critically assessed her own feelings, she also began to reflect on past experiences with her students, which she now considered differently:

> *a student told me…this large African American group of students in this European country and they were uncomfortable being stared at…and the program director didn't feel comfortable about race and identity and diversity in this country...and they didn't want to discuss this and…[now] that was a huge issue for me.*

This same AR team member (a white woman), in her exit interview, spoke about how she felt about TM4 (a Black male):

> *I remember the beginning…I just remember how, I don't want to use the word aggressive but…he just was very excitable or…very passionate about certain things in the beginning. I definitely understand he had other goals in mind, and those were definitely*

> *more important. But I feel like he became more comfortable to talk with or communicate with as…we went forward.*

The feelings expressed by TM6 could be viewed through multiple lenses. One could argue that, by the end of our study, she had experienced a perspective shift and no longer found TM4 "aggressive." Alternatively, it could be argued that TM4 had his own perspective shift and became more open to our work. I feel that both suggestions are true and were precipitated by the many uncomfortable and sometimes confrontational conversations in which the AR team engaged. In his exit interview, TM4 said that prior to this study, he had no thoughts on study abroad because he didn't feel represented, "*but now…I'm interested in the sharing of study abroad, with removing my limitations out of the way and actually sharing with them*."

Group Learning

Finding 4: The Democratic Nature, Iterative Collaboration, and Discourse Innate to AR Facilitated Perspective Transformation

Mezirow (1994) has reminded us that "most reflection takes place within the context of problem-solving" and that "we can also reflect on the process we are using to solve the problem…reflecting on the content and process of our problems is the way we change our minds" (p. 224). A key finding of this study was that the marriage of AR, which aims to create solutions and knowledge collaboratively with others, with the theory of perspective transformation formed a natural fit. In his final interview, TM3 spoke to the democratic nature of our work despite different members' positionality: "*I viewed us as a committee of equals, in that sense.*" Regarding my role duality as both the lead researcher and AR team member and an employee of the USS system office, he went on to state that despite such potential inequalities, we maintained a democratic nature to our work:

> *you were guiding a lot of our discussions because of your research questions. I think if we take you out of the equation, then either those questions aren't asked, or maybe they're not emphasized in the same way, or maybe the answers that are provided are deemed satisfactory. Whereas you were like, no, no, let's push a little bit further on that. So do I think it would be different? Yes. I don't think it would have been different because of your position, though.*

TM3 addressed how the iterative nature of AR may have facilitated perspective transformation, saying "*getting to interact with so many different people, both on our team, and then as we did our various focus groups…the sum total of the conversations was really important*." As we discussed our problem and ways to introduce inclusive advising practices with each cycle of our AR study, we created "accumulative results of related transformations in meaning schemes" (Mezirow, 1994, p. 224).

The discourse created through AR is intentional and, in this study, was prompted through interventions created by the AR team. The interventions facilitated an environment that invited the AR team and participants to engage in discourse and conversations that may not have been entered into otherwise. The AR study allowed TM6 to see how the team was able to create openings to perspective transformation simply through discourse:

> *I never had an opportunity to be a part of an action research committee or a team and getting a chance to see that we were actually able to facilitate conversations, put goals together, generate workshops, and have conversations about inclusive advising; I thought that was really exciting.*

The type of discourse created by the interventions was more substantive than usual for many, and TM2 noted that "*this is directed, you know, we're going to dig deeper together, it's not just a*

high-level, superficial, on-off conversation." These deeper, more substantive conversations were referenced by Mezirow (1994) as a "special kind of dialogue in which we focus on content…by examining evidence for and against competing viewpoints" (p. 225). TM6 expressed how this dialogue worked to create her own perspective shift towards engaging in deeper conversations with others:

> *I felt like we had really positive conversations. I didn't feel uncomfortable with the conversations we were having…making me more aware of other things that I previously hadn't thought about...we're all in the same field. Sometimes it is hard to bring up conversations...so I definitely think having the committee has made me more comfortable with talking to students and getting that understanding [on] how to converse with them...being more comfortable being able to talk with students; have that courage to bring these conversations up...being proactive and talk to them about their concerns.*

While the purpose of the study was to introduce inclusive advising concepts in order to grow study abroad opportunities for underserved students, for some members of the AR team, their perspective shifts were formulated due to AR itself. TM4 reiterated this characteristic throughout his final reflections on the AR process: "*I've never seen that cross collaboration at my own institution, ever*" and "*BME and study abroad would never have collaborated without this study*." Utilizing AR as a methodology was key to facilitating participants' perspective transformation on many levels.

Finding 5: Engaging with Stakeholders Sharing Similar Goals but Different Perspectives Enhanced Group Learning

While Mezirow's (1991, 1994) theory of perspective transformation focused on individuals, when applied to a group setting, a diversity of perspectives can enhance overall

learning. In the case of this study, BME and study abroad advisors were brought together through interventions and as part of an AR team hoping to explore how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. Uniting the voices of the BME and study abroad advisors made for powerful partnerships, which Franz (2002) noted "can enhance individual and organizational success through more effective problem-solving and improved adaptation to change," although she also noted that "Working in partnership is difficult and often requires learning for successful collaboration" (p. 2). Learning through partnerships of participants who held different perspectives at the outset of the study but shared a common goal proved to be a powerful link to group learning in this study. TM2 noted how powerful the partnership was: "*I learned everyone comes from different backgrounds and perspectives…I never had considered some of the factors that the BME folks brought up and, vice versa, I think*."

TM6 reiterated this feeling:

> *it was really wonderful to have different perspectives and get a different idea of what others are doing. I think it also gives us a bigger picture [of]…how do they perceive what we are doing…what they have to say…it is nice to hear a collective [conversation] but knowing it's a safe space, and everyone has some sort of buy-in about education abroad and BME… I've really loved this opportunity to get to connect with everyone and just learn more…it is hard to[try to] hear from others all the time, and so this was a really wonderful opportunity for that connection.*

TM2 further discussed how, in the book club intervention, learning was enhanced by bringing different people together:

> *I felt like it was an environment where everyone was okay, being vulnerable and sharing some insecurities and thoughts and reflections that they've had over the years trying to do this work or having never thought about it before even. Everyone came from different perspectives before doing the book club, but I just felt like it was a good group of…people wanting to learn and wanting to do better.*

TM3 reflected on how working with groups who shared his goal for the study but held different perspectives outside of the study created a personal perspective shift for him:

> *In my role as a BME coordinator, and understanding how my students might be advised, especially with regards to some of the weaknesses or obstacles that might occur in traditional academic advising…It's not enough for the students who I want to be participants to understand the program, but the [study abroad] advisors also have to understand it because they are the ones who are making the real connection between student interest and student participation...it's one thing for students to be like, I might want to do this, it's another thing for them to understand how they go about becoming a participant, so I would say I learned a ton in that respect.*

System Learning

Finding 6: Collaborative Change Led by the System Level Broke Down Silos and Enhanced Transformation

When a system leads a change initiative, it will be more successful if the approach is collaborative rather than directive. Involving stakeholders across departments that work collaboratively for the same goal can help people look outside their areas to work toward concerted change. This study looked to address the low study abroad participation rates for African American men within the USS. To do so, a partnership was first created at the system

level between the international education (IE) office and the BME program, which then set the tone for the study and interventions. TM1, the director of BME for the USS, agreed: "*You and I working on a USS level…that has helped a lot...it's important that we do the work here*." Prior to a small collaboration in 2019, our two units had never worked together. Creating an AR team of stakeholders from both units helped people break out of their silos and listen to another perspective, ultimately enhancing each person's road to transformation. TM4 felt the power of a system working together rather than staying within the bounds of his own department or institution:

> *Just listening to everyone else as the USS as a collective being a resource for each other, rather than having to figure out this map on our own at our individual institutions as silos. While we're trying to tear down personal silos, we created institutional silos with the USS where we should be utilizing each other as resources all around. So, that was one of the things that I learned from this whole process.*

He reflected on how important the collaboration of the IE office and the BME unit at the system level was for our work and for future work to take place on campuses: "y*ou work in this area, and I work in this area, there have been conversations from on high that we should be collaborating, but that didn't exist prior to this study, that was siloed space.*"

In a sense, leading the collaboration from the system perspective gave others permission to pursue work in other areas that they had not considered before. TM3 noted that this experience had changed the way he talks to his BME students about study abroad:

> *Being able to tell [my students] that the USG eyes that active component and pushing of study abroad locations that could be representative of what they look like and [are being] considerate of their ethnic culture…your culture is being considered more [is important].*

Change realized at the individual institutions due to the system-led collaboration involved continued consideration and collaboration between study abroad and BME units. TM3 developed a new perspective on how and why he should not create a study abroad program for BME students within a silo but instead use the relationship created through this partnership for future programs:

> *when I am thinking about putting together a study abroad program…I need to be thinking about who the players are, who are the constituents, who are the stakeholders, the advisors are a role that I need to remember. They are a character in this drama as well...I need to craft a message to the advisor so that the advisor can then speak on behalf of the program, so it adds a layer of communication that I need to be aware of.*

TM2 described how a permanent change on her campus has taken place regarding recruitment and partnership with her campus BME office:

> *the things that we were able to implement at Eastern State University[8] after the conversations, [which] we already hosted [was a] workshop. And we met specifically with BME students during one of the regularly scheduled meetings [where we were] able to talk with the [BME] guys and what they're interested in, and what they are wanting... Putting a voice to the data, I think, really was important for us to do and continue to do. We're not done…we are going to continue that every semester. So it's just exciting to keep that in mind, too, that, yeah, that is important. But these are students, these are people at the end of the day, and honestly, [this] could really change the whole trajectory of their lives if given the opportunity to take advantage of what we can provide through education abroad.*

[8] Pseudonym

One focus group participant noted how our interventions would affect her training of new staff. She shared that her new perspective on inclusive practices will now be passed along to each new staff member, which, over time, may become ingrained in their practices:

> *I think for my office…I am in a good place in that almost all of my advisors are new, even new to this role...so I think having these sessions and even being able to learn from them and then also put that into my training when I'm training them…I was really, thankful to have your sessions and learn more about inclusive advising. That way, I could, as I'm training them, talk to them about that.*

At the system level, which I represent in this study, I learned that working with multi-institutional groups or cross-collaborative groups when planning systemwide programs or events is instrumental to buy-in. In every final interview with the AR team, I always shared what I had learned, and one important aspect was the power of collaboration. While the USS is a large place that represents many aspects and perspectives, I can say that within my small piece of the USS, I will be permanently modeling this type of collaboration in all new efforts.

Finding 7: Once Change Was Started, it Had to Be Nurtured by the System Supporting it to Ensure Continuance

In their study on transformative learning in an organizational context, Yorks and Marsick (2000) noted that sustained change "was most likely to occur with the continuous support of others. Participants who were isolated from other participants upon completion of the program were less likely to exhibit changes in behavior" (p. 263). While not much time has passed since the end of this study, participants have continually asked that the system continue to provide support around the topic of inclusive advising practices to ensure continuance. One focus group

participant noted all that she had learned during the interventions but voiced concerns about implementing new ideas without sustained support:

> *I think the workshops are helpful, but you know, ultimately, the work is on our end, and so I think continuing to keep it at the forefront so that it's not just an initiative that you don't hear anything else about it, so I think continuing the workshops and checking-in [would be helpful]. Sometimes it's like you don't know what kind of help or support you need until you start really getting into it.*

In the final AR team meeting, TM4 reiterated this view and insisted that the system should announce new meetings and workshops to sustain the work:

> *[Announce that] we are going to reconvene…to see what you all have done together…are we working to move forward? They are more apt to reach out to each other [knowing] that the USS is still checking in on this and wanting this to come to fruition.*

In the final intervention (Inclusive Advising Discussion & Sharing workshop) and in the focus group, the call for creating a community of practice was heard. Communities of practice are “collaborative, informal networks that support professional practitioners in their efforts to develop shared understandings and engage in work-relevant knowledge building" (Hara, 2009, p. 3). One focus group participant suggested the type of work this community could undertake:

> *sharing how we're putting inclusive advising into practice…share what changes we have made, or if we can share from various institutions, how we're seeing a difference in underrepresented students come to study abroad, or even participate in various international education activities across the campus. So, just sharing the results of how we took what we learned from these workshop sessions.*

The new perspectives developed by study abroad advisors around inclusive advising brought many into unchartered territory. Many participants felt that they understood what needed to change but did not possess all the tools they needed to create such change. This call for the creation of a community of practice could be our participants landing in the phase Mezirow (1991) referred to as *building of confidence*, in which they are actively working to build new experiences and understand their new perspectives. Moreover, in this case, they want to continue such work as a community.

Research Question 2 Findings

Finding 8: Shared Experiences in Groups Promoted Transformative Outcomes

During this study, the Transformative Outcomes and Processes Scale (TROPOS) (Cox, 2017, 2021) was used to measure transformative outcomes quantitatively. The TROPOS was used only with interventions I and II, but the data collected provided considerable insight into how group dynamics affected perspective transformation. The TROPOS questions were administered through Qualtrics and sent to participants via a link embedded in an email within 24 hours after the intervention. Information regarding the participants attending the interventions is outlined in Table 4.2 below.

Table 4.2

Registrant Data for Study Interventions

	Intervention I	Intervention II
Registrants	37	38
Group affiliation		
Black Male Enterprise (BME)(some marked both options)	16 (43.24%)	4 (10.26%)
Study abroad (some marked both options)	23 (62.16%)	32 (82.05%)
Other	0	5 (12.82%)
% overlap of participant registration	0.40%	0.39%

	Intervention I	Intervention II
Number of complete responses to TROPOS	13 (35%)	8 (21%)
Gender		
Men (TROPOS only)	6	1
Women (TROPOS only)	7	7
Race/ethnicity		
White or Caucasian	7	5
Black or African American	6	2
Asian	0	0
Native Hawaiian or other Pacific Islander	0	0
Other	0	1
Prefer not to say	0	0

There was little overlap between registered participants in the two interventions. Due to the small percentage of participation overlap (0.40% and 0.39%, respectively, for interventions I and II), they are assessed herein as two different groups and two different interventions. While transformative pedagogies guided discussion and reflection among facilitators and participants in both interventions, the outcomes differed. The two interventions were similar only in format, such as educating the participants by sharing information and data, presentations regarding groups or inclusive ideas, and structured dialogue in breakout rooms led by peers. A low completion rate for the TROPOS (Cox, 2017, 2021) was noted, especially in intervention II. For both interventions, two requests to complete the TROPOS were sent to participants by the researcher via email. A comparison of the collected responses with the mean response rate for each intervention was calculated. The difference in the mean for individual questions was reviewed by intervention. The difference in these rates is more easily viewed through which TROPOS subscale category ranked higher in either intervention, as demonstrated in Figure 4.1.

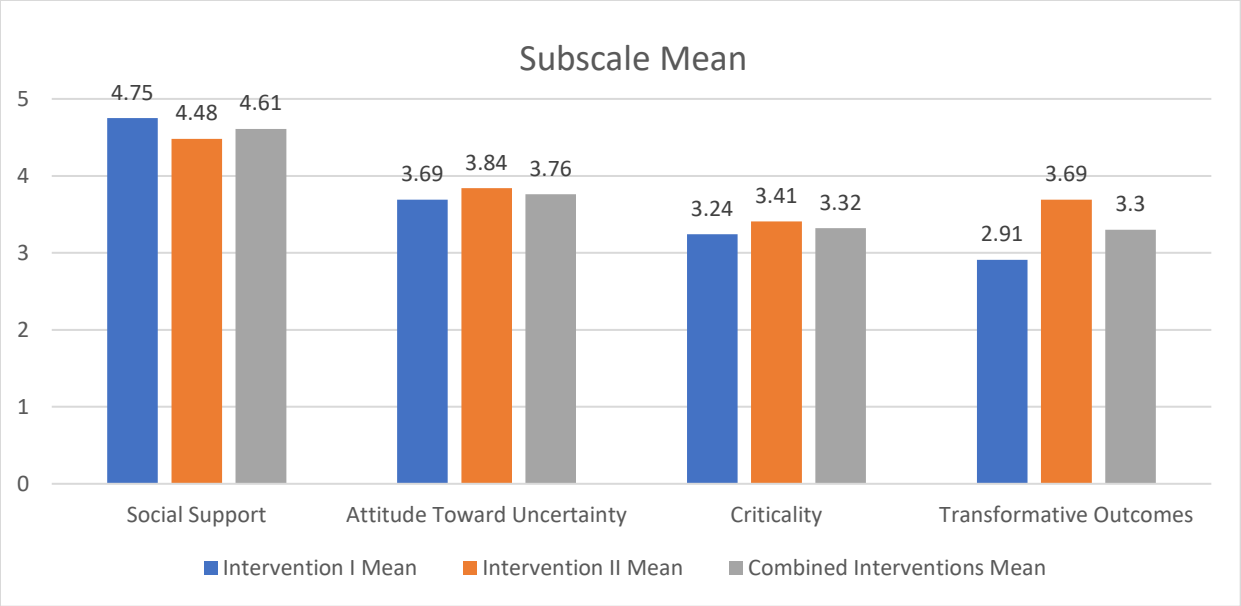


Figure 4.1. Subscale Means for Study Interventions.

In intervention I, the mean for individual questions was the highest in the subscale category of *social support*. The individual questions recording the subscales of *attitude toward uncertainty* and *criticality* were evenly ranked. Only one question measuring transformative outcomes had a mean higher than any question measuring the same subscale for intervention II: Q28, "I changed my goals for the future." The mean in intervention I was 3.46 and in intervention II was 3.00. In intervention II, the mean for question responses was markedly different, with the mean ranking higher for *transformative outcomes* in six questions (Q26–Q32; mean shown in Figure 4.2). Finally, only two questions with a mean ranking higher than in intervention I for *social support* were recorded. A review of the mean for each question is demonstrated in Figure 4.2 and compared by subscale mean in Figure 4.3.

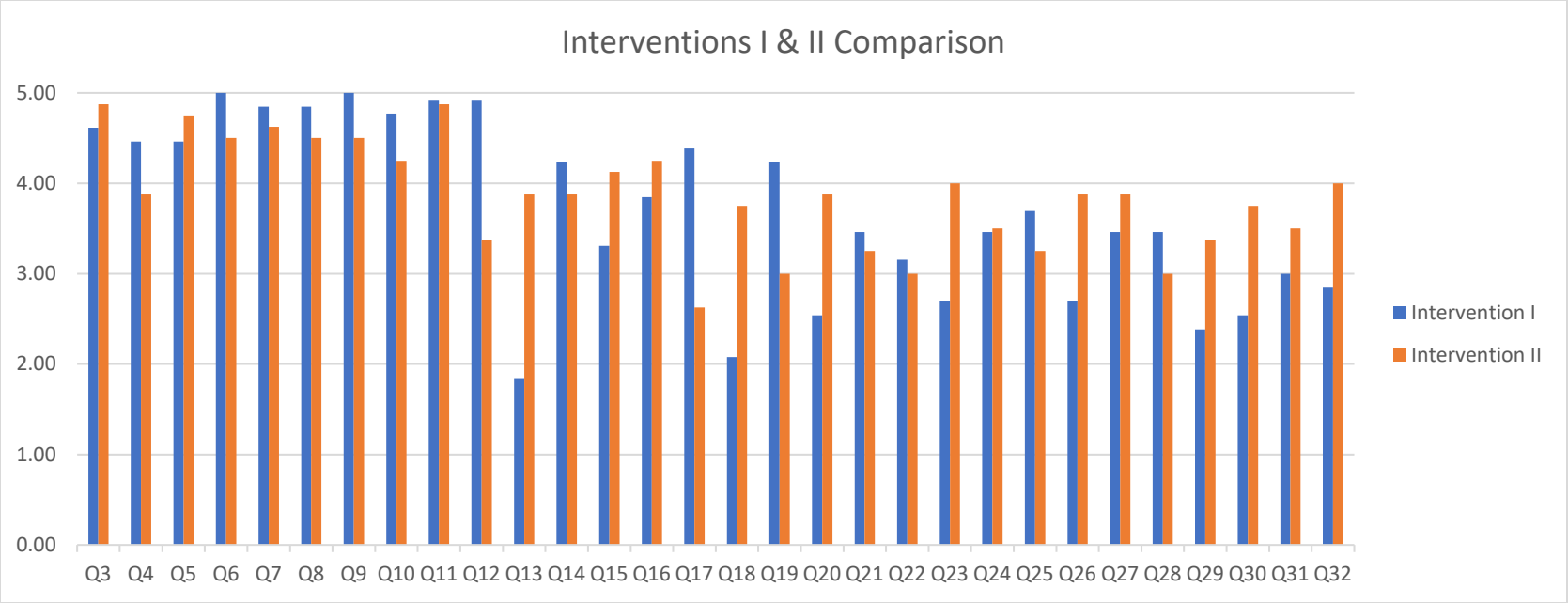


Figure 4.2. Individual TROPOS Question Mean Comparisons in Study Interventions.

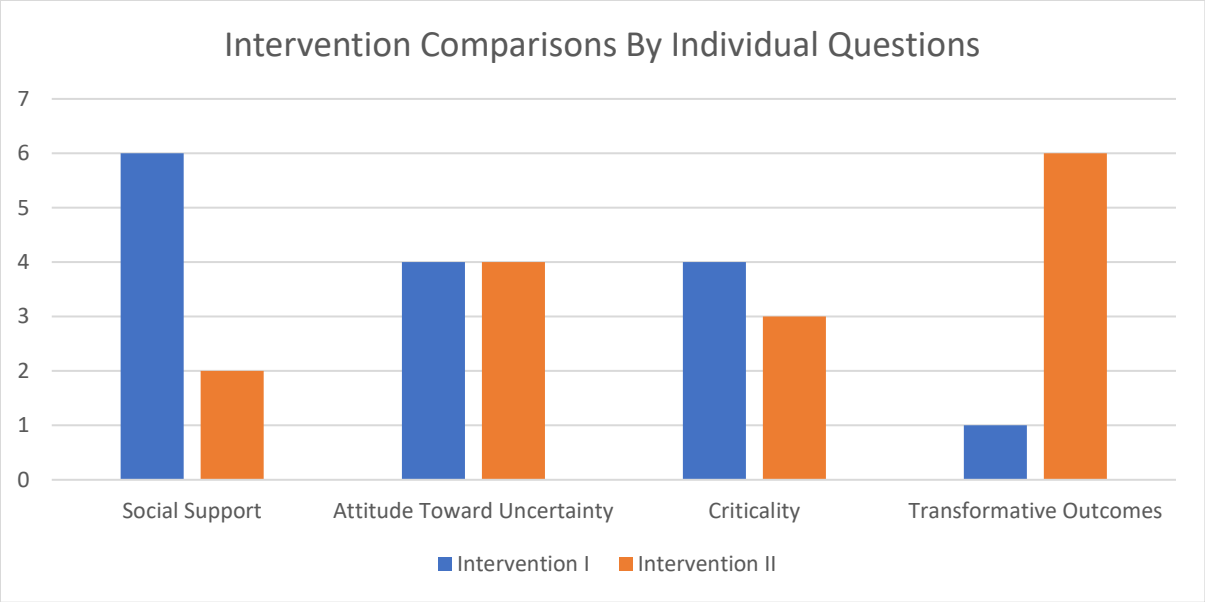


Figure 4.3. Individual TROPOS Question Subscale Mean Comparisons in Study Interventions.

Criticality was ranked as the lowest of all subscales in both individual question responses and when comparing the mean of each subscale. Cox (2017) found when conducting the benchmark study to create the TROPOS that with a limited sample size ($N = 12$), "social support may dampen criticality, but criticality demonstrated no relation with transformative outcomes" (p. 62). Further, Cox (2017) explains that a "learner's attitude toward uncertainty may play an important role in transformative learning [and]…it is possible students with an increased willingness to consider new/surprising experiences…may be more susceptible to experiencing transformative learning" (p. 62).

Outcomes Based on Gender

A gender-based analysis was also performed, the results of which are shown in Figure 4.4. Cox (2021) found that "females reported, overall, lower *criticality* scores than males, [but] females also exhibited higher correspondence between *criticality* and *transformative outcomes*" (p. 391). Further, Cox (2021) found that "females demonstrated much greater correspondence

between *attitude toward uncertainty* and *transformative outcomes*…than did males" but noted that, overall, "critical reflection as a process should be understood in relation to other processes" (p. 391). This was the case in this study as well.

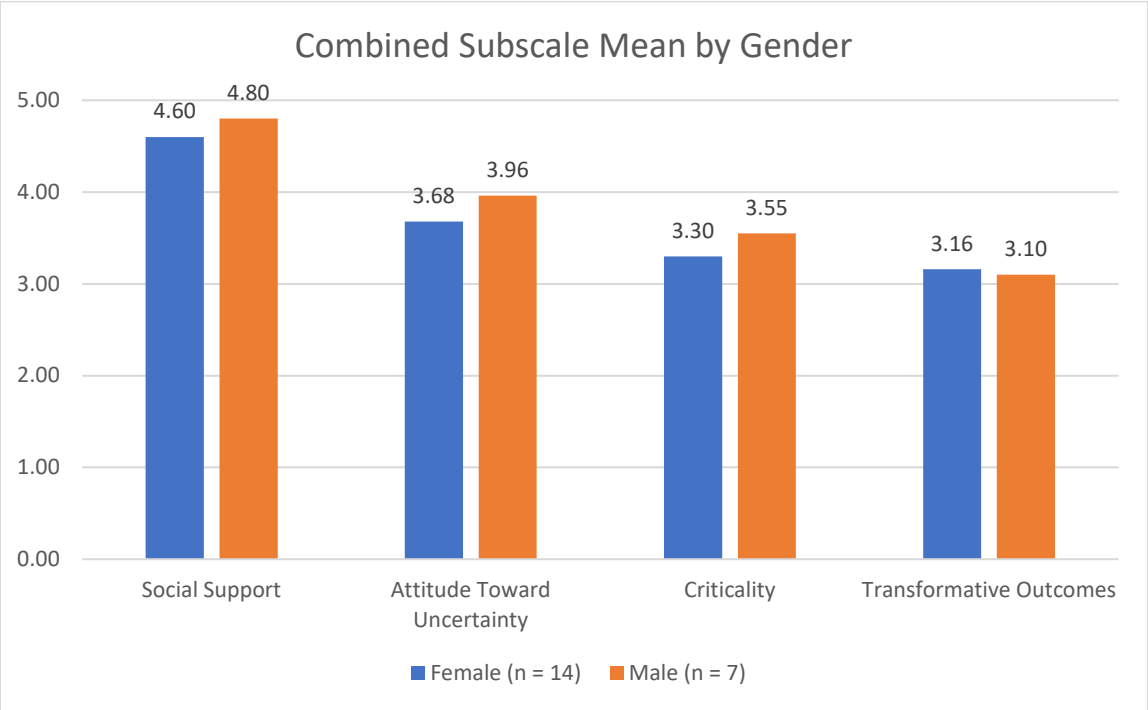


Figure 4.4. TROPOS Subscale Mean Comparisons by Gender in Study Interventions.

Outcomes Based on Race

Due to the nature of this study, the subscale means were also compared by race. While more responses were received from white or Caucasian participants (n = 12), in a direct comparison with Black or African American respondents (n = 9), the data demonstrated different trends, as shown in Figure 4.5. Cox (2017, 2021) did not analyze the TROPOS instrument based on race. Still, based on the data captured in this study, although *social support* ranked highly, *transformative outcomes* were ranked the lowest for Black respondents. In this case, the

interventions may have confirmed meaning for Black or African American participants, but the transformative pedagogies exerted a more significant impact on the white or Caucasian participants.

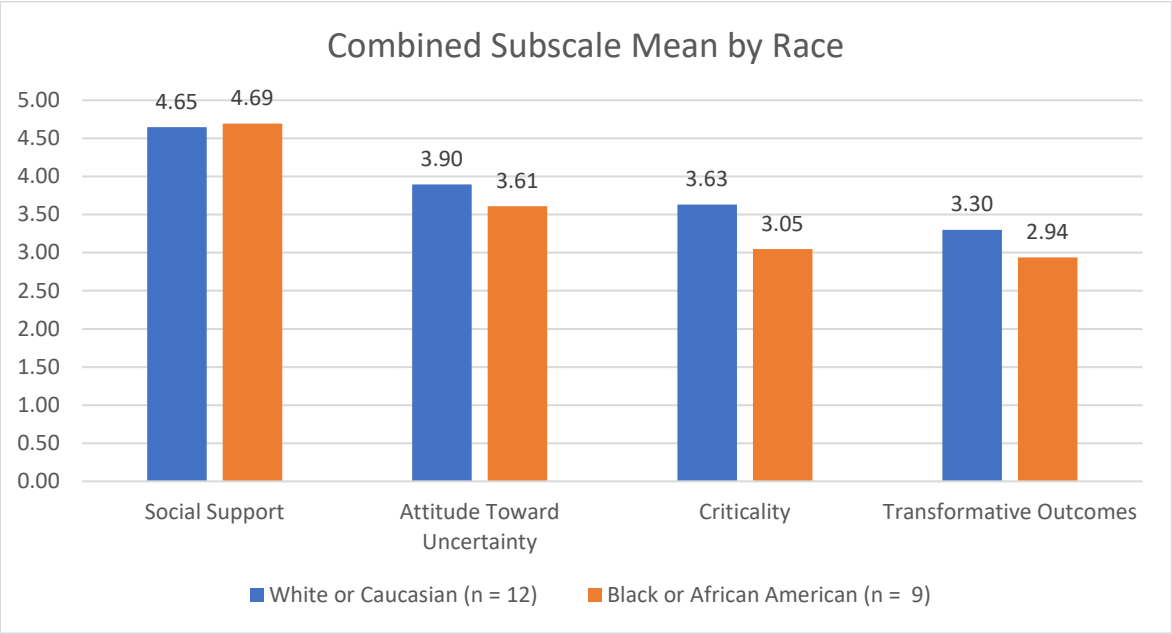


Figure 4.5. TROPOS Subscale Mean Comparisons by Race in Study Interventions.

TROPOS Use Comparison

The mean of each subscale for interventions I and II was calculated and compared to two other studies that utilized the TROPOS (Cox, 2017, 2021). As shown in Table 4.3 below, the mean of both interventions were similar to those presented by Cox (2017, 2021). In one additional study by Veishene and Dsouza (2022), new teaching methods were introduced to one group of teachers, and the TROPOS was utilized; the mean of teachers exposed to new teaching methods was then compared to those taught traditional ones. As Veishene and Dsouza (2022)

reported, the teachers exposed to new teaching methods exhibited higher mean scores in each subscale than the compared group.

Table 4.3

TROPOS Mean Comparisons to Other Studies

Subscales	Combined interventions mean (n = 22)	TROPOS analysis 3 (n = 114)	Veishene & Dsouza (2022) (n = 32)
Social support	4.61	4.44	4.06
Attitude toward uncertainty	3.76	3.59	2.94
Criticality	3.32	3.59	3.95
Transformative outcomes	3.30	3.47	3.28

Social support was rated highly in all three studies: the benchmark TROPOS study (Cox, 2017), this study, and the Veishene and Dsouza (2022) study. In a direct comparison between this study and Veishene and Dsouza (2022), it should be noted that while the *attitude towards uncertainly* and *criticality* subscales means were quite different, the *transformative outcomes* means were similar, as shown in Figure 4.6.

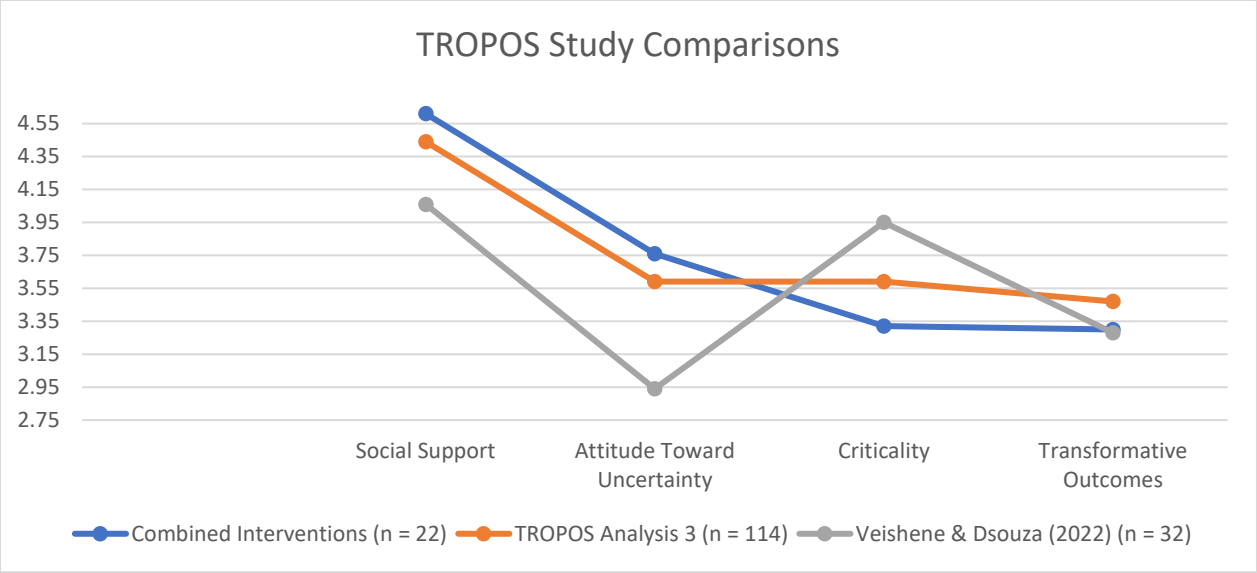


Figure 4.6. TROPOS Mean Comparisons to Other Studies.

When analyzing the TROPOS, Cox (2017) noted a potential overlap between *attitude towards uncertainty* and *criticality* and surmised that "any correlation between subscales does not indicate whether one subscale causally precedes another; rather, a correlation only describes whether subscale scores move positively, negatively or without relation to one another and at what rate" (p. 93-94). In this regard, understanding the movement process or assessment of *transformative outcomes* may best be viewed through a larger lens. The "TROPOS may serve as one of many tools in a broader, holistic discussion of program assessment and improvement, particularly when… paired with a qualitative component to help educators become more aware of the subtle, yet present aspects of learner experiences" (Cox, 2017, p. 99).

This study utilized many data collection methods besides the TROPOS, including vast amounts of qualitative data coded in alignment with the TROPOS subscales. Each TROPOS (2017, 2021) subscale was used as a qualitative code. The researcher also created and used one

additional code title, *anti-criticality*, to capture statements that exhibited resistance to critical reflection.

After the conclusion of interventions I & II, a third intervention was held as an open discussion and reflection on the first two interventions. The TROPOS (Cox, 2017, 2021) was not utilized for intervention III, but the discussion may have facilitated more room for postlearning reflection. The code frequencies for all three interventions are compared in Table 4.4.

Table 4.4

Qualitative Code Frequency for Study Interventions I, II and III

Code frequency	Intervention I	Intervention II	Intervention III
Social support	4	0	1
Attitude towards uncertainty	2	5	5
Criticality	0	3	0
Anti-criticality	0	0	2
Transformative outcomes	0	0	2

This qualitative coding reflected high levels of attitude towards uncertainty and low levels of criticality. Nevertheless, intervention III showed a higher frequency of statements indicating *transformative outcomes*. The progression toward *transformative outcomes* in intervention III, during which guided reflections took place regarding interventions I and II, suggests a fuller picture. Therefore, compared to this study, prior studies may have reached a conclusion allowing for reflection prior to administering the TROPOS (Cox, 2017, 2021) that this study did not.

Table 4.5

Sample Quotes Per Code

Code	Sample quote
Social support	*this is a safe space*
Attitude towards uncertainty	*The workshop helped me think more about issues related to diversity and study abroad that I had not previously considered*
Criticality	*But also recognizing that Okay, so we're gonna go be going to talk to a group of Black men. That's not just who we're talking to, we're talking to individuals along a spectrum, who, yes, their, you know, surface level status and ethnicity. But, they all have a personal story that we want to try to engage with and that takes more work, right? It's not just that you can just label a group and be like, okay, we're going to give you all these resources, and they should impact you that exact same way across the board. But, I think just even recognizing that upfront and making that part of how you advise students that market study abroad, is more encouraging for students to be hearing that you're coming from that perspective. And that vantage point than if you weren't, if you weren't to recognize that.*
Anti-criticality	*maybe it is not on the, at the top of the list of priorities, unless someone in the unit says, this is a priority for you to go to these meetings*
Transformative outcomes	*We're having conversations with the students, we're meeting them where they are, you know, we're navigating the website with them, if they're just confused about how to even do that, you know, like, we're giving them that opportunity to tell us what they need to instead of us thinking what they need, if that makes sense so it's a lot more conversational, and dialogue focused, I guess*

Outcomes by Intervention Group

The results indicated that the mean of each subscale was higher for intervention II, most notably in the *transformative outcomes* subscale. A unique contrast is the high mean reported for *social support* in intervention I. As noted earlier, the interventions were structured similarly, with the main difference being only the participants and purpose. In intervention I, the *BME and Study Abroad Advisors Collaboration Workshop*, the intent was clearly presented in the title. Moreover, this workshop brought together two groups, BME and study abroad advisors, to explore ways in which they could collaborate to raise interest in study abroad within the BME community. Intervention II, *Inclusive Advising Practices*, was focused solely on learning and exploring ways to make study abroad practices more inclusive and was attended chiefly by study abroad advisors (82%).

Cox (2017) highlighted that the literature on transformative literature has reached "considerable agreement…regarding how individuals experiencing transformative learning pursue and engage in a social support network," with the consensus being that "for many this involves social support grounded within a common experience" (pp. 38–39). Cox (2017) concluded that *social support* "can either inhibit or promote transformative learning, depending on the broader context in which such support occurs" (p. 43). Accordingly, it is possible that pairing BME and study abroad advisors may have encouraged social support but inhibited transformative learning due to a lack of common experience. The processes of *social support*, *attitude toward uncertainty*, and *criticality* are, according to Cox (2017), "independently insufficient to promote transformative learning; rather, the sufficient presence of all [three] processes increases the likelihood [that] transformative learning outcomes occur" (p. 43). This concept is illustrated in Figure 4.7 by the consistency of means reported for intervention II.

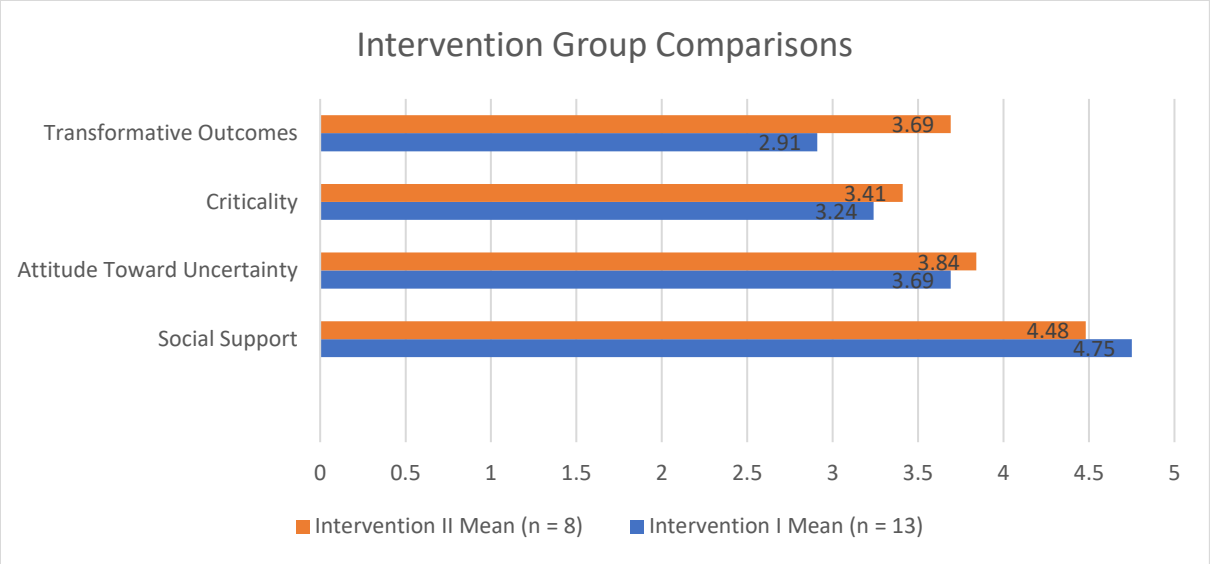


Figure 4.7. TROPOS Subscale Mean Comparisons in Study Interventions.

In conclusion, this study, like others, found that the participant demographics of learning groups and the social support cultivated within groups can either assist or hinder transformative outcomes. While both interventions measured by the TROPOS (Cox, 2017, 2021) displayed high means for *social support*, the mean for *transformative outcomes* was higher in intervention II, for which the participant pool consisted of participants from the same profession (study abroad advisors) and racial composition. In intervention I, where the participants comprised both BME and study abroad advisors, a high mean for *social support* was reported, but transformative outcomes were lower than for intervention II.

The underlying theory of this study is based on Mezirow's (1994, 1997, 2000) theory of perspective transformation. Although his theory centered on individual transformation, Mezirow (1997) acknowledged the importance of group dynamics and dialogue to help one achieve transformation, stating that the "key idea is to help the learners actively engage the concepts presented in the context of their own lives and collectively critically assess the justification of

new knowledge…they are frequently challenged to identify and examine assumptions, including their own" (p. 10).

The purpose of this AR study was to explore how the introduction of inclusive and equitable practices in study abroad may change study abroad advisors' perspectives regarding their current practices. The project goal was to introduce study abroad advisors to other USS professionals who represent demographics, such as African American male students, that participate in study abroad at low rates, provide study abroad advisors with information regarding inclusive practices, and then engage in discourse and reflection guided by transformative pedagogies. While the goals of the study were individual in nature, the systemic context of the study lends itself to group and systematic changes. As such, all interventions were group-based to facilitate learning in concert with others. According to Mezirow (1994), "social norms are sometimes changed through individuals acting in concert (though not collectively), through support groups, through heightened awareness and emotional reinforcement" (p. 230). In this study, it appears that both the exposure to new ideas and the support of the participant groups with shared experiences facilitated more *transformative outcomes* both individually and collectively.

Insights

The eight findings of this study were analyzed to generate broader meaning and insights derived from the two research questions regarding perspective transformation and the use of transformative pedagogies that framed this study. Those research questions are restated below:

> *What is learned at the individual, group, and system levels that advances theory and practice in an AR project focused on perspective transformation?*

To what extent were transformative outcomes facilitated in interventions designed based on transformative pedagogies?

Research initiated by these two research questions yielded the following insights.

Insight 1: Using Action Research to Develop and Enact Workplace Initiatives Deepens Stakeholder Buy-In and Helps it Filter Through Systems

In this study, the use of AR became the vehicle that enabled perspective shifts in AR team members, allowing them to work towards similar changes in the study abroad community within the USS. The ability of AR team members to collaborate on the problem of noninclusive practices within study abroad, which was found in cycle 1 of the study, enhanced their buy-in regarding our work. In turn, they created interventions, which included the development of new roles for themselves in presenting material to participants from across the USS to promote their new message. Franz (2002) noted:

> Frequently people don't realize or acknowledge how they have changed through their work together. Some of them, in this unknowing stance affect change in others. Other people who are aware of their own transformation consciously choose to change themselves and/or work towards change in others. (p. 6)

Moreover, this study also confirms Franz's (2002) conclusion that "administrators need to create and support environments that facilitate cross-profession relationship building…[including] opportunities for staff to meet each other and engage in discourse, to solve problems together, and share work with others" (p. 6). What Franz has described in this statement is AR. In this study, the AR methodology allowed groups that had not traditionally worked together to collaborate and work in concert to solve a problem by creating interventions and developing discourse across functional areas, job classifications, and the USS.

Insight 2: The Goals of Action Research and Perspective Transformation Innately Align

Sagor (2011) defined AR as any "investigation by the person or the people empowered to take action concerning their own actions, for the purpose of improving their future actions" (p. 5). The findings of this study, which was guided by Mezirow's (1991, 1997) theory on perspective transformation, align with the key elements of that theory. Nevertheless, when considering them holistically, any perspective transformation realized in this study was a result of the investigative structure of AR, which is very clearly based in and on action. As Mezirow (1994) reminded us:

> transformative learning is central to what adult education is all about…the progressive realization of an adult's capacity to fully and freely participate in rational dialogue to achieve a broader, more discriminating, permeable and integrative understanding of his/her experience as a guide to action. (p. 226)

In the development of interventions, the action research team followed Coghlan's (2019) AR model of constructing, planning for action, taking action, and evaluating action. Through the lens of Mezirow's 10 phases of perspective transformation (Mezirow, 1991), it is evident that the experience of each phase aligns with both action and change (see Figure 4.8 for an illustration of this alignment).

Figure 4.8. Alignment of Action Research and Perspective Transformation.

The notion of alignment between theory and methodology is further supported by Mezirow's (1994) statement that "through critical reflection on the content of a program or on the process of problem solving we effect transformations in meaning schemes" (p. 228). This assertion affirms the broad idea generated by this study that perspective transformation will naturally be ignited by using AR teams and transformative pedagogies to tackle organizational problems.

Insight 3: Perspective Transformation Can Be Realized in Group-Level Learning

This study spotlights an aspect of Mezirow's (1991) perspective transformation theory that has seen little research to date. The process of perspective transformation is seen by Mezirow through a constructivist lens reflecting that "meaning exists within ourselves rather than in external forms such as books and that personal meanings that we attribute to our experience are acquired and validated through human interaction" (Mezirow, 1991, p. xiv). Mezirow (1991) viewed perspective transformation as only taking place at the individual level, in that it "involves our sense of self and always involves critical reflection" (p. 167) regarding our meaning structures.

In response to critique of his theory, Mezirow (1994) highlighted that, in transformative learning, the action that one takes and the "role of the educator are different" (p. 229) than what is developed through normal adult development and the consciousness-raising that can take place through collective social action. He offered the example of "a woman who, through consciousness-raising, experiences a perspective transformation through which she comes to see how society has arbitrarily defined her role, limited her options and institutionalized these values" (Mezirow, 1994, p. 229). This study found that through the institutionalization of practices, the need to recruit students of a certain social and racial demographic—one more likely to go abroad—had limited the general view of the profession itself concerning how and to whom to market study abroad. In this case, realization and questioning occurred at the group level of the limitations of the practices they had inherited and perpetuated. Although the individual reflection that took place should not be ignored, their transformation arose as a collective group. The group dynamic that existed in their shared aspects (i.e., profession, demographics, institutional expectations, and pressures) likely helped to facilitate the group shift

toward the realization of how closed their practices were to groups that traditionally have not participated in study abroad.

Insight 4: Small Wins Are Necessary To Maintain Motivation

In a 1984 article Karl Weick, discussed the notion of small wins. He proposed that large social problems, such as the underlying social and institutional structural issues brought up in this study, can overwhelm people, which prevents them from doing anything about them. His approach is to "recast larger problems into smaller, less arousing problems, [so] people can identify a series of controllable opportunities…that produce visible results…this strategy of small wins addresses social problems by working directly on their construction and indirectly on their resolution" (Weick, 1984, p. 40). In this study, this strategy was utilized by many of the participants in the workshops and focus groups, without prompting. The notion of changing the wording on study abroad programs and flyers from apply to sign-up can make programs seem more accessible to diverse students. Evaluating scholarship applications on desire or what effect the experience may have for someone rather than meritocracy can assist advisors in creating a more level playing field for first-generation college students with little social capital. These "quick, opportunistic, tangible first steps [that are] only moderately related to the final outcome" (Weick, 1984, p. 42) helped the participants think of immediate ways they could do something within their control to help students gain access to study abroad.

This study also elicited feelings in some participants that were small but made a big impact. The notion of being seen and heard was very impactful and changed feelings away from apathy and towards optimism. The small act of including the voices of people affected by a problem can create small wins, and these "new allies bring new solutions with them and old opponents change their habits" (Weick, 1984, p. 43). When small wins are accomplished,

"feedback is immediate and can be used to revise theories" (Weick, 1984, p. 44), which is reminiscent of Mezirow's (1994) views on one's frame of reference, which includes your point of view. Points of view are subject to feedback through reflection and dialouge (Merriam & Baumgartner, 2020), and once changed, how we see ourselves and the world changes, which leads to perspective transformation (Mezirow, 1994).

This study reaffirmed the importance of small wins outlined by Weick (1984) and how these may contribute to one's ability to progress toward more significant and overwhelming aspects of organizational and societal problems. These small wins are often only noticed in retrospect, which requires reflection, a key component of perspective transformation. Therefore, small wins are a necessary, sometimes accidental outcome that can help propel learning and transformation.

Insight 5: Group-Level Transformation Must Be Nurtured Through Communities of Practice or Ongoing Professional Development to Reach Integration

One of the final phases of Mezirow's (1991) perspective transformation model is the "building of competence and self-confidence in new roles and relationships," which takes place prior to the final phase, which culminates in the "reintegration into one's life on the basis of conditions dictated by one's new perspective" (p. 169). This study found that the leap from the competence stage to the reintegration stage in a group setting requires nurturing. This finding confirms those of Franz (2002), who studied transformative learning in partnerships and found that transformation with partners was assisted through "independence with interdependence" (p. 5). The participants in Franz's study referred to this relationship as "the process of retaining personal autonomy yet depending on the other partner to enhance the success of the work" (Franz, 2002, p. 5). This study affirmed this idea. The study abroad advisors who came to hold

new views of their work expressed the need to continue working with others who had also experienced this transformation. They felt that supporting one another would help them continue to build competence in their new perspectives. Franz (2002) also found that to "help transforming partnerships [to] flourish" (p. 8), organizations need to provide support and environments in which people can connect with others to share ideas and foster conversations about their shared missions.

Implications for Future Research

Using transformative learning in workplace learning and professional development for staff needs further research. Very little research exists regarding the use of transformative learning in staff (i.e., nonteaching employees) professional development (Franz, 2010), as it is mostly used in educational/classroom settings. Organizations that utilize the critical reflection and discourse created by transformative practices can realize greater connections to and among employees. While this study occurred in an educational environment, it did not deal with curriculum or assignments. Instead, it involved learning and collaboration to create new ways to further a mission of providing study abroad to more students.

More research should be conducted on the structures and assumptions at institutions that determine practices. In many cases, and in nearly all study abroad research, the focus is on the student, but only rarely on the staff or institutional culture that creates and administers the programs. A reexamination of traditional practices needs to take place for real change to happen. Just as a critical component of perspective transformation is critical *self*-reflection, institutions need to engage in critical *institutional* reflection. Maybe it is not the students who need to be changed, but the people who work there.

Finally, the AR methodology can be a powerful tool in helping diagnose organizational issues and then address them in a cross-functional, cross-hierarchical way. More research using this methodology in workplace learning should be considered, especially in higher education, a realm that largely remains siloed space. Faculty, staff, fiscal affairs, and administrative services work within their own worlds and impart policy and rules upon others. Working cross-functionally and across employee classification levels to find solutions that work for everyone, rather than just one unit, could create more functional and happier organizations. Utilizing the collaborative, democratic, and practical nature of AR to address issues serves to facilitate actions that improve both people and policies.

Limitations

Several limitations affected the nature of this research study and the outcomes. One limitation was the effect of COVID-19 on the study abroad community throughout much of this study. Although this study began in 2021, nearly all study abroad programs within and affiliated with the USS remained halted until 2022, so inquiring about practices was difficult during a time when people were not actively "practicing" their profession. Calls to change the study to address new ideas in international education involving study away (domestic student travel) or international virtual exchange sometimes distracted participants from remaining focused on study abroad, as many questioned if it would even return.

Another limitation was the ability to enact change at the system level, meaning in the offices of the USS. As the researcher, I held role duality by representing the system and the AR project, but I did not have the ability to create change at levels above me. This limitation is both positional and driven by a political environment that is hesitant to pursue ideas about diversity

and inclusion efforts. Due to this situation, the findings at the system level and the ability to realize a broad impact as a result of this study are limited.

Final Reflection

This study was guided by Mezirow's (1991) theory on perspective transformation. It included many quotes and realizations from AR team members and intervention participants documenting their perspective shifts throughout the 16 months in which the study took place. I would be remiss if I did not document the greatest perspective transformation of all, which was my own. Throughout this study, I often doubted and disliked the AR process of collaborative inquiry. I wanted to lead and have others follow instructions, but I never looked back once I finally submitted to the process. Putting together a multi-institutional team to address a system-wide issue helped me look at our problem from viewpoints that I would have never experienced without the AR team. In all of my work with the USS going forward, I plan to use these types of cross-functional, multi-institutional teams to create new programs and address issues.

Leading change in the way that AR demanded allowed me to see leadership in a different way than is demonstrated in my own organization and through media and American culture. We are taught that we need strong and decisive personalities to lead others and get results. This type of leadership is certainly needed in some instances, but in my life and in the organizations I am and will continue to be a part of, I see now that this is a false story of leadership. This type of leadership simply creates followers and inflates the egos of those "strong" leaders. To truly lead *with* others, where all people have a voice, is truly how change occurs. Change and results are two different things. Based on the outcomes of this study and my own personal reaction to what I saw occur in others, I believe that change happens in groups, and the inclusion of more people who can experience a voice within a change is how results should be measured. The idea of

leadership without authority has always intrigued me, but I think that each member of the AR team, including myself, experienced a form of this through this study. We led a change in others that many did not know was needed and that was politically unpalatable, but we did it anyway and have measured our success via our own perspective transformations.

Finally, I gained a new perspective on how institutional structure can hinder progress, regardless of the intention. Only upon examining the pressures that exist to maintain participant numbers in study abroad, which are all based on financial support from an institution, did I realize how noninclusive practices have been and how those traditions continue based on administrative and political decisions outside of the control of study abroad offices and advisors. These same pressures exist in many areas of higher education, and I cannot now "unsee" them. Despite my new view, that now observes so much more inequity than I ever saw before, I do not want to leave higher education. Instead, this process has spurred me to continue working as an agent of change. There is an old saying: "You can't clean the house if you aren't in it." I will stay in this house and work on it one room at a time.

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