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The benefits of voluntary disorienting dilemmas for a transformational life: a grounded theory study in transformational learning

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THE BENEFITS OF VOLUNTARY DISORIENTING DILEMMAS FOR A

TRANSFORMATIONAL LIFE: A GROUNDED THEORY STUDY IN

TRANSFORMATIONAL LEARNING

A dissertation submitted in partial satisfaction

of the requirements for the degree of

Doctor of Philosophy in Global Leadership and Change

by

Rebecca Bamberger

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This dissertation, written by

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under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

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VITA

EDUCATION

University of Pittsburgh, Katz Business School
MBA, 2006 - 2007
As the youngest graduate student to date (I entered at age 19), I completed my MBA in 1.5 years with a specialization in marketing.

University of California, Los Angeles
B.S. in Economics, 2002 - 2004
I launched a college TV show called "Talk Back," served as a college dorm counselor, and completed my four-year degree in two years.

WORK EXPERIENCE

Founder and CEO, BAM
2008 – Present
I oversee more than 30 employees and direct the brand, vision, and business development responsibilities for our venture backed clients.

Founder and CEO, OnePitch
2017 – Present
A SaaS platform for journalists and publicists, OnePitch is a leading PR tool used by thousands of journalists and publicists a month.

Contributing Writer, outlets including Forbes, Fast Company, AdAge
2009 – Present
I've written for several national media outlets including Fast Company, AdAge, Forbes, Inc, and more.

CEO, Bite San Diego
2011 – 2016
I launched what became the largest food tour in San Diego which was sold for six figures in 2016 and remains in operation today.

Host and Producer, CW and Fox Network
2007 – 2010
After a few years of internships and producer work at NBC, KQED, and KUSI, I launched my own TV show which won me an Emmy in 2010.

ABSTRACT

Being uncomfortable by choice as a means of personal growth has been touted for hundreds of years among scholars, philosophers, religious leaders, modern pop culture icons, and more. Yet, research pertaining to the benefits of being uncomfortable by choice is sparse. This qualitative, grounded theory study addressed the first step of transformational learning: the disorienting dilemma. Seventy participants located in America participated in extensive interviews to answer this study's research question, "what if any, are the benefits of voluntary disorienting dilemmas?" Additional research questions, "what is the meaning(s) of voluntary disorienting dilemmas?" and "would subjects repeat their voluntary disorienting dilemmas again? Why or why not?" further contributed to the theoretical model presented in this study on the benefits, meanings, and motivations of voluntary disorienting dilemmas. This body of work adds to transformational learning theory and has implications for sociology, change management, global leadership, and more.

Keywords: voluntary disorienting dilemmas, transformational learning theory, Mezirow, change management

Chapter 1: Introduction of the Study

Being uncomfortable by choice as a means of personal growth has been touted for hundreds of years. Ancient Greek Stoics from the 3rd century BC urged the practice of "voluntary discomfort." Seneca, one of the most noted Stoics, instructed, "Set aside a certain number of days, during which you shall be content with the scantiest and cheapest fare, with coarse and rough dress, saying to yourself the while: "Is this the condition that I feared?"" (Seneca & Hadas, 1968, p. 163). In the New Testament written from 50 to 100 AD, Jesus called people who are hungry, destitute, grieving, or suffering for His sake "blessed." Jesus in Matthew 5:1–12 (*King James Bible*, 1769/2008) said that one would not be, "hungry for righteousness sake" if one is too comfortable. The U.S. Navy sea, air, and land (SEAL) teams, established in the 1960s under President John F. Kennedy as an elite taskforce, operated under the motto, "Get comfortable being uncomfortable" (United States Navy, n.d.).

The practice of being uncomfortable by choice continues to expand beyond centuries of philosophical, religious, and military doctrines. For the last 40 years, academics have purposely classified being uncomfortable or voluntary discomfort within transformational learning theory (Mezirow, 1978a, 1991a). First introduced in Jack Mezirow (1978a, 1991a), transformative learning theory holds that learners, particularly adults, can significantly modify their thinking and perspectives based on new information. The first step of transformational learning is a voluntary or involuntary "disorienting dilemma," a dramatic moment when the learner is confronted with a situation that is distressing, unknown, challenging, and/or debilitating (Mezirow, 1978a, 1991a).

Whether voluntary or not, disorienting dilemmas are prolific in several fields of research and industries. In change management, organizations can confront change and "melt" away old

ways of being to transform (Lewin, 1951). In higher education, students may be challenged by study abroad experiences, which alter their worldviews and sense of self (Strange & Gibson, 2017). In leadership theory, transformational leaders challenge followers to confront the status quo, an often difficult and unsettling activity (Burns, 1978).

Despite the prevalence of disorienting dilemmas in multiple fields, centuries of doctrines, and more than 40 years of study within transformational learning theory, little is known about voluntary disorienting dilemmas. Further, the benefits, meanings, or drawbacks of undertaking voluntary disorienting dilemmas are limited. Using the framework of transformational learning theory, this qualitative grounded theory study encompassed an investigation of the benefits, meanings, and outcomes of a subset of the disorienting dilemma: those that are voluntary and self-imposed.

Background

The origin of transformational learning theory and how the disorienting dilemma fits within it are beneficial to understand for this study. During the "second wave" of feminism within the United States, the number of women from age 25–34 attending college exceeded 100% from 1970 to 1975 (Mezirow, 1978a, p. 2). Edee Mezirow was one such woman determined to complete her formal education. Her husband, Jack Mezirow, a professor at Teachers College of Adult and Continuing Education at Columbia University, was "enlightened' and "fascinated" by the changes he witnessed in his wife during and post her college experience (Mezirow, 1991a, p. xvii). He noticed a dramatic "personal transformation" in Edee who eventually became the Director of Development for two prominent dance companies in New York City following her degree (Mezirow, 1991a).

Curious of his wife's apparent transformation, Mezirow, along with his research assistant, Victoria Marsick, conducted a national study in the late 1970s on women returning to colleges to complete their undergraduate degrees. The study cemented the transformation hunch Mezirow had formed in observing his wife: women who reentered college emerged with new perspectives of the world, different views of themselves, and new behaviors that far exceeded any knowledge gained from a single lecture or textbook (Mezirow, 1978a). Mezirow's findings of the study, fused with his academic background of the concept of paradigms (Kuhn, 1962), theorizing of conscientization (Freire, 1970), and theory of communicative action (Kubacki, 1994), led him to the theory of transformational learning.

Mezirow defined transformational learning as, "constructivist, an orientation which holds that the way learners interpret and reinterpret their sense experience is central to making meaning and hence learning" (Mezirow, 1994, p. 222). According to Mezirow (1978a), transformational learning can only occur after perspective transformation, an essential dimension of learning within adulthood where the learner recognizes and reassesses the origins of her frame of thinking, feeling, and acting. Such a perspective transformation is rare because it demands an individual to change frames of reference and critically evaluate deep-seated ways of being often (Mezirow, 1978a). These perspective transformations, however, can occur urgently with a disorienting dilemma, the first step of transformational learning. Mezirow explained,

> For a perspective transformation to occur, a painful reappraisal of our current perspective must be thrust upon us. Among the re-entry women whom we interviewed, the disturbing event was often external in origin—the death of a husband, a divorce, the loss of a job, a change of city of residence, retirement, an empty nest, a remarriage, the near fatal accident of an only child, or jealousy of a friend who had launched a new career

successfully. These disorienting dilemmas of adulthood can dissociate one from long-established modes of living and bring into sharp focus questions of identity, of the meaning and direction of one's life. (1978a, p. 12)

Mezirow identified another nine steps following the first step of the disorienting dilemma, which are noted in Table 1.

Table 1

Mezirow's Ten Phases of Transformative Learning

Ten Phases of Transformative Learning
Phase 1 A disorienting dilemma
Phase 2 Self- examination
Phase 3 A critical assessment of assumptions
Phase 4 Recognition of a connection between one's discontent and the process of transformation
Phase 5 Explorations of options for new roles, relationships, and actions
Phase 6 Planning a course of action
Phase 7 Acquiring knowledge and skills for implementing one's plan
Phase 8 Provisional trying of new roles
Phase 9 Building competence and self-confidence in new roles and relationships
Phase 10 Reintegration of a new perspective into one's life

Note. Adapted from *Education for perspective transformation: Women's re-entry programs in community colleges* (pp. 168–169) by J. Mezrow, 1978a, Centre for Adult Education, Teachers College, Columbia University.

Mezirow's seminal work of transformational learning, initially related to women reentering college in the 1970s, unleashed his career and cemented him as the founder of transformational learning theory within the field of learning. When Mezirow presented his study at the 1978 Adult Education Research Conference, he received a standing ovation (Teachers College, 2014). Nearly 50 years later, transformational learning theory is still being studied, critiqued, and expanded across the globe.

Statement of the Problem

Transformational learning and its global reach across academia is immense. Well-established international conferences, such as the Transformative Learning Conference and the Biennial International Transformative Learning Conference (ITLC), attract hundreds of

practitioners and academics around the world who debate and contribute research to the field (ITLC, n.d.). Peer-reviewed journals specifically focused on transformational learning are numerous, including the Global Journal of Transformative Education and the Journal of Transformative Learning. Dozens of books have been published about transformational learning, with some solely focusing on stories of transformational learning in the classroom and beyond (Kroth & Cranton, 2014). For some scholars, transformational learning remains, "the most researched and discussed theory in the field of adult education" (Taylor, 2007, p. 173).

Despite transformational learning's magnitude as a global discipline and foundation of adult learning, the first step of transformational learning, the disorienting dilemma, has not been fully explored. Though accepted as the essential first step of transformational learning, the disorienting dilemma's benefits, meanings, or merits remain nebulous, particularly if a disorienting dilemma is pursued by choice as a voluntary decision. Scholars of transformational learning have called for further research for decades. Taylor (1997) noted that only two studies, at the time, incorporated analysis of the disorienting dilemmas. A recent qualitative descriptive study showed that only 103 empirical studies included the disorienting dilemma from 2003 to 2017 (Ensign, 2019).

Voluntary disorienting dilemmas, the kinds urged by influencers from the Ancient Greek Stoics to U.S. Navy Seals, are less studied or understood. Ensign (2019) developed the Disorientation Index and found that only more than half (45) of the qualitative descriptive study's disorienting dilemmas were voluntary compared to 37 that were involuntary. According to Ensign, voluntary disorienting dilemmas were limited to 11 contexts, most of which were educational: study abroad programs, professional development, career, adult learning class or experience, entire college experience, and higher education class (Ensign, 2019). The remaining

five contexts included reading/poetry/television, identity and human development, workplace, environmental experience, and race/class/gender and political experiences (Ensign, 2019). The limited number of studies pertaining to voluntary disorienting dilemmas and their contexts, most of which are narrowed to privileged educational or professional experiences, provided the impetus for this study, as the meanings and benefits of voluntary disorienting dilemmas are unknown.

Purpose of the Study

Because of the significant gap of research and understanding of voluntary disorienting dilemmas, the purpose of this qualitative grounded theory study was to explore the benefits, meanings, and outcomes of voluntary disorienting dilemmas. Specifically, the aim of this study was to identify the fundamental benefits of voluntary disorienting dilemmas beyond the 11 situational contexts in the limited studies to date. In addition, the researcher sought to determine whether subjects would repeat voluntary disorienting dilemmas again and define the meanings of voluntary disorienting dilemmas beyond their contexts. Using data analysis and data collection as well as open, axial, and selective coding of grounded theory, the researcher proposed a theoretical framework of voluntary disorienting dilemmas to contribute to transformational learning's understanding, applications, and merits (see Glaser & Strauss, 1967).

Research Question

This study encompassed an exploration of voluntary disorienting dilemmas to contribute to the body of research within transformational learning theory surrounding disorienting dilemmas. The central research question of this study (RQ1) was as follows: "what, if any, are the benefits of voluntary disorienting dilemmas?" Because of the voluntary nature of this kind of disorienting dilemmas, the following additional sub-questions guided this study:

- RQ2: What is the meaning(s) of voluntary disorienting dilemmas?

- RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?

Significance of the Study

Transformational learning remains a dominant theory within adult education that is expanding to other fields with continued research (Baumgartner, 2001). As Baumgartner noted, "Philosophical approaches to transformational learning multiply as new research generates fresh ideas," (2001, p. 22). The first step of transformational learning, the disorienting dilemma, has emerged extensively, though phrased differently, in other fields of research beyond adult learning. Disorienting dilemma is referenced as a "life crisis" in psychosociology (Nuckolls et al., 1972); "cognitive dissonance" in sociology (Festinger, 1962); "crucible moments" in the managerial sciences (Bennis & Thomas, 2002); "black swan event" in finance theory (Taleb, 2007), "ah ha" moments in education (Pilcher, 2016); "triggering events" in global leadership (Mendenhall et al., 2018); and "unfreezing" in change management (Lewin, 1947).

Though the phrasing of disorienting dilemmas varies across academic disciplines, its prevalence is clear. Further understanding of voluntary disorienting dilemmas, which the researcher explored in this study, could be significant to scholars and academics in many disciplines, particularly in three areas: sociology, change management, and global leadership. The significance for these disciplines is discussed in the following subsections.

Significance for Sociology

First, the theory of cognitive dissonance in sociology has notable similarities to disorienting dilemmas. Cognitive dissonance was coined in the 1950s by Leon Festinger (1957) who asserted that inconsistencies among cognitions (i.e., knowledge, opinions, or beliefs) create

uncomfortable emotions, the cognitive dissonance state. Festinger (1987) elaborated that the uncomfortable emotions felt in cognitive dissonance further include general unease with no direct or obvious source, confusion, a deep sense of conflict, an external or internal feeling of being a hypocrite, and a sense of feeling paralyzed regarding what actions to take. Disorienting dilemmas, as described by Taylor (2000), are not necessarily as profound as cognitive dissonance but can "trigger a questioning of assumptions, resulting in transformed beliefs" as well as spur action (Taylor, 2000). Mezirow (1978b) mentioned that disorienting dilemmas spur transformational learning because "creative integration of new experience into one's frame of reference no longer resolves the conflict" (p. 104). Cognitive dissonance and disorienting dilemmas, either voluntary or involuntary, are arguably similar experiences.

Today's sociology scholars have expanded the theory of cognitive dissonance to other fields and applications, including the integration of transformational learning and disorienting dilemmas. Cooper (2019) asserted, "The time is right for dissonance to show its mettle as a principle for real world change" (p. 9). For instance, cognitive dissonance has been applied in therapeutic procedures in depression (Tryon & Misurell, 2008) and addiction (Simmons et al., 2013) and by individuals who recover from depression, addiction, and other mental health issues after experiencing cognitive dissonance. Additional research in human neuroscience is emerging related to the "rewards" of pushing through cognitive dissonance (Harmon-Jones et al., 2020). Cooper concluded, "social scientists have learned so much about the dissonance concept as a force that drives our thoughts and behaviors, that we are in an excellent position to apply it confidently to improve aspects of people's lives" (p. 19). Thoughts and behaviors that improve an individual's life are part of transformational learning (Mezirow, 1978b).

Significance for Change Management

The largest impact this study is likely in the field of change management. Numerous theories have focused on bewilderment, uncertainty, uneasiness, and indecision, which occur before change occurs within organizations. Three main change theories are discussed in this subsection to explore how voluntary disorienting dilemmas can contribute to change management theories: Lewin's change theory, Senge's fifth discipline model, and Kotter's eight-step change model.

A dominant theory in change management, Lewin's (1947) change theory focuses on a system that must be "disoriented" to change. An organization or system first must unfreeze, change, and finally freeze into its new permanent state (Lewin, 1947). The first phase of "unfreeze" is marked by chaos, frustration, and confusion, much like a disorienting dilemma (Schein, 1996). The final phase, "freeze," is a more desired and improved state than before the change occurred and it is the reason why a system or organization is likely to uphold the changed state (Lewis, 1994). This permanent change seen in Lewin's model is consistent with transformational learning theory, which holds that transformational learning is profound and cannot be undone after the first step of a disorienting dilemma and the steps following it are completed (Mezirow, 1978b).

Another theory within change management, which has a relationship to transformational learning and disorienting dilemmas, is Senge's fifth discipline model (Senge, 1990). In the third discipline of Senge's model, team learning is required for organizational change but faces seven potential "learning disabilities" (Senge, 1990). These disabilities include "I am in my position," which conveys a sense of wishing to stay in complete control and "the parable of the boiling frog," an illustration of how a frog can gradually get used to a change in the water's temperature

(Senge, 1990). Team learning and eventual change within an organization, according to Senge (1990), requires the ability to relinquish control and the patience to allow change and learning to occur. The disorienting dilemma is characterized by a lack of control, and transformational learning is gradual (Mezirow, 1978b).

The last change theory that may benefit from further understanding of voluntary or involuntary disorienting dilemmas is Kotter's eight-step change model. In the first step of Kotter's model, an organization must "create a sense of urgency" (Kotter, 1996). A main aspect of this step centers on an organization "creating" the need for change, whether voluntary or involuntary, which requires support from at least 75% of management, according to Kotter (1996). Kotter explained that this step may be met with resistance and confusion from those within the organization, much like the attributes of disorienting dilemmas.

Significance for Global Leadership

Building on the uncertainty and change within change management, global leadership is the last major area of study that is impacted by this study. In global leadership, scholars and practitioners have called for further research on "triggering events," a form of a disorienting dilemma, as globalization intensifies in the 21st century (Mendenhall et al., 2018). Triggering events, those that prompt a domino effect of impact to further areas, can create positive responses from leaders (Puente et al., 2007). Such events can also create resiliency in global leaders and the organizations they lead (Teo et al., 2017). Recent triggering events include the COVID-19 pandemic (Pollák et al., 2022), the Black Lives Matter movement (Dunivin et al., 2022), the war between Ukraine and Russia (Mariotti, 2022), and the ongoing climate crisis (Bandara et al., 2022), which collectively prevent any "return to normalcy" for global leaders.

Whether positive or negative, triggering events demand that global leaders obtain skills to handle ambiguity and the unknown, as the development in technology, supply chains, communications, and talent accelerate in the global economy (Mendenhall et al., 2018). Global leadership as an academic discipline has only emerged in the last three decades (Mendenhall et al., 2013), but several scholars have purported global leadership skills include understanding of greater volatility (Brake, 1997; Osland, 2008), embracing ambiguities that influence decision-making (Osland et al., 2007), and maintaining cognitive complexity (Levy et al., 2007). Tolerance for ambiguity spurred the creation of the Tolerance for Ambiguity Scale by Herman et al. (2010) who further showed global leader's tolerance for ambiguity was "positively related to performance in the global work environment and in cross-cultural settings" (p. 58). Deeper understanding of disorienting dilemmas, even those voluntarily sought by global leaders, could contribute to further frameworks and scales within global leadership to assist global leaders' navigation of the unknown.

Further exploration of the disorienting dilemma, particularly voluntary disorienting dilemmas, have notable implications for various fields of study. As Herbers and Mullins Nelson (2009) claimed, "Transformative learning theory provides a theoretical and praxis base to assist future educational and business leaders with the challenge of understanding and promoting the process of change" (p. 91). This study aims to add to the understanding of voluntary disorienting dilemmas in the fields of sociology, change management, and global leadership.

Positionality

This study was qualitative, a complex form of research whereby the researcher attempts to make sense, give meaning, and explain a phenomena from its natural setting (Denzin & Lincoln, 2000). Creswell (1994) further defined qualitative research as "an inquiry process of

understanding a social or human problem…reporting detailed views of informants" (pp. 1-2). A part of the complexity of qualitative research is the researcher's biases and lived experiences, which may impact the findings and become part of the data (Creswell & Poth, 2017). To ensure the quality of the research and integrity of findings, researchers must proactively disclose their positionality (J. L. Johnson et al., 2020). This study encompassed numerous positionalities. including:

- Age: The researcher is a millennial, born between 1981 and 1996 (Dimock, 2022).

- Professional experience: The researcher has been an entrepreneur nearly all of her life.

- Personal experience: The researcher has practiced voluntary discomfort regularly and for 5 years before this study.

- Geography: The researcher was born in America and has lived in America her entire life.

- Relationship to participants: Though not known personally to the researcher, the researcher used her professional network to source participants from social media websites.

- Gender: The researcher is a cisgender female.

Conceptual Framework

Conceptual frameworks are varied in definition and intent within academia. Ravitch and Riggan (2017) asserted that conceptual frameworks are, "an argument about why the topic one wishes to study matters, and why the means proposed to study it are appropriate and rigorous" (p. 5). Miles et al. (2020) described a conceptual framework more narrowly as key factors, variables, and constructs of a study explained graphically or narratively.

Considering the broad definitions of conceptual frameworks, the researcher devised a visual conceptual framework that pertains to RQ1: what, if any, are the benefits of voluntary disorienting dilemmas? The additional research questions that guided this study are as follows:

- RQ2: What is the meaning(s) of voluntary disorienting dilemmas?

- RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?

Situating the research of this study within Mezirow's transformational learning theory, the disorienting dilemma, the researcher mapped the benefits of voluntary disorienting dilemmas using grounded theory's open, axial, and selective codes. This study's conceptual framework is presented in Figure 1.

Figure 1

Conceptual Framework

Research Problem

Not enough is known about **voluntary** disorienting dilemmas

Study Purpose
Using qualitative grounded theory, the purpose of this study is to contribute to the research surrounding transformational leadership's first step, the disorienting dilemma

Research question

What, if any, are the benefits of voluntary disorienting dilemmas?

"life crisis," "crucible moments," "black swan events," "ah ha" moments

1 Exploring "disorienting dilemmas" within other learning theories

ZPD, Bridges' transition model, Kolb's experiential learning, King's Learning Activities Survey

2 Investing research on voluntary disorienting dilemmas

5 emerging themes from 29 academic works

3 Reviewing other uses of "disorienting dilemmas" in other areas

Definition of Terms

As noted by DiRenzo (1966), "Conceptual definition and theory formulation go hand in hand as necessary steps in one unified process of scientific research. The analysis of concepts is but one phase—a fundamental requisite—of that complex process of scientific inquiry which culminates in theory" (p. ix). When definitions are done and documented well, communication between researchers is clear, adding to better understanding and future research (Podsakoff et al., 2016). In this study, the following terms are used as defined:

- *Disorienting dilemma:* As described by Mezirow (1981), the founder of transformational learning theory, the disorienting dilemma is the first of the 10 steps in transformational learning. The disorienting dilemma is the spark of a transformative learning experience typically "denoting a life crisis that triggers a questioning of assumptions, resulting in transformed beliefs" (Taylor, 2000).

- *Context:* The interrelated conditions in which something exists or occurs (Merriam-Webster, n.d.-a).

- *Meaning* (noun)*:* Significant quality (Merriam-Webster, n.d.-a).

- *Perspective transformation:* As described by Mezirow (1981), perspective transformation is a process of becoming "critically aware of how and why the structure of psycho-cultural assumptions" has limited views of ourselves, others, and the world (p. 6).

- *Transformation:* Within the context of learning, transformation entails "those psychological, cognitive, and social processes of learning and education" (McWhinney & Markos, 2003).

- *Transformative learning:* Mezirow's action-orientated belief of learning is a "process of making a new or revised interpretation of the meaning of an experience which guides subsequent understanding, appreciation, and action" (Mezirow, 1990, p. 1). Hoggan defined transformative learning as a form of learning that cannot be undone, an experience that results in "significant and irreversible changes in the way a person experiences, conceptualizes, and interacts with the world" (2016, p. 77).

- *Transformative learning theory:* Initially proposed by Mezirow in 1978 as a theory of andragogy or adult learning, transformative learning theory holds that individuals create meaning from their lived experiences, which spur reflection, change, decisions, and actions (Mezirow, 1978a).

- *Voluntary:* An individual's will or from one's own choice or consent (Taylor, 2000).

- *Voluntary disorienting dilemma:* Combining the definition of "disorienting dilemma" with "voluntary," the definition used for this study is as follows: a transformative learning experience denoting a life crisis that triggers a questioning of assumptions, resulting in transformed beliefs that the participant chose or consented to.

Assumptions

Assumptions are inherent in all forms of research (Creswell & Poth, 2017). This qualitative study included three major assumptions. First, the researcher surmised that voluntary disorienting dilemmas have not been well studied or researched. This assumption emerged from various conversations and extensive review of the literature to date on transformational learning theory and disorienting dilemmas (T. Ensign, personal communication, May 13, 2022). Second, the researcher assumed bias from her and participants would be present in this study. Researcher bias, particularly confirmation bias occurs when the researcher tends to "favor" answers from participants that support the researcher's positionality or hypothesis (Wason, 1959), is embedded in this study to some degree. Participant bias is likely present in this study to some extent, particularly the Hawthorne effect when participants bias their answers to what they believe the researcher wants to hear (Adair, 1984).

Lastly, as noted by Glaser and Strauss (1967), grounded theory, which underpinned this study, has many assumptions. In particular, Glaser and Strauss (p. 9-10) delineated eight assumptions specific to grounded theory:

- The requirement to get "in the field" and discover real world information.

- The relevance of theory within actual data.

- The complexity of humans that informs any grounded theory.

- The belief that humans act to solve problems.

- The belief that humans act because of some motivation or meaning.

- The acceptance that meaning can be defined and redefined via exchange between subjects and researchers.

- The inherent sensitivity to the natural process of this theory.

- The interrelationships among structure, process, and outcomes.

These assumptions are not comprehensive for this study and should not be considered as such. The researcher acknowledges that unconscious assumptions are likely also present in this study, as they are inevitable in all research (Wolgemuth et al., 2017).

Limitations

Grounded theory underpinned this study, which is a qualitative method that relies on "'the discovery of theory from data systematically obtained from social research" (Glaser & Strauss, 1967, p. 2). Though grounded theory is regarded as a well-established and rigorous approach to research, it has several limitations (Simon & Goes, 2018). One main limitation of grounded theory and this study is the sample's selection criteria. As Corbin and Strauss (2015, p. 341) noted, there is, "little consensus about what constitutes an appropriate set of evaluation criteria for qualitative research." The sample's selection criteria discussed in Chapter 3 are limited. Two

additional limitations of this study are its geographical range and language used to conduct the interviews. This study focused only on subjects located in America and interviews occurred in English. In addition, the researcher recruited the participants from one digital platform, LinkedIn, which requires internet access to respond and often attracts adults who are employed (Davis et al., 2020). Lastly, the topic of voluntary disorienting dilemmas is a potential limitation of this study. As Affleck et al. (2013) noted, topics that may be viewed by subjects as difficult to speak to can impact the quality of the research. The researcher considered the limitations of sample selection criteria, geographical range, language, and topic of the interviews and mitigated them as much as feasible through thoughtful research design and meticulous execution of grounded theory methodology.

Delimitations

Delimitations define the boundaries of a study and its research (Mauch & Park, 2003). Similar to the assumptions and limitations, this study had several delimitations. The scope of this study was the fundamental delimitation of this study, as it pertained only to adult learning within the context of transformational learning. The narrow focus in this study on the first step of transformational learning, disorienting dilemmas, within Mezirow's transformational learning theory was another delimitation. The researcher did not pursue the remaining nine steps of transformational learning theory such self-examination or exploring or trying on new roles within this study. Another delimitation of this study was *voluntary* disorienting dilemmas, not situations described in other disorienting dilemma research such as the death of a spouse, a debilitating illness, or a natural disaster whereby a participant is forced to react to a devastating situation. In summary, this study focused on voluntary disorienting dilemmas, a subset of

disorienting dilemmas within transformational learning theory in the realm of adult learning. Figure 2 displays the focus of this study.

Figure 2

Topic Funnel
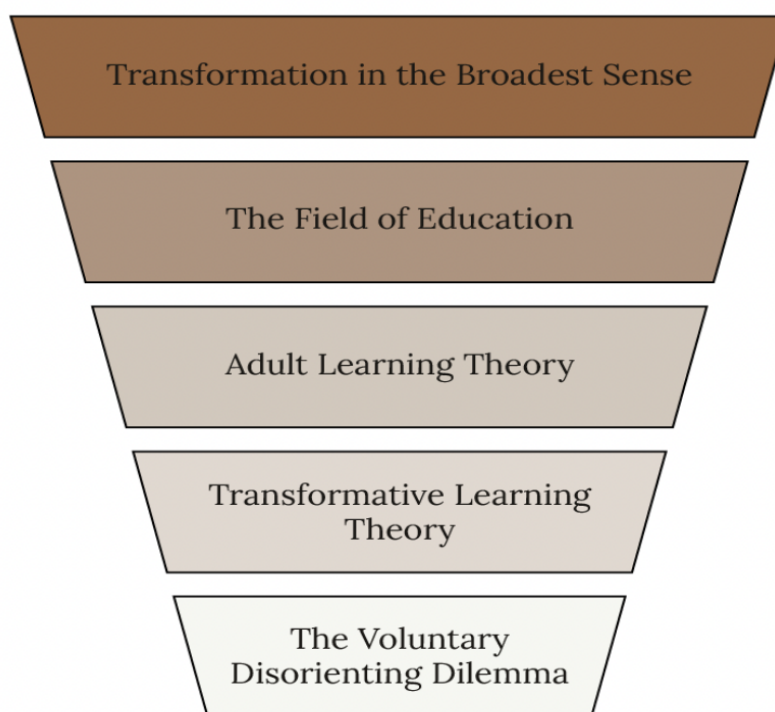
Organization of the Study

This qualitative grounded theory study is organized into five chapters to answer the guiding research question, "What, if any, are the benefits of voluntary disorienting dilemmas?" Chapter 1 included introduction of the centuries'-long adage to seek voluntary discomfort. In this chapter, the researcher established the context of voluntary discomfort, or the "voluntary disorienting dilemma," within transformational learning theory. The disorienting dilemma is the first of the 10 steps within transformational learning theory, a concept proposed by Mezirow

after observing the shift in his wife upon her completion of a college degree. In this chapter, the researcher also indicated the limited focus of this study, namely, the first step of transformational learning theory, the disorienting dilemma, and more pointedly, voluntary rather than involuntary disorienting dilemmas.

Chapter 1 continued with the statement of the problem, which is the notable lack of research surrounding voluntary disorienting dilemmas. The chapter included a central research question and two sub-research questions:

- RQ2: What is the meaning(s) of voluntary disorienting dilemmas?

- RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?

The researcher also outlined the significance of the study and its conceptual framework, limitations, delimitations, assumptions, and the positionality of the researcher.

Chapter 2 includes a detailed literature review. It starts with a review of transformational learning theory and the critiques of the theory among researchers. Next, the literature review is narrowed to the first step of transformational learning, the disorienting dilemma, and its presence in other learning theories. Lastly, the researcher presents a deep review of the Disorientation Index.

Research methodology is presented in Chapter 3. The context of the research, its theoretical framework, and research design are described. The researcher then provides the setting and sample of the research as well as the human subject considerations. In this chapter, the researcher also explores design validity and reliability, data management and analysis, and the theory development of the study.

Chapter 4 includes the study's findings. The chapter contains a review of the participants, their demographics, and key findings. In Chapter 5, the final chapter, the researcher explores the context and meaning of the findings, as well as the implications and recommendations for future research of the study's results.

Chapter Summary

Chapter 1 contained an introduction of this study's purpose, significance, constraints, and organization surrounding the first step of transformational learning, the disorienting dilemma. The field of transformational learning is massive and ever growing since its introduction in the 1950s by Mezirow. In this chapter, however, the researcher argued that the disorienting dilemma, and particular a subset of the disorienting dilemma, voluntary disorienting dilemmas, are notably under-studied. The aim of the qualitative grounded theory used in this study is to answer the research question, "what, if any, are the benefits of voluntary disorienting dilemmas?" Better understanding of voluntary disorienting dilemmas could support scholars and researchers in many fields, particularly sociology, change management, learning theory and education, global leadership.

Chapter 2: Review of Relevant Literature

Chapter Overview

The purpose of this qualitative grounded theory was to investigate voluntary disorienting dilemmas within transformational learning theory as little research has been conducted to explore the significance of voluntary disorienting dilemmas. The central research question of this study is, "What, if any, are the benefits of voluntary disorienting dilemmas?" Secondary research questions supporting the central research question are as follows:

- RQ2: What is the meaning(s) of voluntary disorienting dilemmas?

- RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?

In this chapter, a comprehensive review of related literature is undertaken to situate the voluntary disorienting dilemma in the context of transformational learning theory in four sections. First, the researcher analyzes the origins and evolution of transformational learning theory and its shortcomings as argued by scholars. Second, the researcher conducts a review of the disorienting dilemma to evaluate how Mezirow conveyed the first step of transformational learning and its importance in his original works. Next, a thorough review of the disorienting dilemma is conducted to contrast it with similar ideas and labels present in other learning theories. This chapter concludes with an analysis of the Disorientation Index, recent findings within the academic body of transformational learning theory, and the researcher's synthesis of all theories and findings discussed in the literature review.

Transformative Learning Theory

Jack Mezirow (1923-2014) has been christened the father of transformative learning and remained a prolific academic since he published the theory of transformative learning in 1971.

The author of more than 60 published works translated in more than six languages, Mezirow consistently refined, responded to, and developed transformative learning theory for over 40 years (WorldCat Identities, n.d.). The focus of this study pertained to the first step of transformational learning, the disorienting dilemma, and as such, the researcher did not conduct an extensive review of Mezirow's collection of work. Instead, in this section, the researcher narrows on Mezirow's use and development of the disorienting dilemma and the critiques and evolution of transformational learning and the disorienting dilemma since its debut.

Mezirow (1978a) developed transformative learning theory as a lens through which to understand adult education after observing his wife's transformation upon returning to school. He articulated a linear, detailed 10-step process to transformative learning, which included,

> (a) a disorienting dilemma; (b) self-examination; (c) a critical assessment of personally internalized role assumptions and a sense of alienation from traditional social expectations; (d) relating one's discontent to similar experiences of others or to public issues—recognizing that one's problem is shared and not exclusively a private matter; (e) exploring options for new ways of acting; (f) building competence and self-confidence in new roles; (g) planning a course of action; (h) acquiring knowledge and skills for implementing one's plans; (i) provisional efforts to try new roles and to assess feedback; and (j) a reintegration into society on the basis of conditions dictated by the new perspective. (Mezirow, 1978a, p. 7)

Mezirow (1991a) asserted that the first step, the disorienting dilemma, occurs when a person realizes that something they held certain has become less or wholly uncertain. Despite being only the first of several steps in transformational learning, Mezirow alluded and expanded on the disorienting dilemma numerous times in his seminal study and following journal article.

Table 2 includes all mentions of the disorienting dilemma within the study and journal article

published the same year to show its prevalence in this first work.

Table 2

Mentions of the Disorienting Experience in Mezirow's Seminal Journal Article and Study

Mentions of Disorienting Experience
"Life-crises" (p. 7)   "Disorienting dilemmas" (p. 7)   "Feeling of discontent ... problem without a name" (p. 7)   "Personal reappraisal" (p.11)   "For a perspective transformation to occur, a painful reappraisal of our current perspective must be thrust upon us" (p. 12)   "The disturbing event was often external in origin – the death of a husband, a divorce, the loss of a job, a change of city of residence, retirement, an empty nest, a remarriage, the near fatal accident of an only child, or jealousy of a friend who had launched a new career successfully" (p. 12)   "These disorienting dilemmas of adulthood can disassociate one from long-established modes of living and bring into sharp focus questions of identity, of the meaning and direction of one's life" (p. 12)   "Whether or not a woman comes into the program in response to a disorienting dilemma makes a crucial difference" (p. 12)
"Conventional learners who are still fully assimilated within a traditional cultural perspective, may well complete the re-entry program with enhanced self-confidence, having made progress toward their objectives and perhaps having acquired a useful skill" (pp. 12-13)   "In contrast ... threshold learners whose participation in a program is prompted by a disorienting dilemma" (p. 13) will be strongly influenced by the source of the dilemma.   "Two types [of dilemma] can be distinguished. One is an external event – the death of a husband, divorce, loss of a job, moving to a new city. The other is an internal, subjective experience – the feeling that life is not fulfilling, a sense of deprivation, the conviction that being only a housewife forecloses access to other rewarding experiences" (p. 13).   "Because the externally caused dilemma is likely to be less negotiable and to be more intense, it will more frequently lead to a perspective transformation. When the dilemma has an internal source, the degree of intensity accompanying it matters considerably and is often difficult to evaluate" (p. 13).   [Women responding to an internal event] "may be responding to changing social norms that require them to define their situation in this way and to explore other options actively. The women responding to an external dilemma, on the other hand, are likely to come into the program more traumatized and in a stage of panic about the urgent need to change" (p. 14).

Mentions of Disorienting Experience
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"Freire has shown that disorienting dilemmas can be induced to produce perspective transformation though adult education in illiterate adults in traditional societies" (p. 55).

"There are certain challenges or dilemmas of adult life that cannot be resolved by the usual way we handle problems – that is, by simply learning more about them or learning how to cope with them more effectively. Life becomes untenable, and we undergo significant phases of reassessment and growth in which familiar assumptions are challenged and new directions and commitments are chartered" (p. 101).

"Such dilemmas are commonplace in adult lives, but some are more dramatic than others. Examples are found in what popular writers have referred to as 'life crises.' The sudden loss of a mate or a job, a change of residence, graduation from college, betrayal or rejection, and scores of less significant interpersonal encounters as well as rapidly changing behavioral norms can create social or personal problems for which there are no ready-made answers" (p. 101).

"When a meaning perspective can no longer comfortably deal with anomalies in a new situation, a transformation can occur. Adding knowledge, skills, or increasing competencies within the present perspective is no longer functional; creative integration of new experience into one's frame of reference no longer resolves the conflict. One not only is made to react to one's own reactions, but to do so critically" (p. 104).

"Transformation in meaning perspective is precipitated by life's dilemmas which cannot be resolved by simply acquiring more information, enhancing problem solving skills or adding to one's competencies. Resolution of these dilemmas and transforming our meaning perspectives require that we become critically aware of the fact that we are caught in our own history and are reliving it and of the cultural and psychological assumptions which structure the way we see ourselves and others" (pp. 108-109)
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Note. Adapted from *Education for perspective transformation: Women's re-entry programs in community colleges* by J. Mezirow, 1978a, Teachers College, Columbia University, Center for Adult Education, and "Perspective transformation," by J. Mezirow, 1978b, *Adult Education*, *28*(2).

Reviewing the passages of the disorienting dilemma, the researcher drew three conclusions and made a notable observation. First, individual perspective is paramount. A disorienting dilemma to one person is not necessarily a disorienting dilemma to another. In addition, time and location is a construct to be considered. A disorienting dilemma from the 1990s in India is far different, potentially, from disorienting dilemmas experienced in the 1950s in America. Lastly, internal and external disorienting dilemmas are distinct. Those externally applied, such as the death of a loved one, are more objective than those internally confronted, such as feelings of being self-conscious, which are far more difficult to measure or even detect.

Finally, the researcher noted the confidence with which Mezirow (1978a) claimed his research would be paramount to education, stating, "transforming of meaning perspectives [may be] a salient dimension of adult development and a significant function of continuing education" (p. 7).

The self-aggrandizing tone of Mezirow's first study did not escape academia. Following the publication of Mezirow's transformational learning theory, several researchers eventually criticized and evaluated its merits. Edward W. Taylor (1997, 1998, 2007) became one of transformational learning's most prolific examiners and conducted three significant reviews of transformative learning theory. In the first review, Taylor examined 39 individual empirical studies that applied Mezirow's theory over a two-decade period. Of the 39 studies, Taylor noted that only three were published and peer reviewed, marking the remaining 36 as unusable from an academic standard. Accordingly, Taylor pressed his concern that the lack of published works was unraveling transformational theory as an unviable learning lens. According to Taylor, "Mezirow's model was not inclusive of all the essential aspects inherent in the process of a perspective transformation" and that there was a far greater need for "a more holistic and contextually grounded view of transformative learning in adulthood" (Taylor, 1997, p. 35). He defined holistic as including, "(a) the interdependence between feelings and critical reflection, (b) the role of unconscious knowing, (c) the importance of relationships in fostering transformative learning and enabling critical reflection, and (d) a transcendence beyond the self to a 590 Journal of Education 202(4) transpersonal level" (Taylor, 1997, p. 35).

Unsatisfied by the responses to his first critical reflection of Mezirow's work, Taylor (1998) followed up a year later with a second literature review to address further issues with transformational learning. Taylor proclaimed seven "unresolved" problems with the theory,

which included, "individual change versus social action, decontextualized view of learning, universal model of adult learning, adult development—shift or progression, rationality, other ways of knowing, and the model of perspective transformation" (p. vii). Rather than abolish transformational learning because of its shortcomings, however, Taylor introduced two other theories to complement Mezirow's theory: Boyd's process of individuation, based in Jung's work, and Freire's model of emancipatory transformation. Taylor insisted that an individual gains compassion for others and the society in which they live via transformational learning, which is Boyd's process of a person's development from the unconscious to conscious awareness (Taylor, 1997). Further, a person undergoing transformational learning may realize ways in which an environment is constraining the individual who then can take action to change their situation (Taylor, 1997). This concept relates to Freire's model that is focused on social transformation, though the researcher found this addition a bit of a stretch.

Nearly 10 years later, Taylor (2007) conducted a third review of transformative learning theory as described in 40 peer-reviewed articles published from 1999 to 2005. Though pleased with the expansion of scholarly work pertaining to transformative learning theory, Taylor remained unsatisfied, noting, "The recognition that epistemological change among some participants was not adequate for transformation to reach fruition" (p. 186). Specifically, Taylor argued that there was still a need for research that offers educators clarity on how to teach toward transformational learning and its profound implications on the learner, how educators can teach with "transformative intent," how educators could navigate the relationship between teacher and student, and how culture and context greatly influence the potential and outcomes of transformational learning. One finding was, however, apparent in this third review: transformational learning was indeed not a linear nor step-by-step process as Mezirow outlined

(Taylor, 2007). Other peers of Taylor found transformational learning to be "spiral-like," "fluid,"
evolving, and dynamic (Cranton, 2002). In the next section of this literature review, the
researcher "picks up the baton" from Taylor's last literature review and details several themes
that have emerged since 2005 with the exception of one work.

The Disorienting Dilemma

A number of scholarly articles focusing on the disorienting dilemma have emerged in the
last two decades. The researcher reviewed more than 60 peer-reviewed articles, studies, and
published talks focused on the disorienting dilemma and selected 29 for this literature review
because of their prominent attention to the disorienting dilemma. This section contains a
synthesis of 29 works into five major themes as shown in Table 3, including the year, title,
theme, and author of each work covered in this section. Table 3 is ordered by publication date.
After a discussion of each theme, a summary concludes this section, which also includes an
introduction of the influences and other learning theories related to the disorienting dilemma.

Table 3

Selected Scholarly Articles on Disorienting Dilemma

Year	Title	Theme	Author
1995	Transcultural mentoring: An experience in perspective transformation	The disorienting dilemma as a group experience	Morales-Mann & Higuchi
2000	Academic staff development from a transformational learning perspective	The disorienting dilemma as a group experience	Gravett & Petersen
2001	Transformatoriese leer by skoolhoofde	The disorienting dilemma as a group experience	Gravett & Barkhuizen

Year	Title	Theme	Author
2005	Souls on ice: Incorporating emotion in web-based education	Emotions matter in the disorienting dilemma	MacFadden
2006	Collaborative Inquiry as a framework for exploring transformative learning online	Impact of the disorienting dilemma on students	Amber et al
2007	The forgotten dimension in learning: Incorporating emotion into web-based education	Emotions matter in the disorienting dilemma	MacFadden
2008	Celebrating disorienting dilemmas: Reflections from the rearview mirror	Teachers' reflections and experience of the disorienting dilemma while teaching students	Clark
2009	The Disorienting Dilemma: The senior capstone as a transformative experience	Impact of the disorienting dilemma on students	Sill et al
2009	Using the disorienting dilemma to promote transformative learning	Impact of the disorienting dilemma on students	Herbers & Mullins Nelson
2012	Collective disorienting dilemma: a "wikid" approach to fostering adult learning	The disorienting dilemma as a group experience	Hunter
2012	Rethinking disorienting dilemmas within real-life crises the role of reflection in negotiating emotionally chaotic experiences	Emotions matter in the disorienting dilemma	Malkki
2015	Instilling a sustainability ethos in accounting education through the transformative learning pedagogy: A learning case study	Emotions matter in the disorienting dilemma	Saravanamuth namuthu

Year	Title	Theme	Author
2015	Teaching for Engagement: Part 2: Technology in the service of active learning	The disorienting dilemma as a group experience	Hunter
2016	Creating activating events for transformative learning in a prison classroom	Impact of the disorienting dilemma on students	Keen & Woods
2018	Disorienting dilemmas - the significance of resistance and disturbance in an intercultural program within kindergarten teacher education	Emotions matter in the disorienting dilemma	Birkeland & Ødemotland
2019	Transformative learning in community college human geography: A mixed methods study	Impact of the disorienting dilemma on students	Jones & Walker
2020	Students' perception of interventions designed to foster empathy: An integrative Review	Emotions matter in the disorienting dilemma	Engbers
2020	Swiss regional nature parks: Sustainable rural and mountain development and the disorienting dilemma through transformative learning?	Unique applications and results for transformational learning	Hunziker & Hofstetter
2020	Using transformative learning theory to help prospective teachers learn mathematics that they already "know"	Teachers' reflections and experience of the disorienting dilemma while teaching students	Kim & Dana
2020	Using transformative learning theory to understand outdoor adventure education	Unique applications and results for transformational learning and the disorienting dilemma	Meerts Brandsma et al.

Year	Title	Theme	Author
2021	Developing and testing transformative travel scale	Unique applications and results for transformational learning and the disorienting dilemma	Soulard et. al
2021	Illuminating transformative learning/assessment: Infusing creativity, reciprocity and care into higher education	The disorienting dilemma as a group experience	Acheson et. al
2021	Power to the facilitated agricultural dialogue: An analysis of on-farm and demonstrations spaces	Unique applications and results for transformational learning and the disorienting dilemma	Cooreman et al.
2022	A disorienting dilemma: Teaching and learning in technology education during a time of crisis	Teachers' reflections and experience of the disorienting dilemma while teaching students	Code et al.
2022	Enabling the exploration of disorienting dilemma in the classroom	Teachers' reflections and experience of the disorienting dilemma while teaching students	DeAngelis
2022	Residents' reflections on cost-conscious care after international health electives: A single-center qualitative study	Emotions matter in the disorienting dilemma	Matchett et al.

Theme 1: Impact of the Disorienting Dilemma on Students

A dominant theme that emerged from the set of scholarly work pertaining to disorienting

dilemmas pertained to adult students' experiences. All adult students studied in this set of

scholarly articles were in graduate and advanced degree programs across various disciplines. This section focuses on five pieces of works and their implications of the disorienting dilemma.

Two studies centered on college experiences and transformational learning experiences for students in higher education. Sill et al. (2009) studied the merits of the "senior capstone" at Southern Illinois University Edwardsville and asserted that the students' projects spurred moments of the disorienting dilemma and eventual transformational learning. The senior capstones were not mere projects but rather involved a requirement for students to showcase their knowledge with integration, breadth, application, and transition to the "real world," which by "changing the way of knowing, can be discomforting" (Sill et al., 2009, p. 50).

In a community college setting, Jones and Walker (2019) used a mixed-method approach to understand how students experienced transformational learning and the disorienting dilemma in an eight-week human geography course. Using the eight-scale Transformative Learning Environments Survey, Jones and Walker found statistically significant results that showed that their qualitative data were related to transformational learning: most students responded "that they had adopted new ways of thinking," a hallmark of transformational learning. Students' qualitative comments included, "I was certainly not narrow minded before taking this course, but I believe I was naïve to some major topics and issues of culture" and "my world is the size of a pinhead and I only hope to expand it as time wears on" (Jones & Walker, 2019, p. 462). In contrast, Jones and Walker (2019) noted that the Transformative Learning Environments Survey revealed the disorienting dilemma did not occur and "was perceived the lowest – only sometimes occurring ($M = 3.10$)," (p. 463). Jones and Walker believed that the instructor's application of the disorienting dilemma only happened "sometimes," at least as reported by students, but curiously, student satisfaction of the course was statistically significant. Jones and Walker

concluded that transformational learning occurred in this eight-week course, but students' *beliefs* that disorienting dilemmas occurred were weak.

The three remaining pieces of scholarly literature related to the theme of the student experience of the disorienting dilemma occurred in less formal or traditional settings: prison, online, and abroad. In a qualitative study, Keen and Woods (2016) analyzed the "success" of 13 instructors in prisons scattered throughout the northeastern region of the United States. The results revealed that "all the 13 educators perceived they had witnessed at least one inmate student undergo a transformative process," and evidence of "educators' perceptions of inmate students' transformative learning facilitated by disorienting dilemmas and activating events; altered perspectives; revised frames of reference; and instrumental, dialogic, and self-reflective types of learning" (Keen & Woods, 2016, p. 26). In another qualitative study, Amber et al. (2006) explored the possibility of transformational learning and the disorienting dilemma in a full-time, online master's degree curriculum in human and organizational transformation offered by the California Institute of Integral Studies. The seven students studied "demonstrated the power of transformative learning in a group that had dynamics that created an opening for collaboration, support, and challenge" (Amber et al., 2006, p. 329). Further, the disorienting dilemmas the students felt increased "self-confidence" and "trust" within each person and for one another (Amber et al., 2006). Lastly, Herbers and Mullins Nelson (2009) used study abroad experiences, in addition to field trips and service-learning experiences, to assess transformational learning for students in a graduate program. The qualitative results demonstrated disorienting dilemmas can "prompt" students and teachers to reflect on assumptions that guide deeper self-understanding and increased awareness of one another's cultures (Herbers & Mullins Nelson, 2009).

Theme 2: Teachers' Reflections and Experience of the Disorienting Dilemma While Teaching Students

The second theme uncovered in the literature review pertaining to the disorienting dilemma was surprising to the researcher: how the disorienting dilemma occurred to teachers who were instructing and guiding their students. In this section, the researcher first reviews two works with first-person narratives from educators themselves. Then, two academic works with descriptions of the use of transformational learning and the disorienting dilemma on teachers themselves are analyzed.

DeAngelis (2022) and Clark (2008) both contribute to the literature on transformational learning and the disorienting dilemma by unfurling their own positions as teachers. Clark, a teaching professor of adult education at the University of Missouri-St. Louis, "celebrated" the turmoil disorienting dilemmas often poise and embraces future ones. She described, "I am off now to allow myself to celebrate another round of disorienting dilemmas which was initiated when my adult daughter announced four years ago, 'I'm going to have a baby'. Her announcement ushered in a new round of disorienting dilemmas and a new life event ... that being ... in becoming a grandmother" (Clark, 2008, p. 47). Clark's piece nudges educators to value and explore the merits of disorienting dilemmas and their associations with the practice of teaching. "My takeaway reflections from my rear-view mirror is that experience informs learning, learning informs philosophical beliefs, and philosophical beliefs informs practice" Clark (2008, p. 48) remarked.

Likewise, DeAngelis explored how learning connects to the art of teaching and her role in it, asserting that the teacher's role in the process of transformational learning is completely undertheorized. In her paper, she sought to answer the question, "How transformative teaching

enables the exploration of disorienting dilemmas" (DeAngelis, 2022, p. 585). She concluded that teachers best suited to create transformational learning experiences by sparking disorienting dilemmas recognize that first, students enter their classroom with their own lived experiences; as educators, they must be attentive to how transformative teaching encourages students to become critically reflexive; and finally, transformative teaching embraces transformative learning happens "outside the comfort zone" (DeAngelis, 2022). Like Clark, DeAngelis is a proponent of the disorienting dilemma, transformational learning, and the power educators have in creating such learning environments for students.

In contrast to Clark (2008) and DeAngelis (2022), two works by Code et al. (2022) and K. Johnson and Olanoff (2020) showed the struggle and conflict of transformational learning and the disorienting dilemma when applied to teachers. Prospective teachers, K. Johnson and Olanoff (2020) first explained, often assume they "know" all the mathematics required to do their jobs. Mathematics teacher educators are required to teach prospective teachers and typically struggle with the challenge of instructing adults who are ironically resistant to learning (K. Johnson & Olanoff, 2020). Using disorienting dilemmas and the framework of transformational learning, however, mathematics teacher educators can become more successful because disorienting dilemmas jolt adults into becoming curious and present (K. Johnson & Olanoff, 2020). In another academic work reviewing the discomfort of the disorienting dilemmas, Adedoyin and Soykan (2020) cautioned the effectiveness of learning when the COVID-19 pandemic occurred. As teachers had to shift to online teaching through screens, a forced disorienting dilemma erupted (Adedoyin & Soykan, 2020). Adedoyin and Soykan admitted that it is too early to determine how positive or negative this disorienting dilemma was and whether the COVID-19 pandemic created a positive transformational learning experience for teachers or students.

Theme 3: The Disorienting Dilemma as a Group Experience

The third theme that surfaced in the researcher's review of the scholarly literature related to transformational learning and the disorienting dilemma was how a group could collectively experience both transformational learning and the disorienting dilemma. This section includes a review of five academic works that pertain to a group's experience of both phenomena. In addition, the meaning of transformational learning and the disorienting dilemma as a group experience is discussed.

The first two academic works relate to technology's impact on groups and groups' perceptions of technology as a transformational learning tool or a disorienting dilemma within itself. Hunter (2012) described "a kind of collective 'disorienting dilemma'" when graduate students were instructed to build a wiki, a web-based tool that can be used by groups to work collaboratively, because it forced students, as a group, to completely rethink their beliefs around how course content could be enhanced by technology rather than harmed (para. 11). He asserted, "Media and technology are shaping our understanding of what it means to be learned" and technology has the opportunity to contribute to collective learning in connected, online environments, despite students' discomfort (Hunter, 2012, para. 17). In a later work, Hunter (2015) espoused the benefits of problem-based learning, which requires group participation and can be enhanced by technology. For instance, despite the disorienting dilemmas students may encounter with "new" technology, a group of student doctors may better learn about a patient via computer simulations, large-scale 3D simulated worlds, videos, and more (Hunter, 2015).

Three more works pertain to groups' collective transformational learning and disorienting dilemmas within the realms of nursing, school management, and mentoring programs. In South Africa, Moloi et al. researched nursing educators' experience of required staff development

(2009). Though staff developers attempted to make the new curriculum be centered on a transformational learning experience, the nursing educators reported the new teaching materials as "difficult" (Moloi et al., 2009). The nurses rated the staff development process positively, leading Moloi et al. to surmise that though a disorienting dilemma such as new teaching materials may be viewed unfavorably, the outcome of the entire learning experience, the staff development in this case, may be seen as positive overall (Moloi et al., 2009). Gravett and Barkhuizen (2001) arrived at a similar finding in another study with South African school principals in a changing socio-cultural context. Gravett and Barkhuizen noted school principals, as a group, were unhappily challenged by an ever-evolving social environment in post-apartheid South Africa, but were able to transform their perspectives. The principals collectively confronted a disorienting dilemma, managed various reactions, explored new roles, and finally integrated their new perspectives into their lives (Gravett & Barkhuizen, 2001). The results of their collective transformational learning and confrontation with the disorienting dilemma of a complex socio-economic environment were "linked to a sense of increased personal empowerment as well as to a belief that the changes were in line with their religious beliefs and that the changes would be beneficial to their cultural group" (Gravett & Barkhuizen, 2001, p. 64).

Finally, in the realm of mentoring, Morales-Mann and Higuchi observed the perspective transformation between Chinese nurses and Canadian nursing professors (1995). The mentors, the Canadian nursing professors, collectively experienced a "culture shock" and disorienting dilemma in mentoring the Chinese nurses (Morales-Mann & Higuchi, 1995). Morales-Mann and Higuchi concluded that cross cultural learning experiences could be aided by following

Mezirow's adult learning theory of perspective transformation to aid in the acceptance of the disorienting dilemma as a positive component to learning.

Theme 4: Emotions Matter in the Disorienting Dilemma

The fourth theme exposed in the literature review was the emotional aspects of transformational learning and particularly, the disorienting dilemma. The researcher noticed how often most works wholly excluded a discussion of emotional components of transformational learning. Some academic works about transformational learning and the disorienting dilemma, however, emphasized and studied emotions. This section includes a review of six scholarly articles centered on emotion regarding transformational learning and disorienting dilemmas.

The first two works address the tension between rationality and the experience of a disorienting dilemma. Saravanamuthu (2015) offered a case study of accounting students grappling with "accounting's economic rationalism with sustainability's ecological resilience" (p. 2). In this qualitative study, accounting students were encouraged to use their emotional intelligence to critically evaluate accounting's financial rigidity, which does not often account for sustainability and its merits (Saravanamuthu, 2015). Through interviews, Saravanamuthu found that half of the accounting students (five of the 10) reconsidered their "existing moral consciousness and professional identities," whereas the remaining students were unchanged in their thinking (p. 34). Transformational learning, when applied, does not always prevail in changing all students, Saravanamuthu concluded. Matchett et al. (2022) arrived at a similar finding in their multi-year study related to cost-cutting measures at the Mayo International Health Program. Participants in the study reflected on cost transparency, resource stewardship, and reduced fear of litigation throughout trainings advocating high-value, cost-conscious care (Matchett et al., 2022). A disorienting dilemma emerged, as participants had to confront beliefs

of "care at all cost" for patients with the new information presented in the high-value, cost-conscious care training (Matchett et al., 2022). Ultimately, the study's participants revealed the value of transformational learning with new approaches to cost-aware practice, drug administration, and reliance on clinical skills (Matchett et al., 2022).

As a departure from rationality's role in the disorienting dilemma, two other researchers noted that anger, remorse, and resentment can emerge in transformational learning and the disorienting dilemma. Malkki (2012) argued that disorienting dilemmas are "manifested in various emotional experiences, indicating that one's relation to these emotions—as opposed to the nature of the emotion—becomes essential with regard to triggering reflection" (p. 214). Malkki conducted interviews with involuntarily childless women dealing with a "life crisis," which further revealed that nonfacilitated reflection as opposed to more structured, typically facilitated reflection, may be best for people processing a disorienting dilemma. Birkeland and Ødemotland (2018) agreed with a less structured approach to self-reflection. In their study of Norwegian teachers overseeing an ever-increasing multicultural kindergarten student body, Birkeland and Ødemotland noted that questioning beliefs and tenets includes a deeper examination of one's emotional experiences, values, and perspectives that can "threaten one's core beliefs and create powerful feelings such as anger, shame, or resentment" (p. 2). Birkeland and Ødemotland advocated for other institutions that are challenged by increased student diversity to reject a "rationale" approach to disorienting dilemma and instead "focus on intercultural experiences as sensuous, intellectual, and affective" (p. 2).

In two final scholarly works, the researchers adamantly insist on acknowledging more emotion in transformational learning and the disorienting dilemma. In nursing, for instance, empathy is a needed asset of nurses (Engbers, 2020). How nursing programs teach empathy,

however, is a daunting task, but "immersive simulations" that force students in roles of the "other" are notably impactful, especially if the role-plays create a disorienting dilemma followed by facilitated reflection (Engbers, 2020). Engbers (2020) believed that though the definition of empathy within nursing is still incomplete, the results of study indicated that nursing students are transforming their beliefs of empathy through educational interventions. MacFadden (2005) also advocated for emotion-focused learning and introduced a constructivist, emotionally oriented model of web-based education in a provocatively titled article, "Souls on ice: Incorporating emotion in web-based education." The model highlights safety, challenge, new thinking, and consolidation needed for web-based learners (MacFadden, 2005). MacFadden concluded with a quote from the American neuroscientist, Joseph LeDoux, who argued that cognitive science regrettably only focuses on thinking, reasoning, and intellect. As LeDoux (1996) insisted, "It leaves emotions out. And minds without emotions are not really minds at all. They are souls on ice–cold, lifeless creatures devoid of any desires, fear, sorrow, pains, and pleasure" (p. 44). Emotions should be part of learning, particularly in transformational learning.

Theme 5: Unique Applications and Results for Transformational Learning and the Disorienting Dilemma

The final theme from the literature review unveiled some atypical applications of transformational learning and the disorienting dilemma. From Swiss regional nature parks to farms, travel to outdoor adventure education, this section of the literature review showed remarkable uses and findings of transformational learning and disorienting dilemmas in environments outside of traditional classrooms. In the first two scholarly works, the researchers used disorienting dilemmas as tools of influence whereas the other two academic studies extended disorienting dilemmas to travel and National Outdoor Leadership Schools.

Shifting perspectives about sustainability were the dominant objectives in the studies by Hunziker and Hofstetter (2020) and Cooreman et al. (2021). Hunziker and Hofstetter questioned how the application of a disorienting dilemma could ignite transformational learning related to the sustainability efforts of Swiss regional nature parks. By exploring the feeling of "emptiness" without the parks' presence, Hunziker and Hofstetter found that local residents could foster attachment development and be more engaged with preserving the natural environment. Though Hunziker and Hofstetter celebrated the findings as a blueprint for other conservation efforts, they cautioned that attachment development requires "enough time and openness for processes and results" (p. 9). Cooreman et al. (2021) were also cautiously optimistic about their findings with farmers and the use of on-farm demonstrations to spur greater attention for sustainable farming practices. The mixed-method study revealed that in on-farm demonstrations that triggered surprise (a disorienting dilemma) and that were accompanied by facilitated self-reflection, far more perspective shifting occurred (Cooreman et al., 2021). This perspective shifting was measured a year and half later via the buying decisions of the farmers who were deciding on sustainable and less sustainable products (Cooreman et al., 2021). Through thoughtfully created disorienting dilemmas, both locals close to Swiss regional nature parks and farmers were changed.

More naturally, just the act of travel or being outdoors has the ability to create disorienting dilemmas. Soulard et al. (2021) created the Transformative Travel Experience Scale to measure the extent of travelers' abilities to "self-reflect, question their assumptions, and develop a more tolerant worldview" due to travel. The four-dimensional scale considers local residents and culture, self-assurance, a traveler's disorienting dilemma, and the joy the traveler experiences during a transformative travel experience (Soulard et al., 2021). Meerts-Brandsma et

al. (2020) did not develop a scale as Soulard et al. did but also found disorienting dilemmas to be a critical factor in outdoor adventure education. The qualitative research concluded with two findings: first, OAE can be a catalyst for transformational learning but it depends on whether a student believes a disorienting dilemma has occurred. Second, outdoor adventure education must challenge students and provide a supportive environment and time for reflection to achieve transformational learning (Meerts-Brandsma et al., 2020).

Summary of the Five Themes of Disorienting Dilemmas

From the dozens of scholarly articles and works reviewed, five major themes surfaced and are summarized in Table 4. The first theme, unsurprisingly, showed the importance and impact of the disorienting dilemma on students. The second theme, however, addressed the experiences of teachers and their disorienting dilemmas while teaching. The third theme centered on disorienting dilemma as a potential group phenomenon. The fourth theme was the presence and power of emotion in the disorienting dilemma. Lastly, the fifth theme uncovered the wide applications of transformational learning and the disorienting dilemma in fields such as sustainability and travel. In the next section of this literature review, the researcher analyzes the influences of the disorienting dilemma and its relevance to other learning theories.

Table 4

Summary of Themes From an Analysis of 29 Selected Works

Themes
Impact of the disorienting dilemma on students
Teachers' reflections and experience of the disorienting dilemma while teaching students
The disorienting dilemma as a group experience Emotions matter in the disorienting dilemma
Unique applications and results for transformational learning and the disorienting dilemma

Influences and Other Learning Theories Related to the Disorienting Dilemma

Based on the review, the disorienting dilemma did not appear in Mezirow's transformational learning theory without prior influences and has not been identified in only transformational learning. Though the wording differs, "disorienting dilemmas" are within other learning theories and were the subject of investigations before Mezirow's work. In this section of the literature review, the researcher first examines the vast influences of transformational learning theory and its disorienting dilemma and then explores other learning theories that use disorientation, confusion, and quandaries.

Before Mezirow published his work on transformational learning, which included the first step of the disorienting dilemma, he spent years absorbing the research and frameworks of five major theorists. These diverse and notable theorists are important to note as the multitude of applications for transformational learning and how disorientation pertains to learning and transformation is far reaching. Few of Mezirow's influences pertain to "education" directly, though John Dewey had one of the most prominent influence on Mezirow's ideas.

In *Experience and Education*, Dewey (1938) purported, "the child and the curriculum are simply two limits which define a single process. Just as two points define a straight line, so the present standpoint of the child and the facts and truths of studies define instruction" (p. 16). Both "points" between child and information made Dewey an advocate of constructivism, an approach to learning that maintains people actively construct or make their own individual knowledge and its reality is determined by the experiences of the learner directly (Elliott et al., 2000). Mezirow was intrigued by Dewey's (1938) insistence that education was "a process of living and not a preparation for future living" (p. 17), and named Chapter 2 of *Experience and Education* "The Need of a Theory of Experience."

Another theorist who came from the education field and influenced Mezirow's work was Paulo Freire, a pedagogue, educational, and social theorist. In 1970, Freire, in *Pedagogy of the Oppressed*, asserted that the concept of a "cycle of critical consciousness," is an awareness of one's social reality through reflection and action developed in three steps. Gaining knowledge about the systems and structures that spur and promote inequity is the first step of "critical analysis" (Freire, 1970). The second step, a "sense of agency," requires one to develop a sense of power or capability (Freire, 1970). The last step of Freire's cycle of critical consciousness is commitment to take action against the oppressive state, or "critical action" (Freire, 1970). Regarding the final step of action and "conversion," Freire (1970, p. 4) noted that it is "so radical as not to allow of ambiguous behavior." It requires "a profound rebirth" and those who undergo it must take on a new form of existence; they can no longer remain as they were (Freire, 1970, p. 4). Such critical reflection, action, and a permanent transformation in Freire's framework are akin to Mezirow's transformational learning theory.

Though Dewey and Freire's work centered on education frameworks, other theorists who influenced Mezirow did not come from education per se. Thomas Kuhn was a physicist, philosopher, and historian who published a groundbreaking book for scientists in 1962, *The Structure of Scientific Revolutions*. He touted two versions of "scientific change" (Kuhn, 1962). The first form of change was small and incremental, developed often over prolonged periods of time, which Kuhn described as "normal science" (Kuhn, 1962). The second kind of change was massive and sudden, which Kuhn dubbed as, "paradigm shifts," (Kuhn, 1962). Kuhn defined paradigm shifts as, "an important change that happens when the usual way of thinking about or doing something is replaced by a new and different way" (Kuhn, 1962). Kuhn's "paradigm shift" definition is certainly similar to Mezirow's description of transformational learning, "a process

of making a new or revised interpretation of the meaning of an experience which guides subsequent understanding, appreciation, and action" (Mezirow, 1990, p. 1).

Like Kuhn, Blumer was not an educational theorist, but he impacted Mezirow's theory of transformational learning and its first step, the disorienting dilemma. Blumer (1969), an interpretive sociologist and major contributor to the fields of sociology and social psychology, argued that the theory of symbolic interactionism, the concept that means that people play an active role in constructing their version of their own and distinct reality. Blumer suggested three tenets of symbolic interactionism. First, individuals develop their own attitudes and judgments about objects according to the meanings objects propose to each individual. Second, the meanings individuals prescribe to objects are formed from the "interaction of one of them from its addressees" (Blumer, 1969, p. 56). Third, meanings change and develop as individuals change or interact with the objects. Blumer concluded that no object holds innate meaning; rather, the meaning of objects is solely dependent on each individual's interaction and experience with an object. The disorienting dilemma, such as a "good" or "bad" meaning of an object according to symbolic interactionism, is at the sole discretion of an individual.

The last significant work that influenced Mezirow's theory of transformational learning and the disorienting dilemma also came from psychology. Roger Gould (1979), a psychiatrist, proposed a stage theory of transformations that begin in the adolescent years and continue until mid-life. According to Gould, psychological growth occurs in the space between two opposing pulls. The first, the urge to grow, mature, and adapt, is at odds with the second pull experienced by all humans, which is the need to be safe and sheltered (Gould, 1979). An individual will take action and risk safety when an external or internal pressure demands it and grow accordingly (Gould, 1979). If the individual refuses to take action, however, "psychological pain" develops

as "a consequence of being stuck" (Gould, 1979, p. 58). This "psychological pain" is similar to what Mezirow described in the disorienting dilemma. Taylor (2000) stated that the disorienting dilemma "denotes a life crisis that triggers a questioning of assumptions, resulting in transformed beliefs" (p. 269).

Many academics and theorists had significant impact on Mezirow as he constructed transformational learning theory and its 10 steps, including the first one, the disorienting dilemma. Dewey, Freire, Kuhn, Blumer, and Gould, each from distinct lens and academic constructs, collectively contributed to Mezirow's thinking. In the second portion of this literature review section, the researcher considers four other learning theories and models related to transformational learning and the notion of disorienting dilemmas.

Zone of Proximal Development (ZPD)

The first learning concept that relates to transformational learning and the disorienting dilemma comes from psychologist Lev Vygotsky. Vygotsky (1978) contributed two major themes to learning literature: the ZPD and inner speech. The ZPD, Vygotsky argued, is the area in which a child can learn and achieve with the help and guidance of a skilled partner, referred to as a "more knowledgeable other." Only through working, collaborating, and talking with a more knowledgeable other a child can learn to their full potential (Vygotsky, 1978). Though Vygotsky focused mainly on children and transformational learning theory relates to adult learning, Mezirow's steps encompass input from others as part of the learning process. In particular, Step 4, recognition of shared experiences, requires a learner to acknowledge that the experience unfolding before them has been experienced by others previously or is in tandem with the learner (Mezirow, 1978a).

In addition to contributing to the ZPD, Vygotsky was an advocate of the power of language and its ability to shape learning, which has ties to transformational learning and even the disorienting dilemma (Vygotsky, 1978). Vygotsky has been cited as the first psychologist to discuss the importance of "private speech," one of three realms of speech and language Vygotsky defined. Private speech is directed to the self and is overt, often aiding in the function of learning. Children around the age of 3 tend to exhibit private speech. Private speech is different from social speech, language exchanged between two or more people, and inner speech, the silent conversation that happens within the mind of the learner, usually past the age of 7.

As Mezirow (1978a) pointed out, much of transformational learning is an inward experience, even the impetus for transformational learning. He described two forms of the disorienting dilemma: "Two types [of dilemma] can be distinguished. One is an external event—the death of a husband, divorce, loss of a job, moving to a new city. The other is an internal, subjective experience—the feeling that life is not fulfilling, a sense of deprivation, the conviction that being only a housewife forecloses access to other rewarding experiences," (Mezirow, 1978a, p. 13). Mezirow suggested that an individual may be undergoing a transformational experience internally without expressing any external speech or words to others, what Vygotsky described as social speech. Judith et al. (2017) expanded on the concept of inner speech in transformational learning with "self-compassion" which is, "an internal compassionate voice that can comfort and affirm us when we negatively judge ourselves during transformation" (p. 154)

Bridges' Transition Model

In addition to Vygotsky and his exploration of internal dialogue that occurs within learners, Bridges' transition model is highly relevant to transformational learning and is an inner process. Transition, unlike change, which Bridges stressed, is the inner psychological process

that an individual internalizes to understand the impact of a transition (1986). Bridges' transition model comprises three distinct stages: the ending, the neutral zone and finally, new beginnings. The ending requires the individual to confront the conclusion of something that once was and "learn" to embrace the transition unfolding (Bridges, 1986). The neutral zone stage includes "critical psychological realignments" as an individual adapts to new patterns and processes, often with confusion, distress, and defiance (Bridges, 1986). Lastly, in new beginnings, an individual adjusts to new "understandings, values, and attitudes," (Bridges, 1986).

Bridges' (1986) three phases are markedly similar to many steps within transformational learning. The ending phase, marked by the mourning of something that once existed, is similar to the disorienting dilemma. Mezirow (1978a) elaborated, "these disorienting dilemmas of adulthood can disassociate one from long-established modes of living and bring into sharp focus questions of identity, of the meaning and direction of one's life" (p. 12). Bridges' next phase, the neutral zone, described as a psychological adjustment, is similar to Steps 2 and 3 of transformational learning, self-examination and critical assessment, which Mezirow (1991b, p. 168) detailed as "a critical assessment of their epistemic, socio-cultural, or psychic assumptions." Finally, Bridges' "new beginnings" phase is interchangeable with the last step of transformational learning, reintegration. Similar to the shift an individual makes in Bridge's final phase, a learner in the last step of transformational learning emerges with a "fresh perspective" on life after transforming (Mezirow, 1991b).

Kolb's Experiential Learning

A third theory related to transformational learning and the disorienting dilemma is Kolb's (1984) experiential learning. Similar to Mezirow, Kolb believed that learning was a transformation, stating, "Learning is the process whereby knowledge is created through the

transformation of experience," (Kolb, 1984, p. 38). Unlike Mezirow, Kolb distinguished four learning styles that unfold within a four-stage learning process. The first step entails a specific experience, what Kolb described as a concrete experience that is new and novel to the learning. The next stage, reflective observation of the new experience, requires the learner to consider the new knowledge and how it conflicts or complements current knowledge (Kolb, 1984). Next, the learner relies on abstract conceptualization, a period when the learner adjusts and fits the new knowledge into the current modes of thinking or understanding (Kolb, 1984). Lastly, the learner engages in active experimentation (Kolb, 1984). At this final phase, the learner "tries out" the new idea or knowledge in the environment (Kolb, 1984).

All four of Kolb's stages are similar to Mezirow's 10 steps of transformational learning. Step 1 of transformational learning, the disorienting dilemma, is particularly similar to Kolb's "concrete experience." Mezirow's disorienting dilemma is a specific and distinct moment or period, often described as an experience. Self-examination and critical assessment, Steps 2 and 3 of transformational learning, respectively, are similar to Kolb's Stage 2, reflective observation (Kolb, 1984). Kolb's last two phases, abstract conceptualization and active experimentation, are both embedded in Mezirow's final steps, including Step 8, trying new roles, and Step 10, reintegration. Though all of Kolb's phases are consistent with Mezirow's steps in learning, Kolb's introduction of learning styles offers a new perspective on how transformational learning could unfold.

In addition to the four phases of learning, Kolb insisted four learning styles exist that integrate with the learning phases depending on the learner (Kolb et al., 1984). Unlike Mezirow, Kolb believed that people are different and learn differently based on their social environments, educational levels, or cognitive structures (Kolb et al., 1984). Kolb's four learning styles include

diverging (learners who feel and watch), assimilating (learners who think and watch), converging (learners who think and do), and accommodating (learners who feel and do). The distinction of learning styles and preferences, as mentioned earlier in this chapter, were one of the critiques of Mezirow's theory, which does not accommodate for differences in learners (Taylor, 2007).

King's Learning Activities Survey

The fourth model directly related to transformational learning and the disorienting dilemma is King's Learning Activities Survey (LAS; King, 1997), a well-regarded instrument used in higher education environments. King (1997) developed LAS to determine "whether adult learners have had a perspective transformation in relation to their educational experience; and if so, determining what learning activities have contributed to it" (p. 24). Four sections comprise the LAS: Part 1 is used to determine the states of perspective transformation, Part 2 allows learners to report the learning experience that aided in their perspective shift, Part 3 gauges the learning activities used by the learners, and Part 4 requires demographic information (King, 1997). The LAS, which has been further refined and tested by King and others in education to increase its reliability, remains a rare qualitative instrument for measuring transformational learning (Gall et al., 2007).

In this section of the literature review, the researcher considered the influences of transformational learning and the disorienting dilemma as well as other learning theories and models that are related to Mezirow's transformational learning theory. Dewey's *Experience and Education*, Freire's cycle of critical consciousness, Kuhn's "scientific change," Blumer's symbolic interactionism, and Gould's stage theory of transformations each impacted Mezirow's conceptualization of transformational learning theory. In addition, Vygotsky's ZPD, Bridge's transition model, Kolb's experiential learning, and King's LAS are meaningful concepts related

to the disorienting dilemma and transformational learning. The final section of this literature review includes a review of a major research contribution to disorienting dilemmas. The various influences of transformational learning theory are presented in Table 5.

Table 5

Summary of Influences on the Conceptualization of Transformational Learning Theory and Related Models to the Disorienting Dilemma and Transformational Learning

Influences	Related models
- Dewey's *Experience and Education* - Freire's cycle of critical consciousness - Kuhn's "scientific change" - Blumer's symbolic interactionism - Gould's stage theory of transformations	- Vygotsky's Zone of Proximal Development Bridge's transition model - Kolb's experiential learning - King's Learning Activities Survey

The Disorienting Index

In 2019, Ensign created a "disorienting index" after analyzing 82 scholarly articles pertaining to the disorienting dilemma. Ensign sought to answer the research question, "How do scholars conceptualize the disorienting experience in the transformative learning literature?" (p. 6). Ensign's qualitative descriptive study is significant as it established the first categorization and dimensions of disorienting dilemmas, uncovered from the dataset of the scholarly articles. Though the Disorienting Index has not been peer reviewed or published as of this writing, the researcher included the index because it is the most comprehensive and pointed review of the disorienting dilemma to date.

Ensign (2019) made three main findings after her review of the scholarly literature. First, she determined common themes among the literature, which spurred the creation of the Disorienting Index (Ensign, 2019). Second, Ensign proposed 16 contexts in which the disorienting dilemma occurs per the research to date. Lastly, Ensign suggested a definition for

each dimension of the Disorienting Index to further support the understanding of disorienting dilemmas.

The first and main finding of Ensign's (2019) work is that the Disorienting Index "provides attributes of the disorienting experience and a common language to describe these dimensions" (p. 123). From the data set and her analysis, Ensign created 16 categories and eight dimensions to explain disorienting dilemmas. The categories and their frequencies are shown in Table 6.

Table 6

The Disorientation Index

Dimensions	Categories	Frequency (*N* = 82)	Point Spread
1. Acuteness	A. Acute or epochal B. Not acute or epochal	84% 16%	68
2. Seclusion	A. Alone B. Not Alone	79% 21%	58
3. Origin	A. Externally Generated B. Internally Generated	78% 22%	56
4. Familiarity	A. No prior experience B. Prior experience	77% 23%	54
5. Affect	A. Negative effect B. Not negative effect	72% 28%	44
6. Setting	A. Not an educational setting B. Educational setting	66% 34%	32
7. Place	A. Not new location B. New location	60% 40%	20
8. Locus of Control	A. Voluntary B. Involuntary	55% 45%	10

The research and subsequent coding from the 82 scholarly articles indicated that disorienting dilemmas were most commonly acute or a "one-time" occurrence, experienced alone, externally generated, not familiar to the subject, negatively experienced, not within an educational setting, and not within a "new" setting (Ensign, 2019). Just more than half of the disorienting dilemmas reviewed were voluntary, according to Ensign (2019). In addition, the point spread showed how common each dimension was in the scholarly articles. Ensign deduced, in order of occurrence, that acuteness, seclusion, origin, familiarity, affect, setting, place, and locus of control were the most common. The 656 coding instances for each dimension are shown in Figure 3.

Figure 3

The Disorientation Index
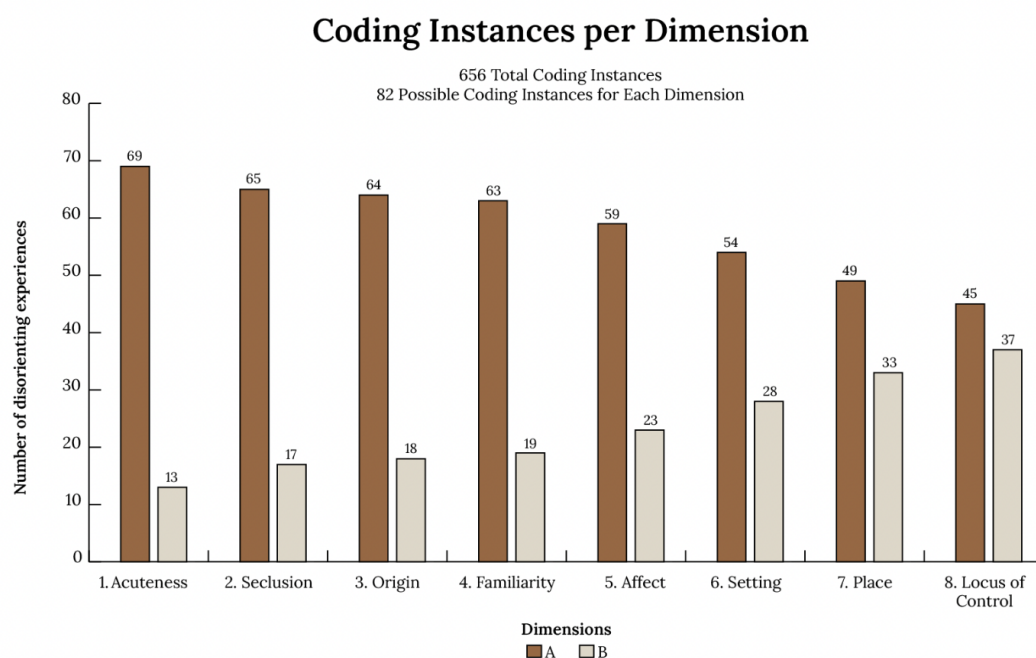
Note. Coding instances per dimension. The figure demonstrates the eight dimensions encompassing 16 categories that emerged from the data. Data are presented in decreasing order from the highest point spread to the lowest point spread. The numbers in each dimension represent the number of times the theme was coded in the data. Dimension 1. Acuteness: A.

Acute or epochal, B. Not acute nor epochal; Dimension 2. Seclusion: A. Alone, B. Not alone; Dimension 3. Origin: A. Externally generated, B. Internally generated; Dimension 4. Familiarity: A. No prior experience, B. Prior experience; Dimension 5. Affect: A. Negative, B. Not negative; Dimension 6. Setting: A. Not an educational setting, B. Educational setting; Dimension 7. Place: A. Not a new location, B. New location; Dimension 8. Locus of Control: A. Voluntary, B. Involuntary. Adapted from *The seed of transformation: A disorientation index* by T. Ensign, 2019, ProQuest. Adapted with permission.

Ensign's second finding from the review of 82 scholarly articles revealed 16 contexts of the disorienting dilemma. The most common context coded 12 times was "study abroad or international services" which included professionals entering a new country for a job opportunity and students from the US traveling as a group to another country (Ensign, 2019). The next most common context, coded 11 times, was "identity and human development," related to religious and spiritual experiences, femineity, and "soul work," (Ensign, 2019.) "Career," "death," and "professional development for educators" each were coded 8 times (Ensign, 2019). Career contexts involved retirement, being laid off or fired, and transitioning to a new field or industry. Death contexts related to witnessing death, aiding a loved one through death, and grieving. Professional development for educators pertained to adopting new ways of pedagogy, adjusting to expectations, and communication differences. "Race, class, gender and political experiences" were coded 7 times and related to the identities of those studied (Ensign, 2019).

The remaining 7 of the 16 contexts were coded far less frequently but remain important to understand as contexts of the disorienting dilemma. "Adult learning class or experience" was coded 4 times and related to completing GEDs (Ensign, 2019). "Entire college experience," according to Ensign's coding, was coded 4 times and pertained to all levels of the college experience such as undergraduate, graduate, and doctoral programs (Ensign, 2019). "Illness" was the 9th most coded disorienting dilemma, referring to illness experienced first hand or via a loved one. "Abuse" and "reading, poetry, or television" were both coded 3 times. Abuse centered

around abuse experienced first-hand as either an adult or as a child. "Reading, poetry, or television" related to connecting with art that helped the subject work through a difficult situation. The remaining 5 contexts, "environmental experience," "generally emotionally chaotic," "higher education class," "natural disaster," and "workplace" each were coded 2 times.

Ensign's final and third finding detailed the definitions of the 16 categories and 8 dimensions to better support the research's rationale. Ensign provided the coding rules for each dimension, the number of disorienting experiences coded for every dimension and category organized by the context of the experience, and numerous examples from the data set to illustrate each category and dimension. For the purposes of this literature review, the most common (acuteness) and least common (locus of control) dimensions are reviewed.

The first and most common dimension, acuteness, drew from Mezirow's terminology used to describe the disorienting dilemma (Ensign, 2019). Acuteness or epochal was "characterized by sharpness or severity of sudden onset," while "not acute or epochal" experiences were not sudden or time bound (Ensign, 2019). The contexts that coded highest for acuteness were study abroad and international service (12), identity and human development (8), and professional development for educators (8; Ensign, 2019). The most frequently coded contexts for not acute or epochal were identity and human development (3) and reading, poetry, and TV (3; Ensign, 2019). Figure 4 illustrates dimension one, acuteness, with the contexts of the disorienting dilemma and Figure 5 indicates the opposite dimension, not acute or epochal, with the corresponding contexts of the disorienting dilemma. Ensign (2019) detailed several examples of the research that pertained to either acuteness or not acute or epochal and concluded, "more research is needed to further understand how 'time' plays a role in the disorientation experience" (p. 135).

Figure 4

Dimension One: Acuteness, Acute or Epochal

Figure 5

Dimension One: Acuteness, not Acute or Epochal
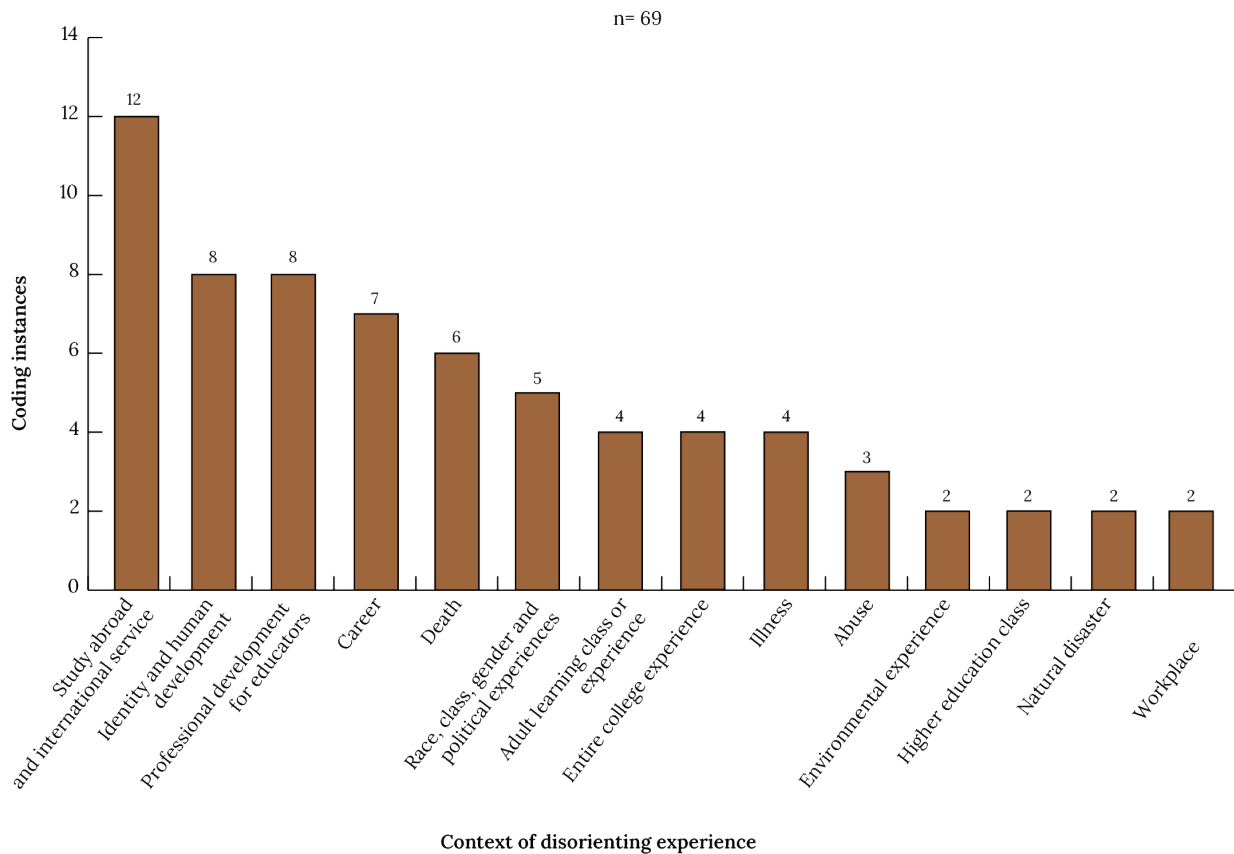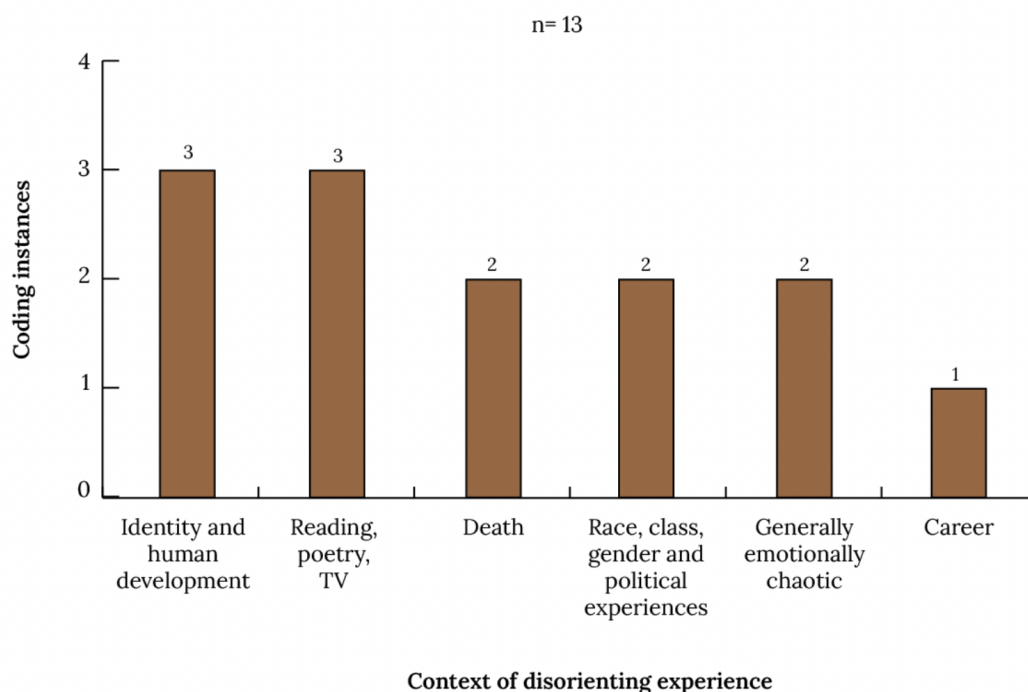
Note. Dimension One: Acuteness–Not acute nor epochal. The figure demonstrates 13 instances across six contexts of disorienting experience. Data are presented in decreasing order of frequency. The numbers in each category indicate the number of times a disorienting experience related to this theme occurred. Adapted from The seed of transformation: A disorientation index by T. Ensign, 2019, ProQuest. Adapted with permission.

The last and least common dimension, locus of control, pertains to voluntary or involuntary disorienting dilemmas and is the most significant for the researcher (Ensign, 2019). Ensign's (2019) review of scholarly articles revealed voluntary disorienting dilemmas represented 55% of the research while involuntary disorienting dilemmas represented 45%. "Voluntary" was carefully categorized by the answer to the following question posed by Ensign: "did they choose the disorienting experience (Voluntary), or was it thrust upon them (Involuntary)?" Ensign noted that educational experiences were considered voluntary because of the assumption that students selected to participate in such experiences on their own accords.

Natural disasters and death, however, were considered involuntary (Ensign, 2019). See Figure 6

and 7 for the comparison of voluntary and involuntary dimensions compared to the coded

contexts.

Figure 6

Dimension Eight: Locus of Control, Involuntary
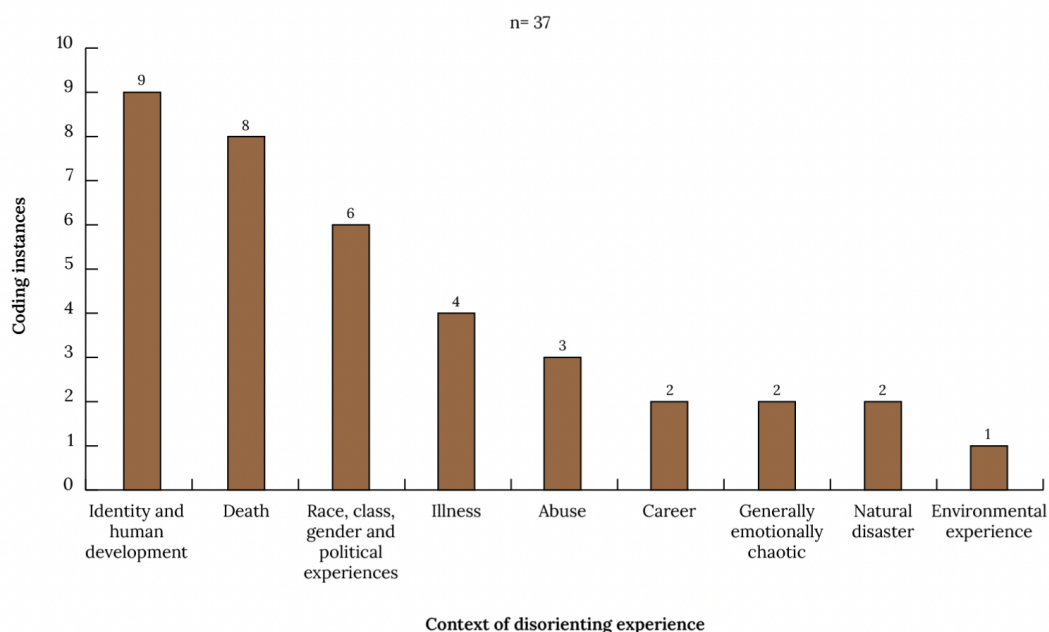
Note. Dimension Eight: Locus of Control–Involuntary. The figure demonstrates 37 instances across nine contexts of disorienting events. Data are presented in decreasing order of frequency. The numbers in each category indicate the number of times a disorienting experience related to this theme occurred. Adapted from *The seed of transformation: A disorientation index* by T. Ensign, 2019, ProQuest. Adapted with permission.

Figure 7

Dimension Eight: Locus of Control, Voluntary
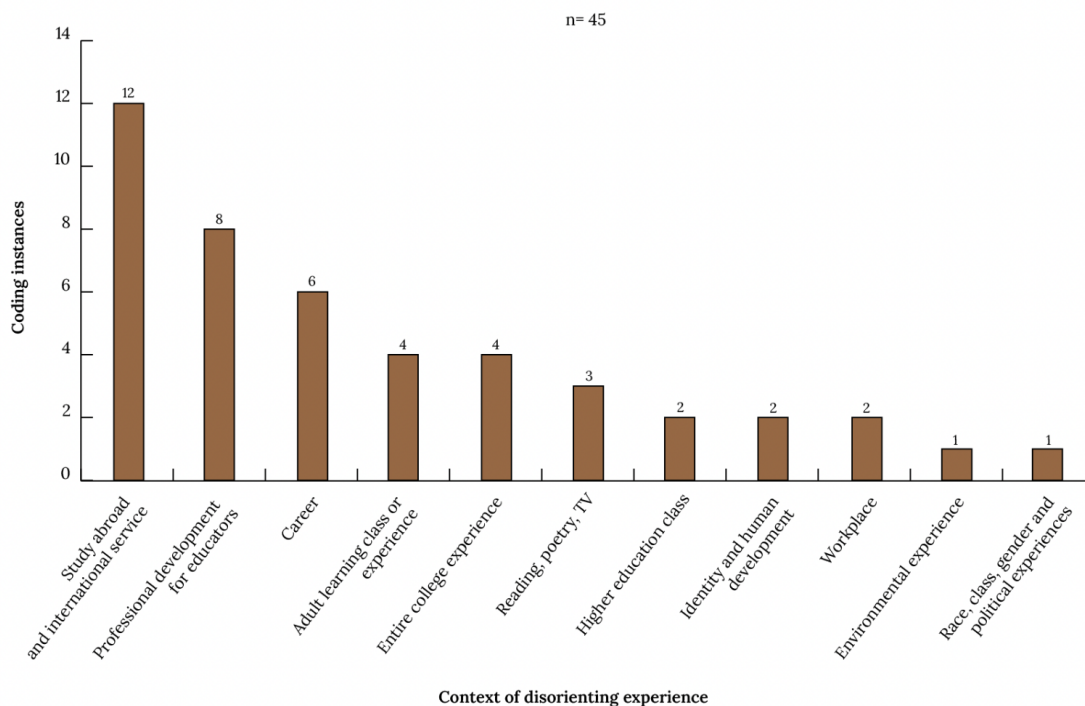
Note. Dimension Eight: Locus of Control–*Voluntary*. The figure demonstrates 45 instances across 11 contexts of disorienting events. Data are presented in decreasing order of frequency. The numbers in each category indicate the number of times a disorienting experience related to this theme occurred. Adapted from *The seed of transformation: A disorientation index* by T. Ensign, 2019, ProQuest. Adapted with permission.

Ensign (2019) found a number of the same contexts in voluntary and involuntary dimensions. Career, for instance, was coded two times for involuntary but six times for voluntary (Ensign, 2019). Identity and human development was coded twice for voluntary but then nine times for involuntary (Ensign, 2019). Environmental experience earned a single code for voluntary and involuntary (Ensign, 2019). Lastly, race, class, gender and political experiences earned six coding incidences for involuntary and one code for voluntary (Ensign, 2019). Ensign concluded, "This finding demonstrates the wide variability of experiences studied and the wide range of disorienting experiences that may lead to transformative outcomes. It also demonstrates

that not all triggers of transformation must be externally thrust upon a person and implies that we may voluntarily seek transformative experiences by designing our own personal disorienting events" (p. 169). Ensign showed that the large variability among voluntary and involuntary disorienting dilemmas warrants further investigation, which informed the research purpose for this study.

Chapter Summary

Chapter 2 of this study covered an array of scholarly articles and literature pertaining to transformational learning and the disorienting dilemma. This chapter began with the origin of transformational learning theory by Mezirow and the academic critiques that soon followed. Next, the researcher presented the disorienting dilemma and showed and discussed other learning theories. The researcher concluded this chapter with a deep description and review of Ensign's Disorientation Index, a comprehensive analysis of literature that uncovered the contexts and dimensions of the disorienting dilemma. The review of the Disorientation Index indicates large variability between voluntary and involuntary disorienting dilemmas, further confirming the need for further research. The next chapter, Chapter 3, contains details of the methodology used to answer the research question, "What, if any, are the benefits of voluntary disorienting dilemmas?"

Chapter 3: Research Methodology

Chapter Overview

Chapter 3 of the research includes details of the research methodology selected for this study. First, an overview of the theoretical framework is presented to situate the research, followed by a discussion of the researcher's philosophical worldview, which influenced the methodology selected for this study. A detailed description of the researcher's views of the nature of reality (ontology), the nature of knowledge (epistemology), the role of values (axiology), and the nature of language (rhetoric) are included in this section. Next, an outline of the research design, setting and sample, and human subject considerations are discussed, including arguments for a qualitative research design, grounded theory, and the specific grounded theory selected for this study. The remaining portions of this chapter are Instrumentation, Design Validity and Reliability, Data Collection, Data Management, Data Analysis, Theory Development. Chapter concludes with a summary that alludes to Chapter 4, Presentation of Findings.

Context

Much has been researched, debated, and refined regarding transformational learning since Mezirow's (1978a) introduction of transformational learning theory in the late 1970s. The first step of transformational learning, the disorienting dilemma, has also been fairly researched and defined in various fields of research as "life crisis" in psychosociology (Nuckolls et al., 1972); "cognitive dissonance" in sociology (Festinger, 1962); "crucible moments" in the managerial sciences (Bennis & Thomas, 2002); "black swan event" in finance theory (Taleb, 2007), "ah ha" moments in education (Pilcher, 2016); "triggering events" in global leadership (Mendenhall et al., 2018); and "unfreezing" in change management (Lewin, 1947). The benefits of voluntary

disorienting dilemmas are, however, vastly under-researched and have significance for the fields

of sociology, change management, global leadership, and more. RQ1 is, "What, if any, are the

benefits of voluntary disorienting dilemmas?" Two further sub-research questions supporting

RQ1 guided this study:

- RQ2: What is the meaning(s) of voluntary disorienting dilemmas?

- RQ3: Why or why not would subjects repeat their voluntary disorienting dilemma

  again?

Theoretical Framework

All researchers must answer three critical questions before conducting research: (a) why

conduct research?; (b) what to research?; and (c) how to conduct research? (Bryman, 2006). To

answer the first question, the researcher must understand the 'lens' through which a worldview is

held (Hiebert, 2008). Worldviews, also known as paradigms (Lincoln & Guba, 2000), are

defined as "a basic set of beliefs that guide action" (p. 17). Researchers must further understand

and develop their ontological and epistemological stances, which lead them to the

methodological decisions that guide their research (Creswell, 2007).

A theoretical framework is a requirement of solid research, as it crystalizes the full

context a researcher brings to a study, incorporating worldviews, ontological, and

epistemological positions (Blumer, 1969). Lysaght (2011) described the need for identifying and

explaining one's theoretical framework for a study as "a researcher's choice of framework is not

arbitrary but reflects important personal beliefs and understandings about the nature of

knowledge, how it exists (in the metaphysical sense) in relation to the observer, and the possible

roles to be adopted, and tools to be employed consequently, by the researcher in his/her work"

(p. 572). Mertens (1998, p. 3) further asserted that the theoretical framework "has implications for every decision made in the research process."

A theoretical framework of this study is presented in Figure 8, which indicates the researcher's worldview of social constructivism, views of the nature of reality (ontology), the nature of knowledge (epistemology), the relevance of values (axiology), and the nature of language (rhetoric). First, the researcher acknowledges the belief of social constructivism, a construct that holds that participants embrace their own and often distinct meanings of reality (Vygotsky, 1978). Elkind (2005) described, "Constructivism is the recognition that reality is a product of human intelligence interacting with experience in the real world. As soon as you include human mental activity in the process of knowing reality, you have accepted constructivism" (p. 334). Second, and following a social constructivist philosophy, the ontological position of this study is based on a subjective view of the world. Participants in the current study detailed their voluntary disorienting dilemmas, with each containing a wholly subjective reality and experience. Third, the epistemology that guided the current study was a social and historical construction of knowledge based on a belief that all people form their views of the world with active learning as a constructive process (Lincoln & Guba, 1985). Fourth, the axiological belief that aided the current study was the importance of ethics. The researcher believes in the integrity of high quality data, human subjects' well-being, and original work. Lastly, this research's rhetoric assumptions related to the Social constructivism of language and meaning theory, a construct that means that language is "the triadic relation among language, humans (a linguistic community) and the world" (Bo, 2015, p. 88).

Further answering the question of "what to research?," the philosophical basis of the current study was an interpretivist research (see Figure 8). The interpretive philosophy holds that

reality is negotiated through interactions with other social beings, leading the researcher to explore the full range of views expressed by participants (Burrell & Morgan, 1979). Interpretivists further seek to understand the beliefs, motivations, and reasoning of individuals in a social situation to eventually obtain the data to explain phenomena such as voluntary disorienting dilemmas.

Figure 8

Theoretical Framework of Study
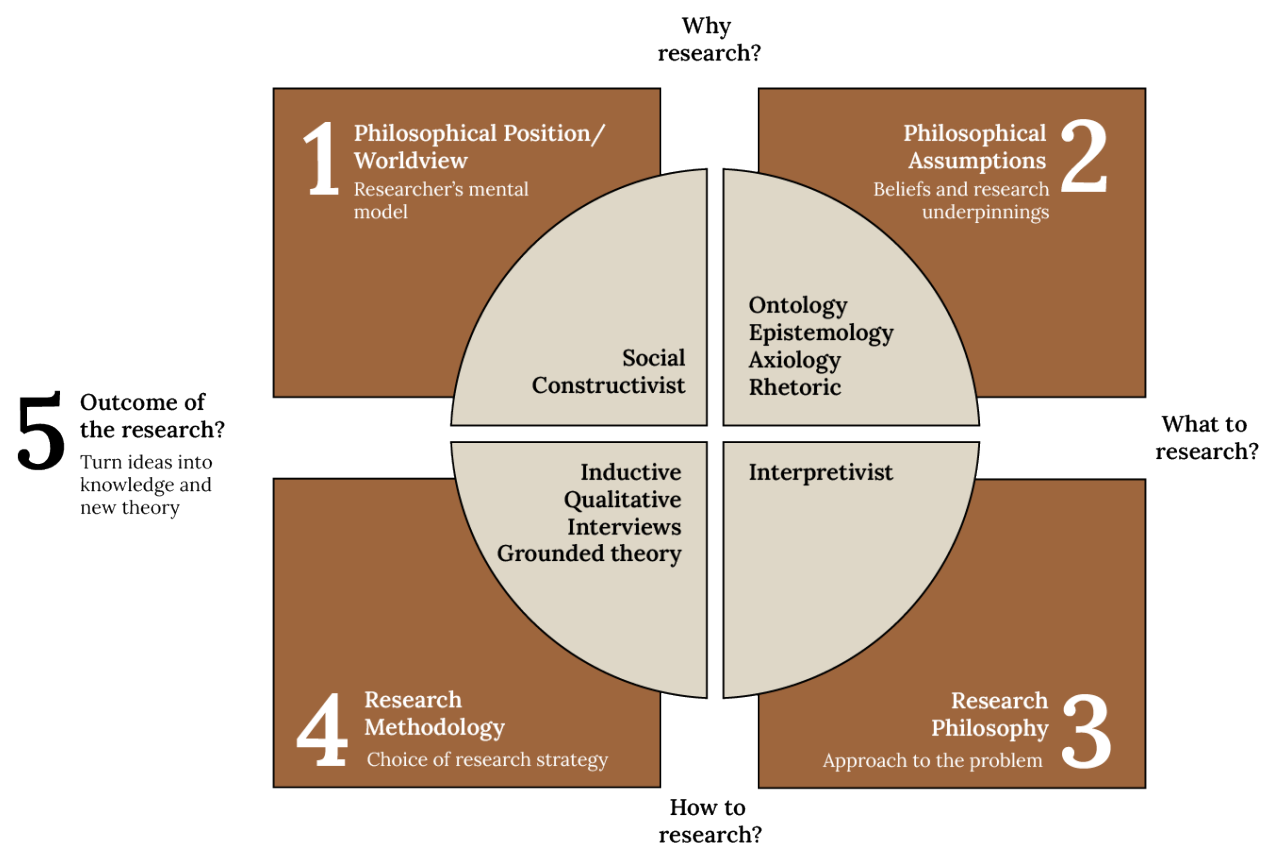
Research Design

The selection of methodology for any research should derive from two areas: the researcher's philosophical position and the nature of the phenomenon under study (Holden & Lynch, 2004). In the previous section, the researcher of the current study disclosed that she holds

a social constructivist worldview, philosophical assumptions, and an interpretivist research philosophy. These disclosures satisfied the first two answers to Holden and Lynch's fundamental questions that guide all research: "why conduct research," and "what to research?" (2004). In this section, the researcher answers the final question, "how to conduct the research?" and presents the argument for Straussian grounded theory, a qualitative research methodology, used for this study (Holden & Lynch, 2004).

For the conceptual framework (see Figure 1) created for this study, the focus was on understanding voluntary disorienting dilemmas, a subcategory of the first step of transformational learning theory (Mezirow, 1978b). Disorienting dilemmas are not produced in the natural world via the scientific method with an absolute positive truth or clear cause and effect (Comte, 2009). Rather, disorienting dilemmas are felt, experienced, and interpreted on an individual level within the social realm, a reality that "is actively created as we act in and toward the world" (Mead, 1934, p. 46). In contrast to the scientific method or quantitative research, a qualitative methodology is based on interpretivism/constructivism (Sale et al., 2002), which accounts for the subjective ontological view of the world of both researcher and study participants (Saunders et al., 2012). Further, the aim of qualitative methodology is to construct realities, which cannot be explained fully through analyzing numerical data (Saunders et al., 2012). For these reasons, and given the nature of disorienting dilemmas and the researcher's constructivist worldview, a qualitative research methodology was appropriate for this study.

Qualitative research has three merits, which made it suited for the current study. First, qualitative research aims to articulate the reality of the study's participants and their lived experiences. Second, qualitative research yields "thick descriptions" of participants' realities, which voluntary disorienting dilemmas certainly hold (Geertz, 1973). Lastly, qualitative research

has "local groundedness" (Miles et al., 2020, p. 8) because each participant offers situation-specific information. This aspect permits the researcher to "contain" the phenomenon within certain contexts and conditions for occurring. In addition to these three merits, qualitative research can be rigorously collected, reviewed, organized, and validated (see Design Validity and Reliability).

Qualitative research methodologies are numerous, including life history narratives (Wahyuni, 2012), participatory action research with active dialogue with the participant (Carter & Little, 2007), and case study approaches (Guba & Lincoln, 1994). The researcher selected grounded theory, which is deemed "one of the most sophisticated and developed approaches to rigorous qualitative (nonnumerical) research" (Simon & Goes, 2018, p. 104). A major quality of grounded theory, as noted by grounded theory's fathers, Glaser and Strauss, is its "discovery of theory from data systematically obtained from social research" (Glaser & Strauss, 1967, p. 2). Further, grounded theory is intended to generate theory that is grounded in the data when little is known about a phenomenon (Glaser & Strauss, 1967). In the case of the current study, little is known or previously researched about voluntary disorienting dilemmas.

Grounded theory has evolved into various methodological genres, the four main ones are classic grounded theory by Glaser (1978), the Strauss and Corbin's (1998) qualitative data analysis, the constructivist grounded theory (Charmaz, 2006), and the feminist grounded theory (Wuest, 1995). All four grounded theories share similarities in coding, interview structures, and the belief that theory rises from data (Birks & Mills, 2015). The researcher selected Straussian grounded theory for the current study of voluntary disorienting dilemmas because of its distinctions and merits apart from the types discussed below.

- Straussian grounded theory advocates for a review of literature to give the researcher general context for theory development. Other forms of grounded theory do not support a review of literature. The researcher was already familiar with transformational learning theory, which was the basis of this study.

- Straussian grounded theory supports deduction and verification with the ability to apply prior research and knowledge. The researcher analyzed Ensign's research of the disorienting dilemma in the literature review section.

- Straussian grounded theory dictates a robust three-stage coding methodology, which lends to higher validity and credibility.

- The Straussian coding process has its root in the philosophical use of induction, deduction, and verification, which is more thorough than the induction focus of classic grounded theory and constructivist grounded theory.

- The aim of Straussian grounded theory is ultimately to discuss broader structural conditions (Strauss & Corbin, 1998) for data analysis, ideal for as broad topics such as disorienting dilemmas.

Setting and Sample

The researcher deployed purposeful and theoretical sampling to answer the research question of this study, "What, if any, are the benefits of voluntary disorienting dilemmas?" Purposeful sampling is always the first sampling technique used in grounded theory and is a common technique used in several qualitative research studies to identify and select data-dense cases for the most effective use of limited resources (Patton, 1990). This approach involves identifying and selecting participants who are particularly knowledgeable about or experienced with the phenomenon under study (Creswell & Plano Clark, 2011). The availability and

willingness of participants must also be considered, as well as the communication skills they require to describe, express, and respond to research questions (Bernard, 2002).

For this study, the researcher selected the participants based on their responses to a post shown and reposted twice on the researcher's personal LinkedIn account over the course of 2 weeks. In addition to completing an intake form to qualify, participants needed to attest they were aged at least 18, lived full time in the United States, and could participate in an interview via Zoom. After the completion of 20 interviews, the researcher shifted to theoretical sampling to better understand the emerging themes in the data.

Theoretical sampling was born out of grounded theory, a systematic research approach that builds concepts and theory from data (Corbin & Strauss, 2015). As defined by Glaser and Strauss (1967), theoretical sampling is a way of collecting data and assessing the type of data to then collect based on the theory and categories that emerge from the data. Theoretical sampling dictates, "Following where the data have led to expand and refine the evolving theory during the analytical process" (Ligita et al., 2020, p. 117). As grounded theory is not driven by a concern for representativeness but rather guided by a central research question and a conceptual framework that supports it, theoretical sampling is the most relevant for grounded theory research (Miles et al., 2020). This study, a qualitative research study based on Straussian grounded theory, followed theoretical sampling in addition to the initial purposeful sampling.

The eventual sample size of this study included 70 individuals, well above the threshold of 20, the suggested number recommended to develop a well-saturated theory using grounded theory as the methodology (Creswell, 2007). In all forms of grounded theory, data saturation is defined as the theoretical saturation, referring to the point where the main concepts required for the formulation of the theory have emerged and been articulated by the researcher (Glaser &

Strauss, 1967). Through the process of coding, described in detail in the Data Analysis section, the researcher determined when saturation was achieved and continued interviews with additional participants to achieve theoretical density (see Morse, 2004). Data saturation is subjective (Morse, 2015), as discussed further in the Design Validity and Reliability section. To counter this inherent limitation, the researcher pursued data saturation objectively by upholding the following criteria: (a) clearly articulating the purpose of the study, (b) identifying the study population, and (c) ensuring coding stability (see Hennink et al., 2017).

Human Subject Considerations

Sanjari et al. (2014) asserted that humans have "increasingly become the instrument of choice" for naturalistic research for several compelling reasons: they are responsive to environmental changes, possess the tools to interact and react to situations, critically think, self-regulate, provide immediate feedback in some situations, and can articulate complex emotions and thoughts, among other attributes (p. 5). Given humans' wide applicability as research subjects, researchers must increasingly protect human subjects' emotional, psychological, and even physical well-being during research processes. The researcher upheld the highest standards for human subject research.

First, this study strictly followed the guidelines set forth by the Institutional Review Board (IRB) at Pepperdine University, a national agency overseen by the Food and Drug Administration, which "protects the welfare and dignity of human subjects" (Center for Drug Evaluation and Research, n.d., para. 3). Specifically, this study followed the ethical principles stated in the Belmont Report (U.S. Department of Health & Human Services, 2020) that contains three principles for research pertaining to human subjects: (a) respect for persons, (b) beneficence, and justice (U.S. Department of Health & Human Services, 2020).

To uphold the ethical principles set forth by the U.S. Department of Health & Human Services noted above, the researcher used several tools and procedures. First, the researcher sent a social-behavioral adult participant informed consent form (see Appendix A) to the participants, which they signed via an encrypted signatory platform, DocuSign, and returned to the researcher before conducting any interviews. Only the individuals who signed and returned the adult participant informed consent form participated in the interviews. Second, as shown by the study recruitment message sent via LinkedIn and in the adult participant informed consent form (see Appendix A), the researcher conducted interviews on a voluntary basis. Third, participants could, at any point, discontinue their participation in the research study, and they participated in this study without being forced, manipulated, paid, threatened, or coerced.

Fourth, given the depth and complexity of this study to answer the benefits of voluntary disorienting dilemmas and to further uphold all ethical principles of the U.S. Department of Health & Human Services, participants received and read the initial interview questions before the start of the interview at least 48 hours before all scheduled interviews. Further, participants had ample time to answer, explore, and clarify their answers to all questions. Lastly, the researcher verbally reminded each participant at the start of each interview that participation was voluntary, no payment for participation would be made, all transcripts of the interview would be destroyed within one month of the study's completion, and all details used to describe any voluntary disorienting dilemmas would be strictly confidential.

The researcher submitted a research protocol detailing the above procedures and the intent of this study to the Pepperdine IRB (protocol IRB # 20-02-1286), which were approved on March 30, 2023 (see Appendix B). In addition to the protocol described above, the researcher submitted her CITI course certificate as evidence of understanding the ethical ramifications and

needs in conducting research (see Appendix C). This study was approved as an Exempt Category 2 study because the research "only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording)," (Office for Human Research Protections, 2021). Not all research that meets the criteria above can be classified as Exempt, as exemption depends on the types of identification information disclosed in the research. Identifying data can be direct such as names and driver's license numbers or indirect such as all data for a specific individual (Office for Human Research Protections, 2021). A study must meet one of the following restrictions for exemption, and this study met the second restriction:

- Recorded information cannot readily identify the subject (directly or indirect identifiers linked to the subjects);

- Any disclosure of the human subjects' responses outside of the research would not reasonably place subjects at risk of criminal or civil liability, or be damaging to the subjects' financial standing, employability, educational advancement, or reputation; or

- The information is obtained by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make a determination.

Design Validity and Reliability

"Reliability" and "validity," as applied in quantitative research, is the equivalent of "trustworthiness" in qualitative studies (Marshall & Rossman, 1995). Because research in qualitative studies cannot be measured and calculated repeatedly, the concept of "trustworthiness" pertains to how sound and valuable the research is (Patton, 1990). To address

the trustworthiness of qualitative research in grounded theory, Strauss and Corbin (1998) outlined the following eight conceptual questions to guide each study:

1. Are concepts generated?

2. Are the concepts systematically related?

3. Are there many conceptual linkages, and are the categories well developed? Do categories have conceptual density (richness of the description of a concept)?

4. Is variation within the phenomena built into the theory (how differences are explored, described, and incorporated into the theory)?

5. Are the conditions under which variation can be found built into the study and explained?

6. Has process been taken into account?

7. Do the theoretical findings seem significant, and to what extent?

8. Does the theory stand the test of time and become part of the discussions and ideas exchanged among relevant social and professional groups? (pp. 270-272).

Strauss and Corbin (1998) derived their eight guiding questions related to trustworthiness by leveraging the research of Lincoln and Guba (1988). Trustworthiness is built based on the amount of time spent collecting data, exploring different sources, methods, investigators, and theories of the data, considering the researcher's biases and subjective leanings, and accounting for the constraints and limitations of the study (Lincoln & Guba, 1985). According to Lincoln and Guba, trustworthiness is cemented in qualitative research by four principle pillars: credibility, transferability, dependability, and confirmability which all aid in the "applicability, consistency, and neutrality" of each study (p. 143). These four pillars are presented below and later discussed in Chapter 4.

Credibility

      Credibility in qualitative research and grounded theory in particular can be obtained in several ways. Lincoln and Guba (1985) defined credibility as, "the extent to which the findings of a qualitative research study are internally valid." Credibility addresses the "fit" between respondents' views and the researcher's representation of them (Tobin & Begley, 2004). To produce credibility, a researcher must engage extensively with the participants (Lincoln & Guba, 1985). One method to engage extensively with participants, which this study followed, is to show each participant the verbatim transcript produced from the participant's interview. The researcher also shared the emerging codes and categories from the data with participants to ensure credibility. In addition to engagement with participants, peer debriefers "keep the inquirer honest" (Lincoln & Guba, 1985, p. 77). Peer debriefers, which the researcher also completed, include peers reviewing transcripts, developing their own coding from the data, and discussing their interpretations with the principal investigator.

Transferability

      Transferability relates to how well research and findings from one study apply to another setting of research (Marshall & Rossman, 1995). A researcher can enhance the transferability of a study by selecting a diverse group of participants who hold different perspectives and experiences (Marshall & Rossman, 1995). The researcher ensured transferability in this study via collecting participants ages, races, and genders, if disclosed. In addition, a researcher can utilize the insights of peer debriefers to ensure the research, methodology, results, and the emerging theory is as nonsubjective as possible (Marshall & Rossman, 1995).

Dependability

The third component of trustworthiness in qualitative research is how well the data represent shifts in conditions of the phenomenon under study. Grounded theory should incorporate various conditions and dimensions of the phenomenon studied to "stand the test of time," (Lincoln & Guba, 1985). To assist in dependability, a researcher may use an inquiry auditor who reviews raw data and the researcher's findings throughout the study to validate the dependability of the research. In the current study, the researcher did not use an inquiry auditor due to time and other constraints but will use this method in future research related to voluntary discomfort.

Confirmability

Confirmability pertains to the "objectivity" of the research and how well another researcher with another set of beliefs and lens will produce similar results to that of the researcher. For this study, the researcher will keep transcripts of every interview for the next 5 years so that an "audit trail" would be readily available for an inquiry auditor, as discussed above (see Lincoln & Guba, 1985). The researcher intends to have an inquiry auditor produce an objective perspective separate from the peer debriefers after the publishing of this initial research.

Data Management

Data management is an organizational process defined as "a designed structure for systematizing, categorizing, and filing materials to make them efficiently retrievable and duplicable" (Schwandt, 1997, p. 61). Data can also be sensitive, a reason, Strauss and Corbin (1998) emphasized, researchers should anticipate data management before conducting research to ensure their safety and confidentiality. The source of the initial data for this study was through

off-camera Zoom recordings. The researcher selected off-camera interviews so that participants could focus on their memories, detail their feelings, and not be distracted by their own faces while on Zoom (see Daar et al., 2021).

The researcher downloaded recorded interviews locally to a password-protected encrypted personal laptop computer and stored them in a locked cabinet at her primary residence. A copy of all recorded interviews will be stored in the cloud on Pepperdine's password-protected server for no more than 5 years. The researcher also took notes by hand during and after each interview, scanned them weekly, and stored them on a password-protected encrypted personal laptop computer. The researcher will destroy the notes taken by hand and then delete scanned electronic copies following the conclusion of this study to protect the participants' confidentiality.

Following the recorded interviews, the researcher generated transcripts using a third party transcript service, Weloty, which pairs well with Nvivo coding software, also used in this study and discussed in Data Analysis below. Before uploading the recordings to Weloty, the researcher labeled and categorized each interview with a participant pseudonym (P1, P2, and so forth) and date of the interview. For coding the transcripts created by Weloty and referencing notes taken by hand, the researcher created an electronic indexing system with memos and notes related to potential open, axial, and selective codes. To conduct data analysis, the researcher relied on data diagrams to explore categories, draw relationships across the hypotheses, and determine visual representations of the data. Lastly, the researcher created a model to represent the study's theoretical framework (see Chapter 4), which portrayed the conditions of the phenomenon studied (see Strauss & Corbin, 1998).

Data Analysis

Grounded theory leverages data analysis with data collection constantly to allow theory to emerge. To create theory, data must first be rigorously collected, reviewed, and organized, a process known as coding (Glaser & Strauss, 1967; Strauss & Corbin, 1998). The data analysis for Straussian grounded theory requires three types of coding: open, axial, and selective (Glaser & Strauss, 1967; Strauss & Corbin, 1998). These three forms of coding ensure the following five analytic goals of grounded theory are met:

- Build rather than test theory;

- Provide researchers with analytic tools for handling masses of raw data;

- Help the analysts to consider alternative meanings of phenomena;

- Be systematic and creative simultaneously; and

- Identify, develop, and relate the concepts that are the building blocks of theory. (Strauss & Corbin, 1998, p. 13)

Each of the three forms of coding are discussed in detail below, though Straussian grounded theory dictates that coding is a fluid process, not linear, and therefore, the researcher must "go back" to the original data to refine and reinterpret it (Strauss & Corbin, 1998). Therefore, there is no definitive "start" and "stop" among the three forms of coding. This study followed this fluid approach.

Open Coding

Open coding starts the data analysis of Straussian grounded theory. The goal of open coding is to conceptualize and categorize data via two analytic approaches: making comparisons and asking questions of the data (Strauss & Corbin, 1998). During open coding, the researcher labels individual phenomena and clusters them around core themes and categories as more data

are collected. As Strauss and Corbin (1998) noted, the researchers' categories may be declared

by the study's participants, called "in vivo" language, which is taken directly from raw

transcripts and textual data line.

After creating categories from the data, the researcher examines them for properties and

dimensions. Strauss and Corbin (1998) defined properties as, "characteristics of a category, the

delineation of which defines and gives it meaning," (p. 101). Dimensions showcase how each

property within open coding can vary along a continuum. For example, a category could be

defined as "self-doubt" with dimensions of "chronic" or "momentary." Together, properties and

dimensions offer depth to the categories defined by the researcher and help generate the next

coding form.

Axial Coding

The second phase of data analysis in Straussian grounded theory is axial coding. In this

phase, categories are related and developed further into subcategories. The goal of axial coding,

according to Strauss and Corbin (1998), is to create a model that describes the exact conditions

that create a phenomenon's occurrence. Precise conditions can be difficult to ascertain but should

exist and be noted in four ways: causal, intervening, contextual, and all of these ways (Strauss &

Corbin, 1998). Casual conditions refer to elements that lead to the occurrence of the

phenomenon, the main idea of the study, or the subject of the study, such as an "ah ha" moment

in transformational learning. Intervening conditions are more nebulous but refer to a range of

elements that overcome the phenomena, or "mitigate or otherwise impact causal conditions on

phenomena" (Strauss & Corbin, 1998, p. 131). A "fixed mindset" is an example of an

intervening condition of the phenomena of transformational learning. Contextual conditions are

the most complex, defined as a "specific set of conditions (patterns of conditions) that intersect

dimensionally at this time and place to create a set of circumstances or problems to which

persons respond through actions/interactions" (Strauss & Corbin, 1998, p. 132). A person with a

fixed mindset who sits at home every day after retirement is an example of a contextual

condition.

Selective Coding

Open and axial coding is often followed by selective coding and builds from both

processes. Selective coding is "the process of selecting the central or core category,

systematically relating it to other categories, validating those relationships, and filling in

categories that need further refinement and development" (Strauss & Corbin, 1998, p. 116).

Selective coding ties together the categories uncovered and should be "able to account for

considerable variation with categories" (Strauss & Corbin, 1998, p. 146). Saturation, when new

findings no longer emerge from data and all categories have been fully uncovered, explored, and

exhausted, occurs during selective coding. As stated earlier, however, coding is not linear. In the

current study, the researcher conducted several rounds of coding to obtain the findings discussed

in Chapter 4.

In addition to open, axial, and selective coding, process was an imperative element of the

data analysis in this study. Process is understood in terms of passage of time to get a sense of

how, when, and how often the phenomenon occurs (Glaser, 1978). Strauss and Corbin (1998)

addressed process by being attuned to the following four areas:

- The change in conditions that impact the action and interaction over time;

- The action and interaction response to that change;

- The consequences that result from that action and interaction response; and

- Describing how those consequences become part of the conditions influencing the next action and interaction sequence. (p. 143)

Lastly, data analysis and particularly coding is tedious, requiring the researcher to scrutinize transcripts by line, paragraph, or even on a word-by-word basis (Strauss & Corbin, 1998). Today, many qualitative data analysis software exists, including MAXQDA, NVivo, ATLAS.ti, to assist in qualitative research. For the current study, the researcher used NVivo because of its ease of use and ability to illustrate individual words and phrases within their context and links to other data coded in the same data set. Software does not and cannot analyze data; the researcher does (Weitzman & Miles, 1995).

Theory Development

Glaser and Strauss asserted that grounded theory is a "discovery of theory from data," (1967, p. 1). Researchers should allow the data to showcase a theory, which emerges through the rigorous qualitative process of grounded theory (Glaser & Strauss, 1967). Many researchers since Glaser and Strauss have argued strongly against this view. Pidgeon and Henwood (2004, p. 628) insisted, "Philosophically speaking, theory cannot simply 'emerge' from data, because interpretation and analysis are always conducted within some pre-existing conceptual framework brought to the task by the analyst." Charmaz (2006) further developed a social constructionist version of grounded theory, stating that theories do not "emerge" from the data but are formed by the researcher who "creates an explanation, organization, and presentation of the data rather than discovering order within the data. The discovery process consists of discovering the ideas the researcher has about the data after interacting with it" (Charmaz, 2006). Pidgeon and Henwood (1997) suggested that grounded theory researchers substitute "theory generation" for "discovery" to better acknowledge the constructive reality in the process of theory development.

After performing the three stages of data analysis discussed in the section above, a "completed" grounded theory emerges to give others "a way of thinking about and studying social reality" (Strauss & Corbin, 1998, p. 3). The researcher aimed to do the same in this study. Ultimately, the aim of grounded theory is to create, "a rich, tightly woven, explanatory theory that closely approximates the reality it represents" (Strauss & Corbin, 1998, p. 57).

Figure 9

Workflow of the Study

Intellectual Work Flow of Proposed
Qualitative Grounded Theory Study

Philosophical Worldview & Experiences	→	Choice of Substantive Research Topic	→	Theoretical Literature Review	→	Quantitative Pilot Research Study

• Develop research hypotheses
• Enhance richness of concept development
• Promote concept clarity
• Reach conceptual density

Purpose of study	Research questions	Research methodology

Purposive & theoretical sampling

Theoretical saturation

• Start with rich response cases
• Build up emerging insights and theory

Data collection

• Field notes, audio, and video digital recordings
• Interviews transcripts, translations
• Data files ensuring participant confidentiality, indexing system

Data management

Data coding

Open coding

• Identifying themes
• Conceptual lables, In Vivo Coding
• Indexing concepts

Axial coding

• Code book with high-level categories and subcategories
• Process coding, Causation coding
• Theoretical memos

Selective coding

• Main categories
• Core category

Conditional framework —— Theoretical propositions → | **Theory emergence** |

Chapter Summary

This chapter covered the social constructivist philosophical beliefs of the researcher and the rationale for selecting a grounded theory, a qualitative research methodology, for this study to answer RQ1, "What, if any, are the benefits of voluntary disorienting dilemmas?" A theoretical framework assisted the inquiry path from the research conceptualization to desired outcomes, showcasing the ontological, epistemological, axiological, rhetorical, and methodological assumptions for the study. This chapter also addressed validity and reliability of the qualitative research selected and included a discussion of the strategies for ensuring quality, trustworthiness, ethical, and substantive aspects of Straussian grounded theory, which underpinned this study. The full analytical procedures outlined in this chapter are illustrated in a flow chart (see Figure 9).

Chapter 4: Presentation of Findings

Chapter Overview

Chapter 4 contains the key findings of this qualitative grounded theory study focused on the first step of transformational learning: the disorienting dilemma. In particular, this chapter includes the benefits of voluntary disorienting dilemmas, the rationale for pursuing voluntary disorienting dilemmas, and why participants would repeat a voluntary disorienting dilemma based on responses of the participants of this study and as interpreted by the researcher in the most unbiased manner feasible. The context of this study is presented first along with the semistructured interview questions used. Then, an in-depth discussion of the study's participants and their demographics is introduced. Lastly, the researcher itemizes the key findings of this study and includes the open, axial, and selective themes for the research questions of this study.

Context

The purpose of this qualitative grounded theory study was to determine the benefits, meanings, and intent of replication of voluntary disorienting dilemmas. Compared to involuntary disorienting dilemmas, which are not pursued by choice, voluntary disorienting dilemmas are at the discretion of subjects' will and determination despite a dilemma's unpleasant, uncomfortable, and often undesirable context. The central research question of this study was RQ1: "What, if any, are the benefits of voluntary disorienting dilemmas?" Two additional research questions guided this study:

- RQ2: What is the meaning(s) of voluntary disorienting dilemmas?

- RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?

Based on these three research questions, the researcher developed 10 semistructured interview questions to guide a discussion with each participant. To answer RQ1: What, if any, are the benefits of voluntary disorienting dilemmas?, the researcher asked participants the following interview questions, identified as IQ1-IQ4:

- IQ1: What was an experience you chose to do, even though it made you uncomfortable to do it?

- IQ2: What happened in that uncomfortable experience?

- IQ3: Why was it uncomfortable for you?

- IQ4: What did you gain or not gain from the uncomfortable experience?

For RQ2: What is the meaning(s) of voluntary disorienting dilemmas?, the participants responded to the following questions, numbered from IQ5-IQ7, which the researcher modified as each interview unfolded:

- IQ5: Even though the experience was uncomfortable when you imagined doing it or were in the midst of doing it, why did you do it?

- IQ6: Did you want to stop at any point? Why or why not?

- IQ7: What was your thinking as you considered pursuing this uncomfortable experience?

The final research question, RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?, was more direct and simple. The researcher used the following interview questions to prompt further reflection and detail:

- IQ8: If you had to do the uncomfortable experience again, would you? Why or why not?

- IQ9: Was it "worth it"?

- IQ10: Is there anything else that comes to mind now that you've recounted this uncomfortable experience?

Before each interview, the researcher confirmed the participant's willingness to participate in the interview. The researcher also informed them that the interview could be stopped at any point at their discretion. After the final question, the researcher reminded each participant of their confidentiality and thanked them for their time and personal narratives.

Study Participants

The study sample consisted of 70 adults who responded to a LinkedIn post published by the researcher in April 2023. All participants met the following criteria based on the following screening parameters and participants' attestations:

- At least 18 years of age

- Lives full time in the United States

- Speaks English

- Able to participate in an interview via Zoom

Exclusion criteria for this study included those subjects who failed to attend their interview session twice after rescheduling, those who could not secure reliable internet to conduct the interview, those who refused to sign the consent form, and those who claimed they could not recount a time when they sought to be uncomfortable on a voluntary basis. No participant chose to discontinue the interview due to being emotionally impacted by recounting a story. Further, no participant in this study elected to have a break during the interview due to emotional labor or triggering memories. Two participants requested a five-minute break due to at home delivery and a bathroom need.

The ages and sexual orientations of the study's participants reflected similar demographics of Americans as shown in Table 7. All participants offered their demographic data, including sexual identification, age, and race. Female participants accounted for 51.4% of the sample. In America, females account for 50.5% of the population (Census, 2022), representing a less than two percent difference to that of the study. The average age of the study's participants was 40.5 years with a range of 21 to 64 years. According to the latest U.S. Census (2022), the average age of Americans is 38.8 years, a difference of about four percent compared to the current study's participants.

The study's participants were overall more diverse, racially, than America in aggregate as further shown on Table 7. Ten percent of the study's participants identified as mixed race, 15.7% identified as Black, 24% identified as Asian, 7% identified as Hispanic, and 44% identified as White. The latest U.S. Census (2022) indicated that 75.8% of Americans are White, 18.9% Hispanic, 13.6% Black, 6.1% Asian, and 2.9% mixed. No study participants identified as Native American though 1.3% of the American population belong to this group (Census, 2022). Thus, this study had more mixed, Black, and Asian race representation compared with the America population but a slight underrepresentation of Native American and Hispanic people. This study had notable underrepresentation of White participants by a margin of 55%.

Table 7

Study Participants' Demographics

Subject ID	Gender	Race/ethnicity	Age
Subject 1	Female	Hispanic	35
Subject 2	Female	Chinese	43
Subject 3	Male	White	39
Subject 4	Male	White	41
Subject 5	Female	Armenia	38
Subject 6	Male	Black	40
Subject 7	Male	White	35

Subject ID	Gender	Race/ethnicity	Age
Subject 8	Female	African American	59
Subject 9	Male	Japanese	34
Subject 10	Female	White	51
Subject 11	Male	White	53
Subject 12	Female	Indian	43
Subject 13	Female	Asian	42
Subject 14	Female	Asian	42
Subject 15	Female	Mixed Race	44
Subject 16	Female	White	52
Subject 17	Female	White	61
Subject 18	Female	Caribbean	49
Subject 19	Female	White	58
Subject 20	Female	White	48
Subject 21	Female	African American	57
Subject 22	Male	White	36
Subject 23	Male	Armenian American	34
Subject 24	Female	Asian American	21
Subject 25	Female	Half Filipino	29
Subject 26	Female	White	41
Subject 27	Female	White	25
Subject 28	Female	Asian American	39
Subject 29	Female	Black	25
Subject 30	Male	White	43
Subject 31	Male	Asian	40
Subject 32	Male	Indian	39
Subject 33	Male	Filipino American	53
Subject 34	Female	White	38
Subject 35	Female	White	42
Subject 36	Male	Mixed	53
Subject 37	Female	White	61
Subject 38	Female	Asian	47
Subject 39	Male	White	64
Subject 40	Female	White	26
Subject 41	Male	White	42
Subject 42	Male	White	64
Subject 43	Female	Mixed	46
Subject 44	Female	Black	45
Subject 45	Male	White	33
Subject 46	Male	Black	51
Subject 47	Male	Black	24
Subject 48	Male	Mixed	41
Subject 49	Male	Latin	43
Subject 50	Male	White	45

Subject ID	Gender	Race/ethnicity	Age
Subject 51	Male	White	34
Subject 52	Male	White	52
Subject 53	Male	Black	37
Subject 54	Female	White	38
Subject 55	Male	White	53
Subject 56	Female	Black	25
Subject 57	Female	Middle Eastern	29
Subject 58	Male	White	47
Subject 59	Male	Black	27
Subject 60	Male	White	34
Subject 61	Female	White	22
Subject 62	Female	White	54
Subject 63	Female	Asian	36
Subject 64	Male	Latin	25
Subject 65	Female	Chinese	37
Subject 66	Male	Indian	35
Subject 67	Female	Mixed	67
Subject 68	Female	White	51
Subject 69	Male	Chinese	38
Subject 70	Male	White	57

Table 8

Total Participants

Age Mean: 40.53	Race Code: Mixed	Race Code: Black	Race Code: Asian	Race Code: Hispanic	Race Code: White	Gender: Female
Totals	7	11	17	4	32	37
Represents:	0.1	0.157	0.24	0.071	0.442	.528
% of study	10%	15.7%	24%	7%	43%	52.8%
	Mixed	Black	Asian	Hispanic	White	Female

Presentation of Key Findings

The researcher developed a theoretical framework to illustrate the findings of the

extensive qualitative interviews conducted for this study (see Figure 10). As described in detail

by each research question below, a person pursuing a voluntary disorienting dilemma will

experience the aggregate feeling of hesitancy, as the Identity Impasse, The Free Fall, and Crowd

Condemnation are perceived. After pushing through a voluntary disorienting dilemma, a person

will experience the aggregate benefit of confidence as the voluntary disorienting dilemma illuminates identity, locates the ground, and clears condemnation. The benefits received from completing a voluntary disorienting dilemma were so robust that nearly all (93%) of participants indicated that they would pursue the voluntary disorienting dilemma again.

Figure 10

Theoretical Framework for Voluntary Disorienting Dilemmas
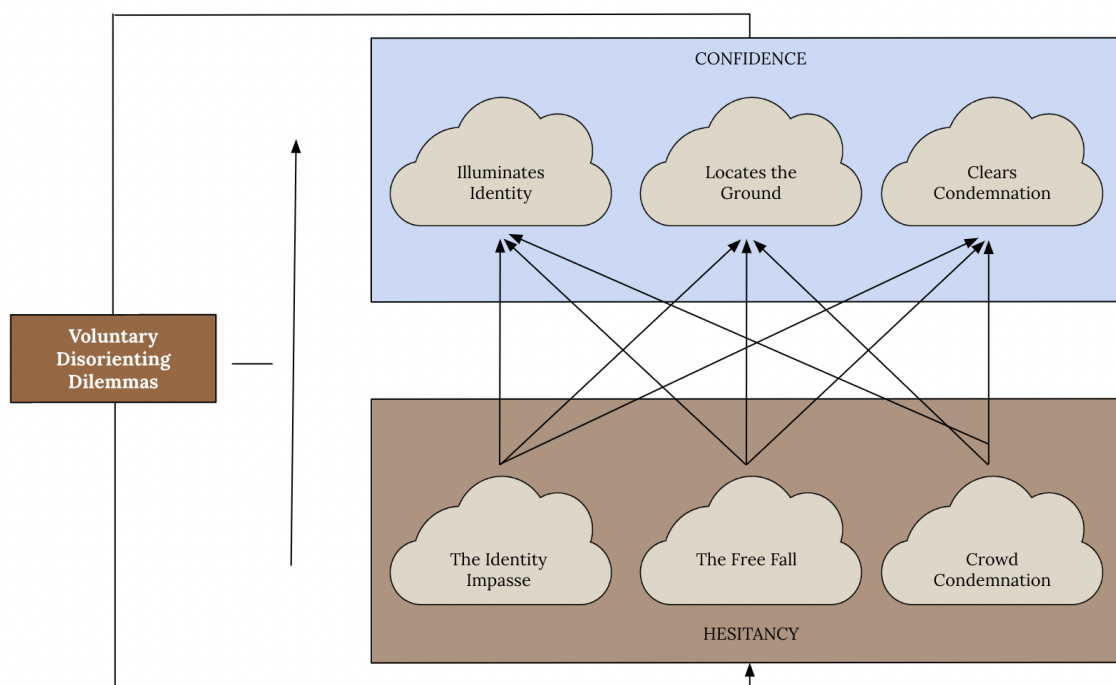
A few aspects of the theoretical framework for voluntary disorienting dilemmas require emphasis. First, the axial codes of hesitancy are not only related to the paired axial code of confidence. For instance, the benefit of clearing crowd condemnation does not only arise for a subject who experienced crowd condemnation. In many cases, subjects' experiences during a voluntary disorienting dilemma were complex. Hence, the arrows depicted in Figure 10 correspond to all axial codes within hesitancy and all axial codes of confidence, as further explored below. Second, subjects mentioned, discussed, or directly stated that voluntary

disorienting dilemmas impacted them positively, inspiring them to pursue more voluntary disorienting dilemmas. The benefit of voluntary disorienting dilemmas, namely, confidence, creates a cycle that compels subjects to consider future voluntary disorienting dilemmas and recount others that were already undertaken. This cycle is depicted by the arrow that points from the top of confidence to the start of hesitancy.

Findings for RQ1

The answers to RQ1 "What, if any, are the benefits of voluntary disorienting dilemmas?" emerged after rich and detailed discussions with participants. Although RQ3:"Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?" prompted immediate and enthusiastic responses from participants, the participants took longer to explore and answer this research question took longer for participants. The collective data revealed three axial codes as defined by the researcher: illuminates identity, locates the ground, and clears condemnation. These axial codes are paired with the axial codes determined in RQ2 as shown in Figure 11 and discussed further below. The three axial codes for RQ1 revealed "confidence" as the selective code, defined as "a feeling or consciousness of one's powers or of reliance on one's circumstances" (Merriam-Webster, n.d.-b). Figure 11 shows a summary of codes for RQ1 and participant data that support the three axial codes.

Figure 11

Summary of Open, Axial, and Selective Codes for RQ1

Summary of Open, Axial, and Selective Codes for RQ1

Open Codes	Axial Codes	Selective Codes
finding myself	Illuminates Identity	Confidence
values		
stability	Locates the Ground	
safe		
disregard	Clears Condemnation	
unimportant		
not caring		
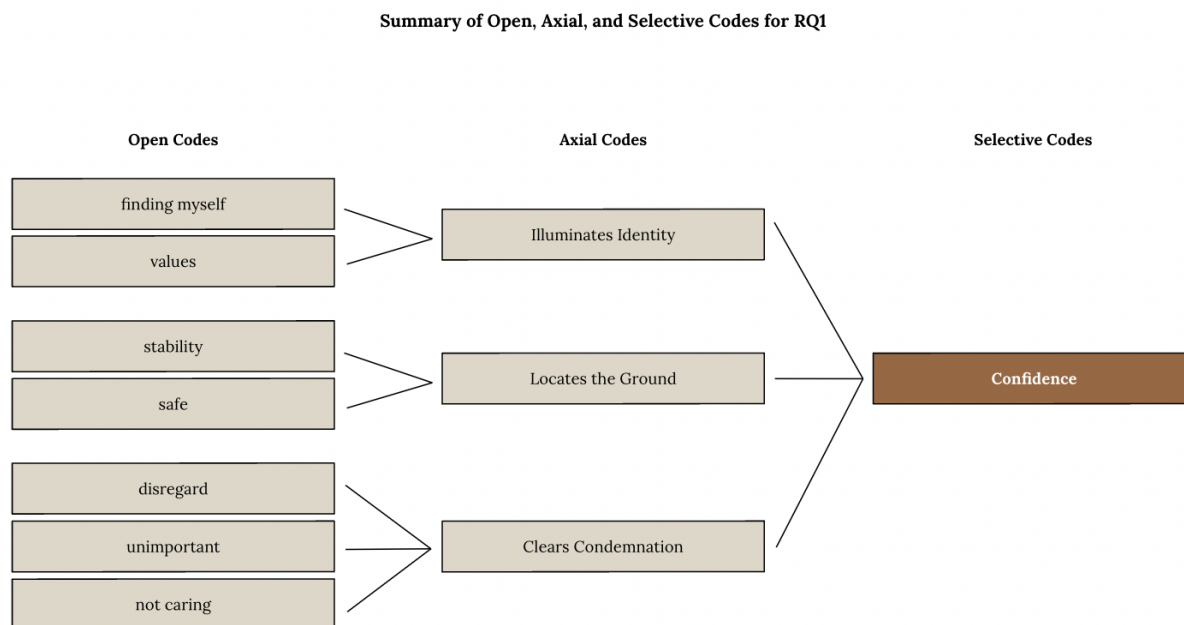
Illuminates Identity. A dominant theme participants spoke of when describing their voluntary disorienting dilemmas was related to who they believed themselves to be. After completing a voluntary disorienting dilemma, however, participants who cited exploration of their identities as initially uncomfortable found their identities to be more defined and/or expanded. The researcher defined identity as, "the distinguishing character or personality of an individual" and individuality as "the relation established by psychological identification; the condition of being the same with something described or asserted" (Merriam-Webster, n.d.-c). In experiencing voluntary disorienting dilemmas, participants "saw," "found," "uncovered," and "cemented" their identities. Participants' remarks were as follows:

- "This was about the gift of self-love and finally seeing it. It's candidly looking at myself, naked in a mirror and saying, oh my God, I am proud of the person inside and

outside of this body. And: I am not just a body, and that's important to who I am" (Participant #1).

- "I've gained a greater respect for myself, a greater sense of self-worth and a greater understanding of being true to what I really want, not settling" (Participant #2).

- "Of course when you get divorced, you question yourself 800 million times. But what I gained is I became more independent. I actually am an independent person. I lived my life. I even moved to the Caribbean" (Participant #15)

- "It made me understand how it felt to be other, how it felt to be different, how it felt to be stared at, how it felt to be just singled out because of what I looked like. And, that's an experience that you really have to force yourself to get. I now get that I am other and that is part of who I am" (Participant #19).

- "What I gained was I felt proud of myself and felt like I saw that kid that I once was and could say, 'no, I see you. I got you.' And I also felt like the spirit of my brother going 'that's my big sister!' and that is truly great" (Participant #35).

- "Do I have the ability to actually protect myself in this world? I doubted myself. It is such a deep space of doubt. Like here we are in the world, we are adults. Now we have our own agency and freewill and yet we are still vulnerable to people who try to take advantage of others. And you know what: I'm no longer that person" (Participant #44).

- "Well, I learned that as long as I put a strategy and a plan in place, I can execute. I'm an executor, and this experience showed me so" (Participant #53).

Locates the Ground. Another major theme of the benefits participants' experienced after completing voluntary disorienting dilemmas was a sense of "finding the ground," "feeling

stable," "finally seeing where I landed," and "no longer falling." The researcher defined this phenomenon as "locating the ground" or "locates the ground" from the word grounded, defined as "mentally and emotionally stable; admirably sensible, realistic, and unpretentious" (Merriam-Webster, n.d.-d). Participants' remarks included the following:

- "I had this image of what I thought it was going to be like, and then it happened, and I reflected back: I said, "oh, all right. It wasn't that bad. And I did very well. YOU can do hard things even when the fear is always going to be there. YOU can get through the fear" (Participant #6).

- "But that was like real learning for me. I thought I was ready. Not quite so much, but the experience actually gave me knowledge in terms of what my limits are and what I should and shouldn't do in the future. It feels oddly grounding" (Participant #13).

- "And so far, knock on wood: I'm going to probably make more money than I did when I was employed! So, in hindsight, I wish I'd done this sooner because there wasn't really anything to fear" (Participant #14).

- "I survived the uncomfortableness of doing it, but the long-term benefit is okay, this is very similar to what I've done before! The pace is a little bit different. The structure's different, but you're still talking to people, and I know how to do that.I can learn to be better at that, in that context. So for me, the gain was a significant amount of learning in a very short amount of time, which is the best kind in my opinion" (Participant #24).

- "I think what I learned is that even this person who is a pastor, who knows so much about the Bible, even he doesn't really have the answer. And I'm okay with that now" (Participant #40).

- "I feel like I'm a better person. After I've been through it and with the adrenaline still pumping, and I feel it gave me a sense of euphoria, a sense of mastery that was so calming and rewarding and serene" (Participant #52).

- "I think ultimately, the real mission for you as a human being is to be aligned with yourself. That is grounding. To make sure that what you do on a daily basis is very much aligned with your true self. And this is a life quest, but it's so hard" (Participant #64).

Clears Condemnation. Lastly, the final axial code derived from RQ1 related to ignoring, dismissing, releasing, or "not caring" about what others thought or how they judged the participant. Condemnation is defined in the RQ2 section. Clearing can be defined here as "the act of becoming untroubled, serene," (Merriam-Webster, n.d.-e, para. 1). Once participants finished voluntary disorienting dilemmas, which initially prompted fear and concern about potential condemnation from others, participants experienced a serene state of mind that was not "obsessed" or "wound up" about others' judgments. A selection of responses is as follows:

- "This experience helped me get rid of that whole imposter syndrome. You know? I found out that I am the person to do this. I am adequate. It doesn't matter if other people think otherwise" (Participant #8).

- "Even if it was not graceful, per se, addressing it directly and head on and creating sort of a conflict or a friction felt right, and I didn't care if others didn't agree. That's what I gained" (Participant #9).

- "So you started a new job and you feel like you've got something to prove. And I realized real quickly that I am as good as I thought. I was the right hire. And so there

was a level of confidence in my ability to step in and ignore others who maybe thought otherwise" (Participant #10).

- "I gained the satisfaction that they have the complete picture, that it was not something new. I didn't need them to have an opinion about me anymore. It showed that it was a character issue with him, his entire time on the bench. It was not about me, at least in my opinion" (Participant #17).

- "I think one of the things I think that I gained was I think I found my voice. I've always been kind of outgoing and opinionated, but I feel like through this, I really found my voice, and it helped me figure out what's important for me both personally and professionally, which is: I don't need to worry about what other people think" (Participant #21).

- "I think what I gain over time, self confidence, it gets easier every time. And I just reiterate to myself that like, I'm here doing me, like I'm doing what I wanna do for myself. Like it's not, it's nobody else's business. Like I should be proud of myself for putting myself out there and getting out there" (Participant #27).

- "I just tell myself, 'Let's just embarrass myself more.' And now I think I feel comfortable. I think this is something that I have done. You get more confidence and keep yourself on your toes, not get complacent that you have a lot to learn. And really: just knowing it doesn't matter so much what others think. Again, embarrass yourself" (Participant #31).

- "I think a little part of me has gained confidence in that. I think it's putting my foot down in confidence and that I have to set boundaries in order to have a good

relationship with my family. And it's okay to have confrontation and to have them have different opinions about me" (Participant #57).

- "I guess I gained the importance of looking out for yourself. I think that trading popularity for respect is worth it. Ultimately, I was able to lay my head down at night knowing that, yes, this is uncomfortable, but it is far better having people know where I stand, whatever they think of that" (Participant #60).

- "I had never surrounded myself with entrepreneurs that were as great or greater than myself in terms of their knowledge, expertise, experience, and abilities. And if you're going to expand and grow professionally, you need to surround yourself with people that are at least at your level or above and not below. But: it doesn't matter what they think of you, even though they know they are better" (Participant #68).

To conclude, the researcher deduced three axial codes from RQ1: "What, if any, are the benefits of voluntary disorienting dilemmas?", which included illuminates identity, locates the ground, and clears condemnation. The benefits of voluntary disorienting dilemmas helped participants see their true selves, stabilize their lives, and forget the possible scorn or judgment of others, whether known or unknown to participants. The three axial codes formed the reasoning to select "confidence" as the selective code for the benefits of voluntary disorienting dilemmas. The axial and selective codes found from RQ2 are directly related to those of RQ1.

Findings for RQ2

RQ2 was, "What is the meaning(s) of voluntary disorienting dilemmas?" Compared to previous research by Ensign that marked the situations or contexts of participants in voluntary disorienting dilemmas, such as study abroad trips, adult education courses, and career changes, this research question sought to answer a deeper level of the various situations or contexts of the

voluntary disorienting dilemmas, with "meaning" defined as, "significant quality" (Merriam-Webster, n.d.-f). A discussion of the differences of Ensigns' contexts versus meaning is presented in this section. The findings are also covered in Chapter 5.

Participants' answers to the question regarding the meaning of their voluntary disorienting dilemmas formed three axial codes as deduced by the researcher: the Identity Impasse, the Free Fall, and Crowd Condemnation. The selective theme decided by the researcher was hesitant, defined as "slow to act or proceed (as from fear, indecision, or unwillingness)" (Merriam-Webster, n.d.-g, para. 1). Figure 12 shows a summary of codes for RQ2. A definition of each of the three axial codes and their supporting evidence follows.

Figure 12

Summary of Open, Axial, and Selective Codes for RQ2

Summary of Open, Axial, and Selective Codes for RQ2

Open Codes	Axial Codes	Selective Codes
self doubt	The Identity Impasse	Hesitantany
uneasy		
leaping	The Free Fall	
unknown		
Judgement	Crowd Condemnation	
Shunning		
Devalued		
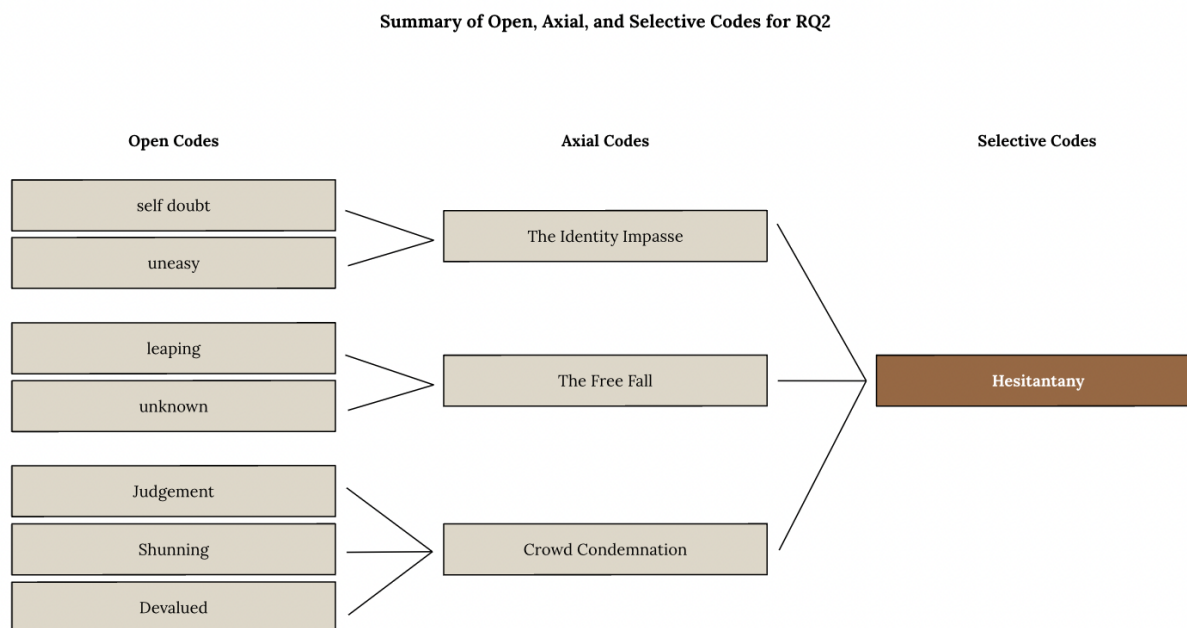
The Identity Impasse. Participants often described voluntary disorienting dilemmas in which they struggled with an internal conflict related to self-identity. For instance, a participant who identified as a "good mother" found it difficult to show up for a pole dancing class; a "deeply devoted Christian" was challenged by questioning her belief in god and becoming an agnostic; a native New Yorker was conflicted by moving across the country and losing the identity of being a "tough New Yorker" and abandoning himself. The researcher deduced this phenomenon as an Identity Impasse. Unlike an "identity crisis" in which people endure a period of "uncertainty or confusion in a person's life," an Identity Impasse is short lived and in direct conflict with the identity a person currently holds (Marcia, 1966). Merriam Webster's definition of "impasse" is "a predicament affording no obvious escape; deadlock; an impassable road or way," an Identity Impasse is a moment in time when a person questions their identity because of the voluntary disorienting dilemma before them. This phenomenon is a moment during which an

individual ponders, "If I do X, then I will not be Y, which I thought I was/am." The Identity

Impasse is an exceedingly uncomfortable moment but is often short lived, ranging from less than

a minute or a few weeks compared to an identity crisis, which may last for years. A few

indications of the Identity Impasse that emerged from the interviews are as follows:

- "I don't think I had ever felt so uncomfortable in my own body. There's this idea of
  shame, um, for a woman's body. Like you're shameful or you're dirty because you do
  this. And this is just not what I should do as a proper professional. This is not what
  refined women do" (Participant #1).

- "I didn't know whether or not I was adequate as a Christian. I was uncomfortable
  because I felt, 'Oh my goodness. Do I know enough about this to still be a person of
  faith?" (Participant #7).

- "You know, life is interesting for all of us. My motto is: you've gotta stay true to
  yourself and you have to face those moments of uncomfortableness when you think
  you're something or not. Cause when you're uncomfortable, the world is telling you
  something. Something needs to change about yourself, perhaps" (Participant #15).

- "I think what was uncomfortable about it is I am also a mother. My children were
  seven and nine, so I had one in two in school as well as trying to be a full time career
  woman?" (Participant #18).

- "So there was a departure from myself. It was like an identity point, kinda a sense of
  giving up that came with it. If I left this job, then I would be failing in some way.
  That's kind of similar to, but different from, if I go to this thing, this is my new
  identity I have embraced" (Participant #25).

- "My colleague did and said something on two calls that I wasn't comfortable with, and I am a people pleaser. I don't like to confront people in general, either in my personal or in my professional life but I knew that this would become a wound that would fester if I didn't address it. So I proactively called him and expressed my displeasure about the two things that happened and it was extremely uncomfortable for me to do it as such a people pleaser, which I don't even like about myself" (Participant #46).

- "Because I had my entire identity centered in New York City, and if I went to California, who would I really be?" (Participant #48).

- "And I do not live an adventurous life, right? I'm 47, and I have 3 kids. We go to soccer games on Saturday. That's what we do. That is who I am, the soccer dad. So I could not fathom spending a lot of time outside my comfort zone and doing this" (Participant #58).

- "I didn't know that I could experience something like this because I'm such a free person. Freedom for me is maybe the top value I have in my life. And I think if you asked me to choose one value, it would be freedom. So I could have never guessed that I would feel trapped, after a choice I made myself if that makes sense" (Participant #64).

- "I think it was uncomfortable because you cannot react to something that you don't know for sure. So the lack of conversation makes it extremely uncomfortable. I'm also just not a good person with silences; I want to fill them and keep the other person happy with me because that's who I am" (Participant #65).

The Free Fall. Many participants described a feeling of being out of control if they were to pursue the voluntary disorienting dilemma before them. "Out of control," was, however, not the correct code for this phenomenon as participants were fully aware they were in control of "walking through the door," "taking a leap," or "making this conscious decision" about a voluntary disorienting dilemma. Therefore, the researcher hence determined this axial code as the Free Fall, a willingness to step into the unknown but with no known ground beneath. The following are descriptions of the Free Fall from participants' interviews:

- "It's one of those really interesting things where it doesn't matter how much effort you put into it, your body's going to do what it's going to do. It is totally out of your control, and that is very uncomfortable" (Participant #2).

- "And I'm not, I don't even know what I was scared of per se, you know, but I think it was just maybe the loss of control or that the 'not knowing' how it's going to affect me or all the things. You're sort of jumping into an unknown territory that, you know, feels uncomfortable like this complete loss of control. I mean the irony is none of us ever have control ever" (Participant #4).

- "It was jumping into uncertainty, even though I was the one doing it!" (Participant #12).

- "It was uncomfortable because I have a family and kids to take care of. Taking a risk could leave me with nothing, and then how would I have stability in my life and for my kids?" (Participant #20).

- "I'm in a vulnerable position, and I felt like I was out of control. I think that's uncomfortable: letting my guard down in front of my kids and not knowing what's on the other side even though I allowed it" (Participant #28).

- "You know when you have something that you've put a lot of time and energy into, and it's failing? It's a moment of thinking the world is gonna come to an end, and I'm gonna bankrupt that concept completely" (Participant #30).

- "It was just the unknown. I didn't know anyone back home, the job market, really nothing" (Participant #41).

- "I had to take a jump and see what happens. Honestly, everything is kind of working the way that's supposed to now" (Participant #42).

- "It was pretty, pretty big, crazy leap to move to a high desert area with a kid" (Participant #43).

- "It starts with control. I would say because of the type of person I am, I do like to have a good level of control over the setting and the situation. It just makes me feel more comfortable generally, and this was a situation where I had to have no control" (Participant #47).

- "Initially jumping into it and taking a writing course with a bunch of writing professionals is extremely uncomfortable. I didn't know what to expect" (Participant #69).

Crowd Condemnation. The researcher interpreted the last and most dominant axial code for RQ2: What are the contexts of voluntary disorienting dilemmas? as Crowd Condemnation. Condemnation is defined as "to declare to be reprehensible, wrong, or evil usually after weighing evidence and without reservation," (Merriam-Webster, n.d.-e). The researcher also used the following definition of "crowd": "a large number of persons especially when collected together" (Merriam-Webster, n.d.-h). Throughout the interviews, the researcher noticed that participants described a concern or fear of being judged by another person, a group, an audience, collectively

determined as Crowd Condemnation. The participants often projected or assumed Crowd Condemnation; they did not assign or expect the "crowd" to judge them in any way. The following excerpts from the participants' interviews illustrate Crowd Condemnation:

- "I was uncomfortable because I was in the light and I was exposed. How were they seeing me feeling so uncomfortable? How am I being viewed?" (Participant #1).

- "I just had a deep fear of retaliation from them" (Participant #7).

- "I think when you spend as long as you do and you have two babies and you watch other people have babies at your workplace … you have a sense of friendship in addition to professional relationships, but those can be gone in a moment if I do this and leave" (Participant #10).

- "I would say I had always been guarded because I had been in situations where I knew the other person or at least the environment wasn't one that was accepting. I didn't want to put myself in that position of that judging" (Participant #21).

- "There's the self versus society and there's the self versus say close friends and family. So, for each layer, self versus society, it feels like this is what you're supposed to do. This is what you're supposed to know. You're supposed to have some sort of direction when you barely just figured out how to get through high school. I think people will just shun you if you don't have a passion by the time you're 18 or a goal by the time you're 18. And I didn't have that yet" (Participant #24).

- "This situation for me was about the fear of not being listened to and the fear of being misinterpreted, mainly. It's your mother-in-law: this isn't a relationship that you can just fully reject or deny" (Participant #25).

- "The uncomfortable part was: I may go through this program and once again, see people make relationships with these strangers that they've never met before which then evolve and grow. And I may not be one of those people because they judge and don't accept me for who I am, if I present that" (Participant #29).

- "My fear was that I would be judged. I will not be respected by this group, possibly ever, and how could I work in that environment?" (Participant #34).

- "It's clear you're not one of them. You're white. Obviously you can't be part of that community. And I just realized how unwoke I was and how unincluded I would forever be if I said something" (Participant #37).

- "Because my personality is such that I value the human experience. And what made me uncomfortable was knowing that I was going to be creating a negative experience. Like I couldn't figure out that there'd be any way that this would be seen as a positive by anyone in that group" (Participant #38).

- "It was an uncomfortable feeling like I am going against something that they (in the church) think is absolutely right, which is that being gay is sinful. I would probably never be invited back, I was sure" (Participant #40).

- "I was able to see just how toxic my relationship with my agent was. But I had kept filling the space over the last seven years with other things to distract me so I wouldn't have to speak truth to power. I was afraid that he would retaliate" (Participant #44).

- "At the moment I was so unbelievably scared because I was looking out into a group of a thousand people who constantly kept reaching up to their ears, listening to a translation, judging me" (Participant #45).

- "I don't mind confronting my sister about stuff. This is an example of the same situation which has happened to me before. Particularly with money. I have to justify myself and defend myself when there's not an accusation even happening from someone in reality" (Participant #54).

- "I truly felt like I was letting my team down. And it's actually even deeper than that. Everyone's going through their own things in life, of course, or it's been a crazy year and a half, sure. But doing this was like I was not showing up to someone's wedding or their baby shower" (Participant #59).

- "It was feeling judged. I think the people that I was in the program with were about as awesome as you can get in terms of achievements. I was definitely my harshest critic over anybody else and thought they'd believe I shouldn't be there" (Participant #68).

In summary, three axial codes arose for RQ2: What are the contexts of voluntary disorienting dilemmas? The first code was the Identity Impasse, a moment in time when a person questions their identity because of the voluntary disorienting dilemma before them. The second identified axial code was the Free Fall, a willingness to step into the unknown but with no known ground beneath. The last axial code was Crowd Condemnation, the concern or fear of being judged by another person, a group, an audience. The researcher determined hesitancy, defined as slow to act or proceed (as from fear, indecision, or unwillingness), as the selective code for RQ2.

Findings for RQ3

The final question of this study was RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?. As Table 8 shows, 93% of participants would repeat their voluntary disorienting dilemmas again. RQ1 addressed the benefits of voluntary disorienting dilemmas. The additional question posed to participants about why they would

pursue or not pursue their voluntary disorienting dilemmas was redundant and has been included

in the findings section for RQ1 above. Remarks from participants regarding whether they would

repeat their voluntary disorienting dilemmas are presented below.

Table 9

Study Participants' Answers to RQ3

Subject ID	Answer	Code "1" for Yes
Subject 1	Absolutely	1
Subject 2	Yeah, really. I always have hope	1
Subject 3	A hundred percent	1
Subject 4	Yes	1
Subject 5	Yes	1
Subject 6	Yes	1
Subject 7	Yes	1
Subject 8	Yes	1
Subject 9	A hundred percent	1
Subject 10	A hundred percent	1
Subject 11	Well, yeah	1
Subject 12	Totally. I would totally say	1
Subject 13	Absolutely	1
Subject 14	Oh, absolutely. Hundred times over	1
Subject 15	Absolutely	1
Subject 16	That's a hard question to answer	0
Subject 17	A hundred percent	1
Subject 18	I would do it again. Crazy, it sounds	1
Subject 19	I would do it again	1
Subject 20	Oh, yes.	1
Subject 21	You know, I would	1
Subject 22	Of course I would	1
Subject 23	Absolutely	1
Subject 24	I think I would	1
Subject 25	Oh, absolutely. Yeah	1
Subject 26	I would do it again	1
Subject 27	Absolutely	1
Subject 28	For sure	1
Subject 29	Yeah	1
Subject 30	Yes, I would do it again	0
Subject 31	Hopefully not	1
Subject 32	For the right reason, I would	1
Subject 33	Absolutely	1
Subject 34	I would	1
Subject 35	Yes	1

Subject ID	Answer	Code "1" for Yes
Subject 36	A hundred percent	1
Subject 37	For sure. It's the right choice	1
Subject 38	Yes. I would watch the videos again	1
Subject 39	Not willingly	0
Subject 40	Oh yeah	1
Subject 41	Yes	1
Subject 42	I would do all of those again	1
Subject 43	Yes	1
Subject 44	Yes	1
Subject 45	Absolutely	1
Subject 46	Yes	1
Subject 47	Yes, but it will remain difficult	1
Subject 48	NO. I would NOT do this	0
Subject 49	Yes	1
Subject 50	I would	1
Subject 51	YES, clearly yes	1
Subject 52	I would do it again	1
Subject 53	I cope with the world better, yes	1
Subject 54	Absolutely!	1
Subject 55	No, if I don't have to be	0
Subject 56	I wouldn't be uncomfortable again	0
Subject 57	No, it just showed me who he is	0
Subject 58	I don't want to deal with it	0
Subject 59	I would definitely do it again	1
Subject 60	Yes, I would	1
Subject 61	A thousand percent	1
Subject 62	Yes	1
Subject 63	I would still push myself to leave	0
Subject 64	Oh shit. No	0
Subject 65	Absolutely. Yes	1
Subject 66	No	0
Subject 67	Yes, totally	1
Subject 68	I would do it again	1
Subject 69	Yes	1
Subject 70	I would	1

Note. Total codes of "1" for yes: 65; % participants to repeat voluntary disorienting dilemma: 92.857

Chapter Summary

This chapter included the findings of this qualitative grounded theory study, which

centered on voluntary disorienting dilemmas. Three research questions guided the exploration of

the benefits of voluntary disorienting dilemmas, the contexts of voluntary disorienting dilemmas,

and why participants would repeat or not repeat a voluntary disorienting dilemma. Most notably, 93% of participants stated that they would repeat their voluntary disorienting dilemmas. As described by participants and deduced by the researcher, an Identity Impasse, Free Fall, and Crowd Condemnation are the meanings of nearly all voluntary disorienting dilemmas, which cause hesitation. The benefits of persisting through a voluntary disorienting dilemma, however, is a collective feeling of confidence caused by a greater sense of identity, groundedness, and serenity. The final chapter of this study, Chapter 5, contains details of the implications and recommendations for future research on voluntary disorienting dilemmas.

Chapter 5: Discussion of Findings

Chapter Overview

The aim of this qualitative grounded theory study was to explore a subset of the first step of transformational learning, the voluntary disorienting dilemma. Although research pertaining to involuntary disorienting dilemmas is abundant, little is understood about the benefits, contexts, and outcomes of voluntary disorienting dilemmas. Using the Straussian grounded theory approach (Strauss & Corbin, 1998), the researcher applied a three-stage coding methodology of open, axial, and selective coding to produce a new theory of voluntary disorienting dilemmas (Figure 10). The results of the study showed notable final findings, discussed in the Final Findings section below.

As noted by Simon and Goes (2018), the final chapter of a dissertation covers the study's significance, comparisons, and opportunities for further research. After the context and final findings are discussed, this chapter continues with comparisons, implications, recommendations for future research. Chapter 5 concludes with a chapter summary.

Context

The purpose of this qualitative grounded theory study was to uncover the benefits and meanings of voluntary disorienting dilemmas. The main research question (RQ1) posed in this study was RQ1: What, if any, are the benefits of voluntary disorienting dilemmas? Two further questions guided this study: RQ2: What is the meaning(s) of voluntary disorienting dilemmas? and RQ3: Would subjects repeat their voluntary disorienting dilemmas again? Why or why not?

This study sample consisted of 70 participants recruited from LinkedIn, a digital platform, and interviewed via Zoom, a communications digital platform, in April 2023.

Participants were diverse in age, race, and gender and met the study's four criteria that are as follows:

- At least 18 years of age

- Lives full time in the United States

- Speaks English

- Able to participate in an interview via Zoom

Final Findings

The three guiding research questions of this study, examined using grounded theory and through extensive interviews with 70 participants, led to the following three main findings:

- F1 (linked to RQ1): The main benefit of voluntary disorienting dilemmas is confidence, emerging from experiences that helped subjects illuminate their identities, locate the ground, and clear away the threat or fear of condemnation.

- F2 (linked to RQ2): The meaning of voluntary disorienting dilemmas is hesitancy, expressed in the Identity Impasse, the Free Fall, and Crowd Condemnation that subjects felt throughout their voluntary disorienting dilemmas.

- F3 (linked to RQ3): 93% of subjects would repeat their voluntary disorienting dilemmas because of the main benefit of confidence.

In addition, many participants expanded on their experiences with voluntary disorienting dilemmas without being prompted with specific questions. Mentions of growth, confidence, stability, and appreciation emerged as participants discussed the benefits of voluntary disorienting dilemmas and their lived experiences. These feelings and finding are best encapsulated by the participants' direct remarks as follows:

- "Ultimately I know I'm not in control, and I have to acquiesce to the will of God. I can give in. I don't know what's best for me. So I can now trust that and I can have peace with what God determines" (Participant #2).

- "I don't think I've ever regretted having an "uncomfortable experience." You always overestimate the downside of risk and when you end up doing something and even if you fail or even if it goes bad, it's never as bad as you think" (Participant #4).

- "I believe that if you don't really embrace your fears and move forward with whatever it is that makes you feel uncomfortable, you'll never learn" (Participant #8).

- "I liked the idea of pushing myself into something new, to get uncomfortable again. It gets me into a new chapter where I'm a little bit uncomfortable" (Participant #10).

- "It opens up the world of opportunities in terms of exploring what I can bring to the table. You can always learn new things and do new things" (Participant #17).

- "I would go through being uncomfortable again because it stretched my abilities and my know-how, and my ability to also kind of lean into myself and depend on myself more than relying on what other people are telling me what to do or who to be" (Participant #20).

- "You have to push yourself to be in those spots where growth can happen. I don't think one should shy away from the uncomfortableness of something, whether that's a conversation or a conflict or any of those sorts of things" (Participant #24).

- "I see growth from discomfort and so I actually embrace it" (Participant #28).

- "I'm a little more confident in knowing I've got a pretty strong value system and it guides me in my decision making processes. I'll do what I need to do, to drive our business in the right way" (Participant #30).

- When I look back on taking that on, it really solidified that I'm a courageous person. And when I'm not feeling courageous, I can go back to that and go look and say, 'remember, you did that thing,' and that feels great" (Participant 56).

- "I think it really makes me question: what experiences and opportunities I say no to, because if one moment of 'yes' can change my life or has changed my life so monumentally, I wonder what are the things I shouldn't say 'no' to in the future" (Participant #62).

- "I think that the best thing I've learned is that the more uncomfortable things I have, the more I grow as an individual. I have such gratitude for discomfort that I never had before (Participant #67).

- "I had never surrounded myself with entrepreneurs that were as great or greater than myself in terms of their knowledge, expertise, experience, and abilities. And if you're going to expand and grow professionally, you need to surround yourself with people that are at least at your level or above and not below. And so that's one thing that I learned. And: Confidence is absolutely somewhere tied into all of this" (Participant #69).

One major result worth emphasizing further is confidence flywheel. As depicted in Figure 10 and alluded to in the participants' remarks above, a "confidence flywheel" seems to emerge in the remarks of those who practice voluntary disorienting dilemmas. That is, the more an individual undertakes voluntary disorienting dilemmas, the more the result of confidence propels the individual to pursue more voluntary disorienting dilemmas. This finding is not surprising as plenty of research supports that behavior that results in positive outcomes, such as in exercise (Ruegsegger & Booth, 2018) and feedback (Peifer et al., 2020), usually spurs the

behavior again. The novelty of the findings in this study is difficult to compare to others, as voluntary disorienting dilemmas have not been robustly studied. In the following section, however, the researcher offers suggestions and insights, which have implications for other areas of research and examination.

Comparisons and Implications

The findings of this study should be compared to previously discussed theories and constructs presented in the literature review and throughout this study. In doing so, the findings of this study would be better contextualized and understood. Though research on voluntary disorienting dilemmas is scanty, as outlined in Chapter 2, this section focuses Ensign's study, Maslow's hierarchy of needs, and Mezirow's theory of transformational learning in comparison to the three key findings of this study, which are as follows:

- F1 (linked to RQ1): The main benefit of voluntary disorienting dilemmas is confidence, emerging from experiences that helped subjects illuminate their identities, locate the ground, and clear away the threat or fear of condemnation.

- F2 (linked to RQ2): The meaning of voluntary disorienting dilemmas is hesitancy, expressed in the Identity Impasse, the Free Fall, and Crowd Condemnation that subjects felt throughout their voluntary disorienting dilemmas.

- F3 (linked to RQ3): 93% of subjects would repeat their voluntary disorienting dilemmas because of the main benefit of confidence.

Comparison with Ensign's Work

Ensign (2019) considered voluntary disorienting dilemmas' contexts or circumstances that form the setting for an event. The Disorientation Index, created by Ensign after an analysis of only 82 studies on disorienting dilemmas, revealed that only 45 of the disorienting dilemmas

were voluntary. Ensign deduced 11 contexts from the contexts of these voluntary disorienting

dilemmas: "study abroad programs, professional development, career, adult learning class or

experience, entire college experience, higher education class reading/poetry/television, identity

and human development, workplace, environmental experience, and race/class/gender and

political experiences" (p. 166).

Although this study pertained to the meanings of voluntary disorienting dilemmas,

regardless of their settings or contexts, the researcher considered coding the contexts of this

study's participants valuable to this study. Table 9 reveals the various contexts described by this

study's participants using Ensign's codes and new ones, as assessed by the researcher.

Table 10

Study Participants' Contexts and Codes

Subject ID	Answer	Ensign Code or Other
Subject 1	Pole dancing	NE
Subject 2	Engaging in my third round of IVF	F
Subject 3	Divorce	F
Subject 4	Doing mushrooms	NE
Subject 5	Moving to a new country	M
Subject 6	Sky diving	NE
Subject 7	Reporting investment fraud	M
Subject 8	Taking a job at a Jewish organization	9
Subject 9	Values clash	11
Subject 10	Learning who your friends are	F
Subject 11	Getting divorced	F
Subject 12	Quitting my job when I was also trying to get pregnant	F
Subject 13	Learning how to ski	10
Subject 14	Quitting job to start new enterprise	3
Subject 15	Getting divorced	F
Subject 16	Changing careers	3
Subject 17	Reporting on a judge who sexually abused others	NE
Subject ID	Answer	Ensign Code or Other
Subject 18	Getting PhD and getting divorced with THREE kids	F

Subject ID	Answer	Ensign Code or Other
Subject 19	Gave a speech in Chinese in front of 350 people	NE
Subject 20	Taking a lower pay job beyond my capabilities	3
Subject 21	Disclosing I was gay to a new employer	9
Subject 22	Becoming a coach	3
Subject 23	Forcing my late mother into long-term care.	F
Subject 24	Choosing my major	5
Subject 25	Presenting research	9
Subject 26	Confronting mother in law with different politics	11
Subject 27	New job	3
Subject 28	Using certain equipment at the gym	NE
Subject 29	Apologizing to my kids and swallowing my pride	F
Subject 30	Being vulnerable with my classmates	4
Subject 31	Shutting down a restaurant	$
Subject 32	Changing industries	3
Subject 33	Starting a business	3
Subject 34	Meeting with a very famous person who is bipolar	NE
Subject 35	Values clash, not being compassionate	11
Subject 36	Confronting my mother	F
Subject 37	Charging money when I didn't like the work at all	$
Subject 38	Watching intense content for son	6
Subject 39	Eliminate a department in our organization	9
Subject 40	Working out 6 times a day	NE
Subject 41	Abandoning my faith	F
Subject 42	Moving back home	M
Subject 43	Confronting business partner	11
Subject 44	Moving with no job	3
Subject 45	Firing my agent	$
Subject 46	Giving a big speech in China	3
Subject 47	Calling out racism	11
Subject 48	Being 1st day on the job with a big client	3
Subject 49	Moving to California	M
Subject 50	Decided to have a child after being separated from my wife	F

| Subject ID	Answer	Ensign Code or Other
Subject 51	Writing a book	NE
Subject 52	Laying off people	9
Subject 53	Rock climbing but afraid of heights	NE
Subject 54	Starting a VC fund	3
Subject 55	Money dispute with family	$
Subject 56	Going to a game when COVID was still happening	F
Subject 57	Rejection from family	F
Subject 58	Boundaries within family	F
Subject 59	Buying a house we couldn't perhaps afford	$
Subject 60	Couldn't attend a game	NE
Subject 61	Confronting a best friend	F
Subject 62	Moshing at a big party	NE
Subject 63	Leaving a company after 22 years	3
Subject 64	Leaving home for the first time	M
Subject 65	Moving to another country for love	M
Subject 66	Canceling an interview	3
Subject 67	Changing careers	3
Subject 68	Doing a photoshoot	NE
Subject 69	Presenting results on a weekly basis to colleagues	3
Subject 70	Career change	3
Subject 71	Retiring and losing value	3

Note. 1 = Ensign's code for "Study abroad and international service"; 2 = Ensign's code for "Professional develop"; 3 = Ensign's code for "Career"; 4 = Ensign's code for "Adult learning class or experience"; 5 = Ensign's code for "Entire college experience"; 6 = Ensign's code for "Reading, poetry, TV"; 7 = Ensign's code for "Higher education class"; 8 = Ensign's code for "Identity and human development"; 9 = Ensign's code for "Workplace"; 10 = Ensign's code for "Environmental experience"; 11 = Ensign's code for "Race, class, gender and political experience"; $ = Money-related context; M = Move-related context, such as moving to another country or city; NE = New experiences such as sky diving or using new gym equipment; F = Family-related context, such as choosing to get divorced.

Notable comparisons are clear with the coding of contexts for this study in contrast to

Ensign's research. First, as shown in Figure 13, only 30 of the 70 participants' contexts in this

study pertained to Ensign's codes. Most of the contexts were related to career (16 in this study),

workplace (90 in this study), and race, class, gender and political experiences (five in this study).

The dominance of career and workplace contexts may be related to this study's recruitment,

which occurred on LinkedIn, a career and workplace digital platform. Second, and far more

intriguing to the researcher, 40 of the 70 contexts within this study related to contexts of money (five occurrences), moving (six occurrences), new experiences (13 occurrences), and family (16 occurrences). The reason for the emergence of these four additional contexts is unknown but perhaps directly correlated to the lack of research on voluntary disorienting dilemmas. The participants recruited were not current students or academics who may have been in study abroad programs or developing their skills as educators, which could be the reason for not observing more additions to these top contexts, per Ensign's research. Lastly, money, moving, new experiences, and family clearly are not related to Ensign's findings but are deeply associated with another theory worth exploring.

Figure 13

Ensign's Original Coding With This Study's Contexts
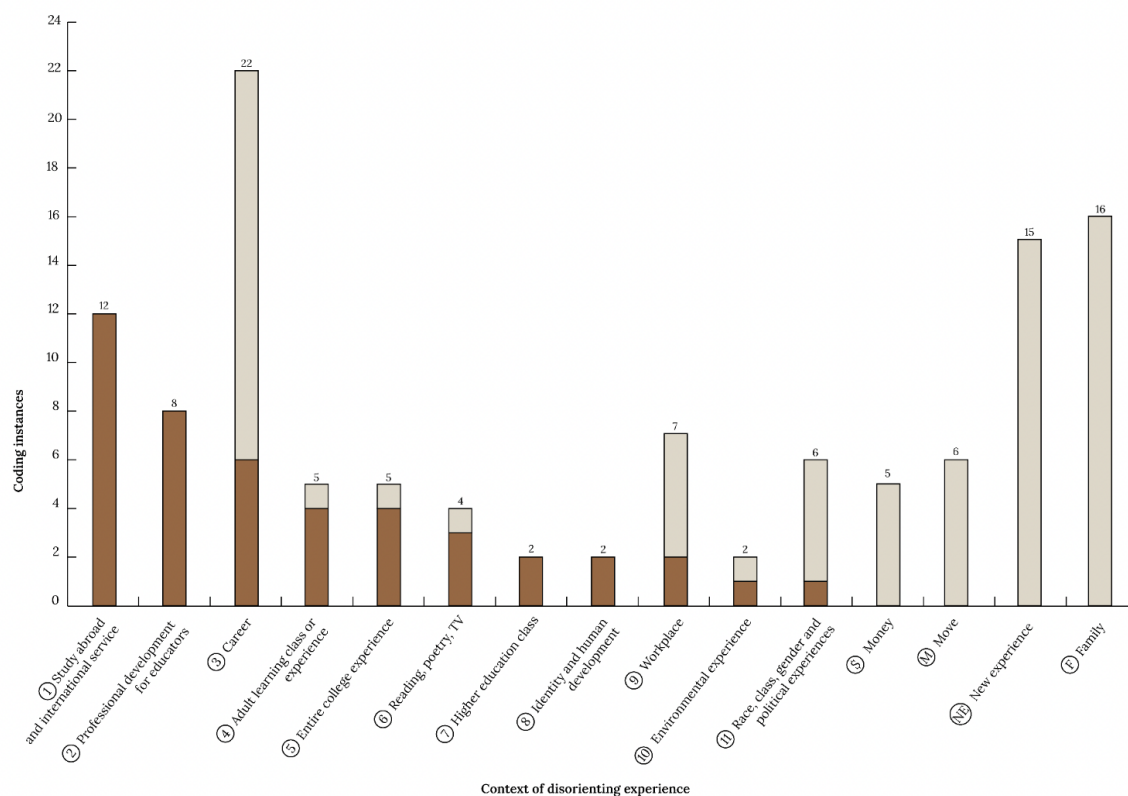
Note. This figure combines Ensign's original 45 voluntary disorienting dilemmas with 70 of the contexts noted in the current study.

Comparison with Maslow's Hierarchy of Needs

The researcher did not initially consider Maslow's hierarchy of needs for this study. Maslow did not influence Mezirow's work nor was Maslow's research related to learning, transformation, or dilemmas. Rather, Maslow's (1943) hierarchy of needs, a five-level model famously depicted in pyramid form, is considered a motivational theory in the realm of psychology. The results and contexts that emerged from this study, however, compelled the researcher to consider Maslow's hierarchy of needs.

An overview of Maslow's hierarchy is first needed. According to Maslow (1943), humans possess five basic to complex needs, which are related to one another but achievable only by meeting the most basic needs first. When the most "prepotent goal is realized," the next higher of the five needs surfaces as, "man is a perpetually wanting animal" (Maslow, 1943, p. 377). The first need is physiological, related to having enough food, water, sleep, air, and the like to live (Maslow, 1943). The second need, stacked upon the first block of the pyramid, is safety, related to security, law, freedom from fear, and stability (Maslow, 1943). The third level of Maslow's hierarchy of needs is love and belonging, only obtained after physiological and safety needs are met and related to trust, acceptance, affection, and being part of a group (Maslow, 1943). The fourth need is "esteem," described by Maslow in two forms: (a) esteem for oneself such as dignity, achievement, independence, and proficiency and (b) the need for reputation or respect from others (Maslow, 1943). The last level of Maslow's hierarchy of needs is "self-actualization," the pursuit of reaching one's full potential or "to become everything one is capable of becoming" (Maslow, 1987, p. 64).

Maslow's hierarchy of needs is depicted in Figure 14 alongside the researcher's added pyramid that suggests a significant expansion of the original model related to voluntary

disorienting dilemmas. First, this study's majority of contexts, as discussed in the section above, are related to money (five occurrences), moving (six occurrences), workplace (five occurrences), race, class, gender and political experiences (five occurrences), new experiences (13 occurrences), family (16 occurrences), and career (16 occurrences). All these contexts relate to the first three needs of Maslow's pyramid: physiological, safety, and love and belonging. Pursuing a new job, moving to a new place where shelter is not established, confronting family, and not having the resources to provide for one's life each pertain to these first three realms.
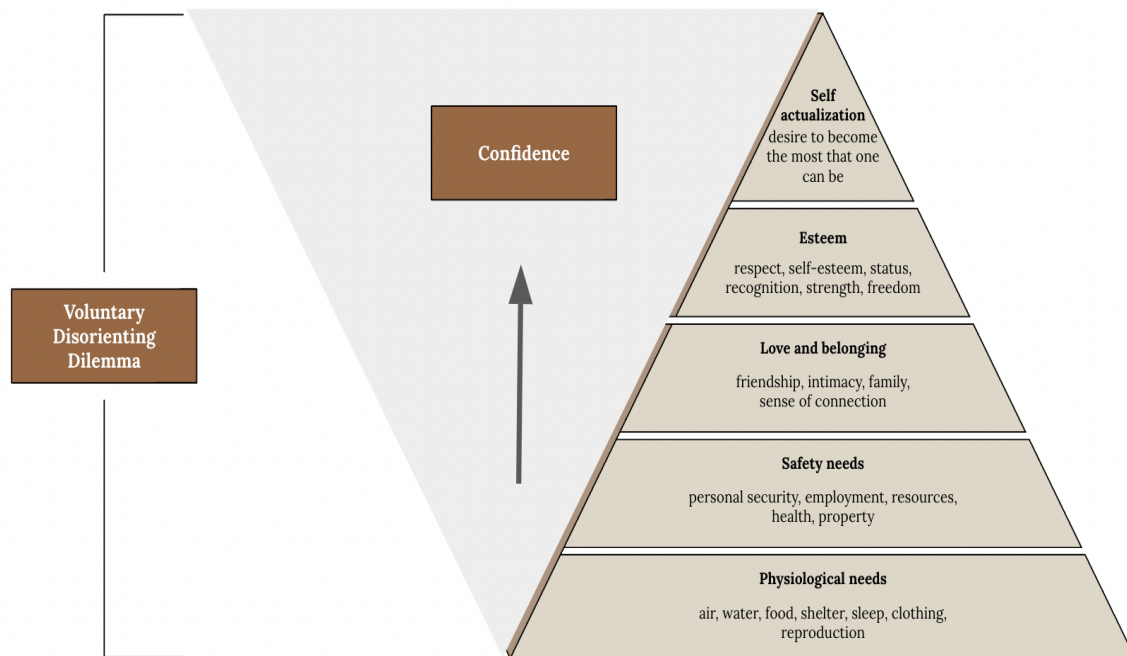
Second, the results of this study support the finding that hesitancy is experienced followed by confidence when undergoing a voluntary disorienting dilemma, precisely following Maslow's hierarchy of needs. Though voluntary and at the free will of the participant, a human will not feel immediately or be easily compelled to risk losing one or more of the three first needs: physiological, safety, and love and belonging. Hence, a human feels hesitant to move forward. In completing a voluntary disorienting dilemma, however, participants in this study experienced confidence, having not lost the first three needs and instead expanding to the fourth and fifth final needs of esteem and self-actualization. Freedom, empowerment, strength, confidence, and pride were a few words participants used, as discussed in Chapter 4, and are directly related to the fourth and fifth pillars of Maslow's pyramid.

Lastly, and most importantly, Maslow's hierarchy of needs supports the third and major finding of this study: 93% of subjects would repeat their voluntary disorienting dilemmas again. Participants not only kept the first three stages of needs, though a voluntary disorienting dilemma put those needs into question, but also gained the fourth and fifth stages of needs. In conclusion, voluntary disorienting dilemmas and their repetition aid humans in achieving their highest needs as articulated by Maslow.

Considering these reasons, additions to Maslow's hierarchy of needs have been met with controversy among academics and others. In recent studies, Henwood et al. (2015) and Ghatak and Singh (2019) questioned the cultural sensitivity and lived experiences of other populations when Maslow's hierarchy of needs is expanded or altered. For this study, the researcher suggests that confidence may result as an individual progresses up the hierarchy of needs.

Figure 14

Maslow's Hierarchy of Needs Integrated With Voluntary Disorienting Dilemmas

Comparison With Mezirow's Theory

The results of this study not only support but also contradict Mezirow's theory of transformational learning. Mezirow (1978a) initially outlined a linear and long process for transformational learning to occur, which included the following 10 steps:

1. A disorienting dilemma;

2. Self-examination;

3. A critical assessment of personally internalized role assumptions and a sense of alienation from traditional social expectations;

4. Relating one's discontent to similar experiences of others or to public issues—recognizing that one's problem is shared and not exclusively a private matter;

5. Exploring options for new ways of acting;

6. Building competence and self-confidence in new roles;

7. Planning a course of action;

8. Acquiring knowledge and skills for implementing one's plans;

9. Provisional efforts to try new roles and to assess feedback; and

10. A reintegration into society on the basis of conditions dictated by the new perspective. (p.7)

The results of this study suggest that transformational learning is not at all linear. Although a situation (the disorienting dilemma) must first occur, participants in this study explored options for acting before self-examining, planned a course of action before considering their role assumptions, and often did not express feeling their situations were similar or related to what others have experienced. Although this study was only focused on the first step of transformational learning, the disorienting dilemma, the rich conversations from the 70 participants lacked discussions, spilled over into various steps of transformational learning, and illustrated this nonlinear finding.

In addition and in support of the argument against Mezirow's theory of transformational learning, this study did not reveal any descriptions related to the later stages outlined by Mezirow. The participants did not allude to "trying out" a new role (Step 9) as a means to assess how others would react to new behavior or gaining new knowledge or skills (Step 8) before

acting. This study focused explicitly on the first step of transformational learning, its benefits, and meanings, and perhaps did not permit participants to elaborate on their entire voluntary disorienting dilemmas, which may have included these additional steps of their transformational learning. Further, participants did not directly state "learning" as a benefit of completing voluntary disorienting dilemmas, but much of Mezirow's work also does not contain explicit declarations of "learning" or even "transformation."

In contrast, the results of this study aligned with several of Mezirow's assertions. As Mezirow detailed, most transformational learning is an inward experience. He described two forms of the disorienting dilemma, as mentioned in Chapter 1: "Two types [of dilemma] can be distinguished. One is an external event—the death of a husband, divorce, loss of a job, moving to a new city. The other is an internal, subjective experience—the feeling that life is not fulfilling, a sense of deprivation, the conviction that being only a housewife forecloses access to other rewarding experiences," (Mezirow, 1978a, p. 13). Many participants of this study were facing struggles only known and subjectively determined by them such as decisions to confront individuals, feeling unsure of a move across the country, and perceiving the condemnation of a group.

Another clear area of this study's results that are in agreement with Mezirow's (1978a) findings relates to the identity impasse and crowd condemnation. Transformational learning is "becoming aware of one's own tacit assumptions and expectations and those of others and assessing their relevance for making an interpretation" (Mezirow, 1978a, p. 12). This definition relates to knowing where one's values and beliefs are and considering the values and beliefs of others. Mezirow's further comments related to adjusting and critically assessing one's identity and beliefs are also well documented and in line with the findings of the current study: "Life

becomes untenable, and we undergo significant phases of reassessment and growth in which familiar assumptions are challenged and new directions and commitments are chartered" (Maslow, 1978a, p. 101). . Mezirow also explained, in the context of his initial research pertaining to women going back to college: "(they) may be responding to changing social norms that require them to define their situation in this way and to explore other options actively. The women responding to an external dilemma, on the other hand, are likely to come into the program more traumatized and in a stage of panic about the urgent need to change" (Maslow, 1978a, p. 14). Mezirow noted that disorienting dilemmas "can dissociate one from long-established modes of living and bring into sharp focus questions of identity, of the meaning and direction of one's life" (p. 12).

Recommendations for Future Research

The fields of sociology, change management, and global leadership could greatly benefit from further research pertaining to the voluntary disorienting dilemma and the findings of this study. First, the findings of hesitancy and confidence, along with the repeat rate for voluntary disorienting dilemmas of 93%, should be tested in other geographies, cultures, religions, and age groups. Further, the exploration of voluntary disorienting dilemmas should be expanded to a greater number of people to assess whether hesitancy and confidence are experienced among tens of thousands of people to test this study's results validity. The research pertaining to voluntary disorienting dilemmas should also be expanded beyond classroom and academic settings as called upon by Taylor (2007) and several other researchers of transformational learning. The theory's positioning only within adult learning limited much of Ensign's research and the transformational learning academic community for nearly 40 years. As the results of this

study indicated, the voluntary disorienting dilemma and its implications can be explored in many fields beyond that of adult learning.

In sociology, the "reward" of confidence in pursuing voluntary disorienting dilemmas may have benefits in therapeutic procedures in depression (Tryon & Misurell, 2008) and addiction (Simmons et al., 2013). As Harmon-Jones (2020) and colleagues observed, pushing through cognitive dissonance (a form of internal hesitancy as first introduced by Festinger in the 1957) has positive associations within the brain. Cooper (2019) stated that emerging research shows the power of dissonance, which propels thoughts and behaviors, and as the Identity Impasse shows, pushing through a voluntary disorienting dilemma can allow subjects to uncover their true selves, building their confidence.

Similar to the field of sociology, change management scholars can apply and test the current study's findings in corporate environments and organizational settings. Lewin's change theory, Senge's fifth discipline model, and Kotter's eight-step change model, which described change as unsettling and uncertain, could be expanded to assess whether employees would undergo the change again and whether confidence is a byproduct of the change (as this study showed after completing a voluntary disorienting dilemma). In Lewin's three-step change model, the first phase of "unfreeze" is marked by chaos, frustration, and confusion, much like a disorienting dilemma (Schein, 1996). An organization then "freezes" back into place but with its new form. Given the likelihood of participants in this study to repeat their disorienting dilemmas and consider new ones, Lewin's model could be expanded to consider how frequent or easily organizations can freeze. Perhaps organizations do not have to ever freeze and can remain fluid permanently.

In Kotter's change model, managing and planning change within an organization is often foolishly overlooked (Mohiuddin & Mohteshamuddin, 2020). One recent study revealed that more than 50% of organizations waste money, squander employee time, and never witness sustained change when they fail to establish a change management plan (Mohiuddin & Mohteshamuddin, 2020). Some researchers have asserted that failure to implement change well leads to productivity declines, a lack of attention toward the quality of work, and employee turnover (Sittrop & Crosthwaite, 2021). This chain of failed change can further infect an organization's customers, employee morale, and employee mental health (Sittrop & Crosthwaite, 2021). Thus, planning and managing change is paramount for an organization if it is undergoing a transformation and seeks to thrive after its change. Given the voluntary nature of disorienting dilemmas that are chosen, perhaps far more research could be conducted to examine the results of permanent change when planning is thoroughly considered. Such research could yield fascinating results in change management and indicate whether change in an organization could be positioned or done as voluntary and self-selected by employees. Perhaps these results would yield a change in employees that could help them fulfill a higher need, per Maslow's hierarchy of needs and as discussed in this chapter. The ramifications of achieving higher needs within an organization could be tied to employees' tenure or even the longevity of an organization.

Finally, the field of global leadership currently could benefit and expand based on the findings of this study. Following the disintegration of America's unipolar position in the early aughts, "the world now stands at a critical juncture," (Kegley & Raymond, 2021, p. 139). The Trump administration further agitated the post-Cold War "rules-based, international democratic order," straining any form of cooperation among China, Russia, and the United States since 2017 (Kegley & Raymond, 2021, p. 139). Several "triggering events," a form of disorienting

dilemmas, are occurring such that a "return to normalcy" seems out of reach (Bandara et al., 2022). Perhaps the Identity Impasse, the Free Fall, and Crowd Condemnation could be applied as a lens through which geopolitical strategies could be examined. Much has been questioned about America's identity in its post unipolar era (Devos & Mohamed, 2014). The "Free Fall" described in this study is potentially correlated to Tolerance for Ambiguity Scale (Herman et al., 2010).

In summary, the bounds of this study's results are vast. In addition to scholars within transformational learning theory, researchers in the areas of sociology, change management, and global leadership could apply and explore the findings of how hesitancy and confidence emerge from a voluntary disorienting dilemma. Further exploration of their impact on the realms of research is feasible.

Researcher's Reflections

I have been interviewing people for a long time on TV, for podcasts, on panels, for employment, and so forth. This research greatly expanded my love for going deep with another person in a one-on-one setting. What struck me most about the participants was their abilities to explore their voluntary disorienting dilemmas via Zoom without a direct or personal connection to me other than a few email exchanges. The participants often said, "Wow. I've never told anyone about this," or "You're not going to tell anyone this was me, right?" There is a lot of trust and honor in being a researcher, far more than I would have guessed from my other interviewing experiences.

I also found the joy in the "ah ha" moment in research, a rush in believing I connected the dots in a way no one else has done before. When I was deep into coding, reading my interview memos and every single full transcript, I thought about Maslow's pyramid and how my findings could possibly fit into it. That was a joyous moment in realizing, "Wait. This is what this study is

actually about." I hope future researchers, perhaps reading this section right now as they embark on their dissertation, will have a similar moment.

Opposite of what I could call "joy" is the absolute disorientation in completing this dissertation at various times. As Mezirow (1978a) mentioned, "these disorienting dilemmas of adulthood can dissociate one from long-established modes of living and bring into sharp focus questions of identity, of the meaning and direction of one's life" (p. 12). In undertaking this process, I realized that I am not destined for a life in academia, but I also did not assume that this realization emerged after I embarked on this PhD program and this dissertation. Sometimes, as many participants in my study also found, one encounters the Identity Impasse, where one does not question what currently is the identity of oneself but what could or could not be the identity of oneself in the years to come. There is a deep value in that process.

Lastly, as the participants' described repeatedly, the benefit of confidence is irresistible. In a way, this research was a meta experience in that I was studying participants' voluntary disorienting dilemmas while experiencing my own in completing this tome of a dissertation. Despite the further compounding disorientation this created, I noticed, like most of the participants in this study, that I would emphatically do it all over again. This is the power of confidence and reason to actively pursue voluntary disorienting dilemmas.

Chapter Summary

Ultimately, transformational learning is about change that is everlasting, imprinted on a person in such a way that it is carried well beyond a classroom, whether an academic kind or simply in the school of life. This study and Chapter 5 showed that the main benefit of voluntary disorienting dilemmas is confidence, which, for this study, emerged from experiences that helped subjects illuminate their identities, locate the ground, and clear away the threat or fear of

condemnation. The meaning of voluntary disorienting dilemmas is hesitancy, expressed in the Identity Impasse, the Free Fall, and Crowd Condemnation that subjects felt throughout their voluntary disorienting dilemmas. Finally, this qualitative research study showed that 93% of subjects would repeat their voluntary disorienting dilemmas because of the main benefit of confidence. Although some findings of this study support Mezirow's theory of transformational learning, comparing and expanding Maslow's hierarchy of needs, a conceptual framework in the realm of motivation theory, to the findings of this study revealed a far more compelling alignment. The impact of this study's findings in sociology, change management, and global leadership should be further explored and are initially compelling as this body of research contributes to voluntary disorienting dilemmas and the merits of transformational learning theory.

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APPENDIX A

Adult Participant Informed Consent Form

Informed Consent Form
IRB #: 22-12-2037
Participant Study Title: voluntary discomfort
Formal Study Title: THE BENEFITS OF VOLUNTARY DISORIENTING DILEMMAS FOR A TRANSFORMATIONAL LIFE: A GROUNDED THEORY STUDY IN TRANSFORMATIONAL LEARNING
Authorized Study Personnel:
Principal Investigator: Rebecca Bamberger, MBA Office: 619-917-5109
Key Information: This qualitative study seeks to understand why people choose experiences they know to be uncomfortable. In addition to understanding why people may deliberately choose an uncomfortable experience, this study will answer if participants would chose the uncomfortable experience again, what benefits they derived from the experience, and what prompted the action to undergo an uncomfortable experience.

If you agree to participate in this study, the project will involve:
> Males and Females between the ages of 18 and 65
> Procedures will include interviews
> 1 interview is required
> These visits will take a maximum of 60 minutes
> There are no to minimal risks associated with this study
> You will be paid $0 for your participation
> You will be provided a copy of this consent form

Invitation
You are invited to take part in this research study. The information in this form is meant to help you decide whether or not to participate. If you have any questions, please ask.
Why are you being asked to be in this research study?
You are being asked to be in this study because you have experienced an event that you pursued despite it being uncomfortable for you to do so.
What is the reason for doing this research study?
Being uncomfortable by choice as a means of personal growth has been touted for hundreds of years. The practice of being uncomfortable by choice continues to expand beyond centuries of philosophical, religious, and military doctrines. For the last 40 years, academics have classified purposely being uncomfortable or voluntary discomfort within transformational learning theory, though little research has been conducted to understand the exact benefits of pursuing an uncomfortable experience.

What will be done during this research study?
You will be asked to participate in an up to 60 minute Zoom interview which will prompt you to recall an experience you chose to do that you considered to be uncomfortable. Initial questions will be sent to you at least 48 hours in advance and will build according to the answers you provide.

How will my answers to the interviews be used?
The principal investigator, Rebecca Bamberger, will build a theory related to transformational learning theory based on your and other participants' answers.

What are the possible risks of being in this research study?
This research presents risk of loss of confidentiality, emotional and/or psychological distress because the interviews involve sensitive questions about your personal experiences.

What are the possible benefits to you?
You are not expected to get any benefit from being in this study.

What are the possible benefits to other people?
The benefits to science and/or society may include better understanding of why people choose to do uncomfortable experiences.

What will being in this research study cost you?
There is no cost to you for being a participant in this research study.

Will you be compensated for being in this research study?
No. There is no payment offered to participants.

What should you do if you have a problem during this research study?
Your welfare is the major concern of every member of the research team. If you have a problem as a direct result of being in this study, you should immediately contact one of the people listed at the beginning of this consent form.

How will information about you be protected?
Reasonable steps will be taken to protect your privacy and the confidentiality of your study data. The data will be stored electronically through a secure server and will only be seen by the research team during the study and for five years after the study is complete. The only persons who will have access to your research records are the study personnel, the Institutional Review Board (IRB) of Pepperdine University, and any other person, agency, or sponsor as required by law. The information from this study may be published in scientific journals or presented at scientific meetings but the data will be reported as group or summarized data and your identity will be kept strictly confidential.

What are your rights as a research subject?
You may ask any questions concerning this research and have those questions answered before agreeing to participate in or during the study. For study related questions, please contact the investigator(s) listed at the beginning of this form. For questions concerning your rights or complaints about the research contact the Institutional Review Board (IRB):

Phone: 1(310)568-2305
  Email: gpsirb@pepperdine.edu

What will happen if you decide not to be in this research study or decide to stop participating once you start?
You can decide not to be in this research study, or you can stop being in this research study ("withdraw') at any time before, during, or after the research begins for any reason. Deciding not to be in this research study or deciding to withdraw will not affect your relationship with the investigator or with Pepperdine University.

You will not lose any benefits to which you are entitled.
Documentation of informed consent
You are voluntarily making a decision whether or not to be in this research study. Signing this form means that (1) you have read and understood this consent form, (2) you have had the consent form explained to you, (3) you have had your questions answered and (4) you have decided to be in the research study. You will be given a copy of this consent form to keep.

Participant Name:

_____

Name of Participant: Please Print

Participant Signature:

_____

Signature of Research Participant   Date

Investigator certification:
My signature certifies that all elements of informed consent described on this consent form have been explained fully to the subject. In my judgment, the participant possesses the capacity to give informed consent to participate in this research and is voluntarily and knowingly giving informed consent to participate.

_____

Signature of Person Obtaining Consent   Date

APPENDIX B

IRB Approval Letter

Pepperdine University
24255 Pacific Coast Highway
Malibu, CA 90263
TEL: 310-506-4000

NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: March 27, 2023

Protocol Investigator Name: Rebecca Bamberger

Protocol #: 22-12-2037

Project Title: THE BENEFITS OF VOLUNTARY DISORIENTING DILEMMAS FOR A TRANSFORMATIONAL LIFE: A GROUNDED THEORY STUDY IN TRANSFORMATIONAL LEARNING

School: Graduate School of Education and Psychology

Dear Rebecca Bamberger:

Thank you for submitting your application for expedited review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. As the nature of the research met the requirements for expedited review under provision Title 45 CFR 46.110 of the federal Protection of Human Subjects Act, the IRB conducted a formal, but expedited, review of your application materials.

Based upon review, your IRB application has been approved. The IRB approval begins today March 27, 2023, and expires on March 26, 2024.

The consent form included in this protocol is considered final and has been approved by the IRB. You can only use copies of the consent that have been approved by the IRB to obtain consent from your participants.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Please be aware that changes to your protocol may prevent the research from qualifying for expedited review and will require a submission of a new IRB application or other materials to the IRB. If contact with subjects will extend beyond March 26, 2024, a continuing review must be submitted at least one month prior to the expiration date of study approval to avoid a lapse in approval.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at community.pepperdine.edu/irb.

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

Sincerely,

Judy Ho, Ph.D., IRB Chair

cc: Mrs. Katy Carr, Assistant Provost for Research

APPENDIX C

CITI Program Course Certificate

Completion Date 11-Sep-2020
Expiration Date 11-Sep-2023
Record ID   38396789

This is to certify that:

Rebecca Bamberger

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

Graduate & Professional Schools HSR
(Curriculum Group)
Graduate & Professional Schools - Business, Law and Public Policy Students Human Subjects Training
(Course Learner Group)
1 - Basic Course
(Stage)

Under requirements set by:

Pepperdine University

Collaborative Institutional Training Initiative

Verify at www.citiprogram.org/verify/?w56a9da99-2f95-48bd-8549-4aca0ceeb6aa-38396789