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A PHENOMENOLOGICAL CASE STUDY OF TRANSFORMATIVE LEARNING IN A NON- TRADITIONAL DIVERSITY TRAINING PROGRAM

Ame Lambert
University of Texas at Tyler

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A PHENOMENOLOGICAL CASE STUDY OF TRANSFORMATIVE LEARNING IN A
NON-TRADITIONAL DIVERSITY TRAINING PROGRAM

by

AME LAMBERT-AIKHIONBARE

A dissertation proposal submitted in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy
Department of Human Resource Development

Andrea D. Ellinger, Ph.D., Committee Chair

College of Business and Technology

The University of Texas at Tyler
May 2017


The University of Texas at Tyler
Tyler, Texas

This is to certify that the Doctoral Dissertation Proposal of

AME LAMBERT-AIKHIONBARE

has been approved for the dissertation requirement on
May 17, 2017
for the Doctor of Philosophy degree

Approvals:



Dissertation Chair: Andrea D. Ellinger, Ph.D.


Member: Rochell McWhorter, Ph.D.


Member: Placida Gallegos, Ph.D.


Member: Jerry W. Gilley, Ed.D.


Chair, Department of Human Resource Development


Dean, College of Business and Technology

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I am a person of faith and I am grateful to God for the help and support. I imagined going to school full-time and immersing myself fully in the process. Life had other ideas. Trying to do this with an ever increasing to do list was a real challenge. Thank God for grace.

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Abstract

A PHENOMENOLOGICAL CASE STUDY OF TRANSFORMATIVE LEARNING IN A NON-TRADITIONAL DIVERSITY TRAINING PROGRAM

Ame Lambert

Dissertation Chair: Andrea D. Ellinger, Ph.D.

The University of Texas at Tyler
May 2017

Rapidly changing demographics and globalization has spurred a plurality of organizations to invest millions of dollars annually in diversity training, with the primary aim of improving the experiences of underrepresented employees. However, the results of diversity training to date have not proven encouraging. Positive outcomes of diversity training have generally been confined to increased awareness and improved attitudes towards diversity, with implicit and explicit prejudice and behavior remaining unchanged. The aim of this study was to understand the transformational learning experiences of participants in a non-traditional diversity training program and the impact of their transformational learning on their behavior.

A phenomenological embedded case study design was employed. Data was collected through semi structured qualitative interviews. A pilot study of two participants was conducted to preview the interview protocol and strengthen the main study design. The main study was conducted with eight participants and also included the two pilot interviews for a total of 10 participants. Interpretative phenomenological analysis (IPA) was used to analyze the data from all ten participants. Results revealed the value of incorporating an interdisciplinary approach and transformative learning design in diversity training in order to impact affective and behavioral outcomes.

Findings from the study provided practical implications for diversity and inclusion in HRD and for higher education practitioners, managers, and leaders as they seek to engage and empower a workforce that is global,

multicultural, and interdependent. Contributions and implications for theory and future research, drawn from the findings of the study, are discussed.

Chapter 1

Introduction

Background to the Problem

A diverse and global workforce and customer base are the reality of most organizations today. According to the Bureau of Labor Statistics (U.S. Department of Labor, 2017), in 2016, the United States (U.S.) workforce was 47% female (52% of management and professional occupations) and 53% male. Seventy-eight percent of these individuals were White, 16.8% were Hispanic/Latino, 12% were African American, and 6% were Asian. American Indians and Pacific Islanders each comprised 1% of the workforce, while multiracial individuals comprised 2% of the workforce. Additionally, 16.9% of the workforce was foreign-born, with Hispanics comprising 48.3% of this foreign-born population, Asians comprising 25%, Whites comprising 16.2%, and Blacks comprising 9.3%. These statistics have prompted inclusion efforts in organizations within and outside the U.S. (Anand & Winters, 2008; Boehm et al., 2014; Fujimoto & Härtel, 2017; McGuire & Bagher, 2010; Theodorakopoulos & Budwhar, 2015).

Diversity refers to the differences, similarities, and related tensions that can exist among the elements of a mixture (R. R. Thomas, 2004, p. 3). *Inclusion* refers to the intentional engagement with diversity to create positive outcomes (Dobusch, 2014). In the United States, inclusion efforts are currently framed as the business case for diversity (Bendick, Egan, & Lanier, 2010; Dreachslin, 2007; D. A. Thomas & Ely, 1996). The business case for diversity encompasses the ideas that diversity enhances the bottom line, organizations should reflect their customer base, and diversity should be managed and leveraged to create a positive impact on the organization (Kalinowski et al., 2012; D. A. Thomas & Ely, 1996; R. R. Thomas, 1990, J. C. Williams, 2014; Knights & Omanović, 2016).

The current iteration of diversity and inclusion efforts in organizations today was galvanized by the paradigm-jolting content of a seminal 1987 workforce report and the work of practitioners and scholars at that time

(Anand & Winters, 2008; McGuire & Bagher, 2010). The Hudson Institute's *Workforce 2000* report (Johnston, 1987) predicted that in the new millennium, only 15% of new workforce entrants would be White men. The report created an organizational storm, shifting diversity conversations from a focus on post-civil rights affirmative action and compliance to a focus on maximizing the benefits of diversity and challenging organizations to take a more proactive stance with their diversity efforts (Anand & Winters, 2008; Cox & Blake, 1991; D. A. Thomas & Ely, 1996; R. R. Thomas, 1990). However, three decades after the report, controversy about diversity and inclusion and challenges such as the absence of women and people of color in the STEM fields persist (Bock, 2014). Regardless of the demographic changes in wider society and the efforts galvanized by the report, *Workforce 2000* has not had a sustained, transformative impact on industry.

According to Strachan, French, and Burgess (2010), two other very influential publications further articulated the message of proactive diversity and inclusion efforts as the effective choices for organizations. Roosevelt Thomas, Jr.'s popular 1990 *Harvard Business Review* article demanded that affirmative action approaches must be expanded to create true equity. R. R. Thomas (1993) is also credited with originating the term *managing diversity*, which is the process of creating and maintaining an environment that naturally enables all participants to contribute to their full potential in focused pursuit of organizational objectives (p. 316). R. R. Thomas furthermore advanced the notion of broadening diversity and inclusion efforts beyond race and gender to focus on the variety of individual and group differences in the workplace (Kulik & Roberson, 2008). R. R. Thomas (1991) believed doing so was the only path to true equity. Cox and Blake (1991) also acknowledged the benefits of the multicultural organization and encouraged and urged organizations to do the work required to harness the power of difference. Strachan et al. (2010) also credited the widely cited D. A. Thomas and Ely (1996) *Harvard Business Review* report, in which the authors provided an organizational effectiveness argument that diversity management efforts exert a major impact on diversity and inclusion efforts in organizations. These arguments captured the psyche of organizations in the United States and has since spread beyond U.S. shores. D. A. Thomas and Ely (1996) also originated the learning and

effectiveness paradigm for managing diversity. These arguments that diversity makes organizations better have endured in spite of sometimes insufficient and contradictory evidence about the impact of diversity (Curtis & Dreachslin, 2008; Fujimoto & Hartel, 2017).

The ambiguity of the impact of diversity is clear from the available evidence. Diversity can be good, bad, or neutral, depending on a host of contextual factors and interventions (Curtis & Dreachslin, 2008; Jehn & Bezrukova, 2004; K. Y. Williams & O'Reilly, 1998). Researchers proposed two paradigms to explain the differences in the impact of diversity (van Knippenberg, De Dreu, & Homan, 2004; K. Y. Williams & O'Reilly, 1998). The social categorization paradigm stated that diversity, most often demographic diversity, leads to in-group and out-group distinctions, which have a negative impact on group cohesion and performance (Kalinowski et al., 2012; Kowan & Paradies, 2013; van Knippenberg et al., 2004; van Knippenberg & Schippers, 2007; K. Y. Williams & O'Reilly, 1998). The information processing paradigm posited that diversity, with the focus often on functional skills and other job-related diversity, boosts innovation and creativity, thereby leading to improved job performance (Kalinowski et al., 2012; van Knippenberg et al., 2004; van Knippenberg & Schippers, 2007; K. Y. Williams & O'Reilly, 1998). Research results, however, have not consistently verified these paradigms, and some research has shown that demographic diversity boosts productivity, while functional diversity does not (Kalinowski et al., 2012; van Knippenberg et al., 2004; van Knippenberg & Schippers, 2007). Other researchers offered the idea that diversity is multifaceted. For example, Harrison and Klein (2007) explored the idea that diversity shows up in three forms: as separation, variety, and disparity, and each form of diversity has a different impact, namely in-group/out-group dynamics, innovation and learning, and status and power differences, respectively.

With all of the inconsistency and contradictions in the research, one undisputed fact remains: Reaping the benefits from diversity is not automatic, and the presence of diversity does not automatically mean that benefits will be realized (Bezrukova, Spell, Perry, & Jehn, 2016; Jayne & Dipboye, 2004). With diversity as a current organizational reality, the advice of Johnston (1987), Cox and Blake (1991), and R. R. Thomas (1992) to proactively

manage diversity in order to reap the possible benefits that can accrue from such diversity (McKay, Avery, & Morris, 2008) remains incredibly relevant.

In addition to the aforementioned demographic shifts in the United States, the shrinking borders of the world of business have made the need for employees and managers skilled in working across distance a priority, leading to an increase in demands for intercultural competence among graduate students entering the workforce (Association to Advance Collegiate Schools of Business [AACSB], 2017; Aranda, Whyne, & Milano, 2012; Glisczinski, 2007; King, Gulick, & Avery, 2010; Kulik & Roberson, 2008). In response to this need, accrediting bodies such as the AACSB, the National Council for the Accreditation of Teacher Education (NCATE), the Council for Accreditation of Counseling and Related Education Programs (CACREP), and the American Psychological Association (APA) as well as higher educational advocacy institutions like the American Council of Education and the American Association of Colleges and Universities have advocated for more diversity education as part of major and general educational requirements (Kulik & Roberson, 2008; Siegel, Abushanab, & Holliday, 2010), ensuring that higher education includes diversity, global citizenship, intercultural competence, and critical thinking as strategic initiatives.

Statement of the Problem

Johnson-Bailey (2012) made clear that teaching about diversity requires a different kind of pedagogy and content from normative educational practice, content, and pedagogy. She contended that

There is a growing emphasis on using a globally informed perspective to research, teach, and learn. To that end, a new emphasis is being placed on global and diversity education. The education of this new era moves beyond the canonical and insists on a critique that asks essential questions of the traditional canon: What perspective informs the scholarship and what perspective is omitted? And what happens when the new teaching and learning that seeks to transform meets the old way of understanding, informing, and ordering our world? (Johnson-Bailey, 2012, p. 261)

Faculty and staff in higher education are now being held responsible for implementing new approaches and content. To achieve this goal, they must first develop intercultural competence themselves (Terry, Dukes, Valdez, & Wilson, 2005). The need to teach students diversity competence and to model inclusion in their work with students, faculty, and staff from different backgrounds made employees in higher education important targets for diversity education (Glisczinski, 2007; Johnson-Bailey, 2012; Sue et al., 2007; Terry et al., 2005). Faculty have often felt unprepared to respond to critical diversity incidents in the classroom, to adequately respond to a variety of learning styles, to support a variety of worldviews, or to handle heated discussions based on identity and controversial issues (Ford, 2011; Minikel-Lacocque, 2012; Orelus, 2013; Sue et al., 2007; Tatum, 2017). Additionally, classroom experiences, residential experiences, and co-curricular engagement are factors that affect the learning, retention, and success of students (Keeling, 2006; Tinto, 1987). This situation makes diversity education and training for students, faculty, and staff in higher education as critical a need as it is in corporate organizations, especially with calls to focus on different contexts in diversity research (Kulik, 2014). Scholars often use the terms *diversity education* and *diversity training* interchangeably, but some contended that there are distinctions between the two (King et al., 2010). Diversity education is often provided in educational contexts to increase student awareness, whereas diversity training is often provided to employees of organizations.

Diversity training remains one of the most popular approaches to managing diversity (Bennett, 2010; Bezrukova et al., 2016; Esen, 2005, Kaltenbaugh, Parsons, Brubaker, Bonadio, & Locust, 2017; Nishii, 2017; Q. M. Roberson, 2006; Wentling, 2004), and almost three-quarters of organizations offer diversity training (Kirk & Durant, 2009; L. Roberson, Kulik, & Pepper, 2001). Diversity training is an estimated 200 million dollar a year industry (Chung, Gully, & Lovelace, 2017; Vedantam, 2008, SHRM, 2010), and King, Dawson, Kravitz, and Gulick (2012) described the programs as “educational or developmental initiatives that address issues related to variability in employee social identities” (p. 7). King et al. (2012) further stated that diversity training programs “often represent a central component of broader organizational diversity initiatives” (p. 7). This broad definition of diversity training

covered a variety of programs with different foci, goals, designs, and approaches. The commonality among these programs was their emphasis on working effectively across difference and creating space for non-normative ways of being and doing (Ferdman & Brody, 1996; Lindsey, King, Hebl, & Levine, 2015).

As popular as diversity training is, the research into its effectiveness and impact has not equaled its pervasiveness (Combs & Luthans, 2007; Ehrke, Berthold, & Steffens, 2014; Kulik & Roberson, 2008), especially in higher education, where one study revealed that 81% of surveyed institutions had a diversity training program but none of them had evaluated the effectiveness of the program (McCauley, Wright, & Harris, 2000). Additionally, research results from diversity training have been mixed (Hemphill & Haines, 1997; Kirk & Durant, 2009). Diversity training has primarily focused on awareness, with behavior and skill development getting short shrift (Bezrukova, Jehn, & Spell, 2012; Chrobot-Mason & Quinones, 2002). This outcome is particularly surprising because one of the most often cited reasons for diversity training is to decrease discrimination (Bendick, Egan, & Lofhjelm, 2001; Kulik, 2014; McKay et al., 2008). The research on the impact of diversity training suggested that diversity training increases awareness (Bezrukova et al., 2012; Kulik & Roberson, 2008) and scores high on measures such as reactions (Bell & Kravitz, 2008; Rynes & Rosen, 1995). However, diversity training has generally failed to change behavior (Bell & Kravitz, 2008; Combs & Luthans, 2007) or reduce bias (Kulik & Roberson, 2008; Linnehan, Chrobot-Mason, & Konrad, 2006). Diversity training also has not affected organizational outcomes such as increasing the number of women and people of color in managerial positions (Bezrukova et al., 2016; Kalev, Dobbin, & Kelly, 2006).

Researchers have advocated for moving away from a focus on the main effects of diversity training and other diversity interventions to more complex and nuanced impact and outcomes in order to help produce more consistent and useful research outcomes (Bell & Kravitz, 2008; Bezrukova et al., 2016; Kalinoski et al., 2012; van Knippenberg & Schippers, 2007). In response, diversity training researchers have examined the impact of a variety of factors such as trainee characteristics, motivation, voluntary or involuntary training, trainer characteristics, broad or narrow

diversity foci, framing of training title and content, learning approaches used, length of training, organizational support factors, self-efficacy, and other variables (Holladay, Knight, Paige, & Quiñones, 2003; Holladay & Quinones, 2008; Kulik, Pepper, Roberson, & Parker, 2007; L. Roberson et al., 2001; Wiethoff, 2004). This research yielded valuable but incomplete insights (Bezrukova et al., 2012, 2016). Thus, Bell and Kravitz (2008) indicated that with regard to diversity training, the question remains, “What works and why?”

If behavioral outcomes, particularly a decrease in discriminatory behavior, are a primary goal of diversity training (Bendick et al., 2001; King et al., 2010), then the role of mental models in this process should be considered because mental models impact individuals’ behavior (Rook, 2013). Senge (2006) described mental models as the entrenched assumptions that shape individuals’ understanding of the world, and as such, influence their actions. Mental models have been shown to affect behavior and performance (Knight et al., 1999). As deeply embedded representations of a person’s reality, mental models are not easily changed, and new information is often subsumed into existing mental models (H. H. Johnson, 2008). Research on prejudice also made clear that a difference exists between explicit prejudice and implicit prejudice or association (Greenwald & Banaji, 1995; Greenwald, McGhee, & Schwartz, 1998; Sritharan & Gawronski, 2010), and implicit prejudice is more deeply embedded and harder to change. Interculturalists, anthropologists, and sociologists termed this paradigm of superiority against other cultural groups’ *ethnocentrism* (Andersen & Taylor, 2007). The need to access implicit prejudice and change ethnocentric mental models, with the ultimate goal of changing behavior, requires alternatives to informational and additive learning within diversity education and training (Bezrukova et al., 2012; Kulik & Roberson, 2008; Sritharan & Gawronski, 2010).

Franz (2003) described learning as a phenomenon about change. Change is transformative when individuals, groups, and organizations arrive at new perspectives and actions that greatly differ from their past views and behaviors (Mezirow, 1997, 2006). This kind of learning is known as *transformative learning*, and Mezirow (1997, 2006) described it as a process that leads to a change in one’s frames of reference. Akin to mental models, frames of

reference are embedded structures of beliefs and assumptions that serve as the lens for interpreting experience (Mezirow, 1997, 2006). A transformed or changed frame of reference represents a change in meaning structures (Mezirow, 1981). This is the kind of change that leads to a change in behavior and the kind of change sought by diversity training programs (Taylor, 1994). With regard to transformative learning in higher education, Glisczinski (2007) stated,

Higher education has the potential to sow the seeds of conscientization, understanding, insight, and transformation by fostering proactive thinking, incorporating multiple perspectives, and encouraging dialogue and construction of knowledge (Daloz, 1990). Learning of this nature has the potential to transform worldview and behavior. Transformative learning may produce significant, far-reaching, and drastic changes in the learner (Perry, 2000). Belenky and Stanton (2000) emphasized that “not only would participation and reflective dialogue support [students’] development as individuals, it could also support the development of a more inclusive, just, and democratic society” (p. 74). (p. 219)

Other scholars and practitioners agreed with Glisczinski’s (2007) emphasis on the need for transformation to create inclusive societies. Henderson (2002) regarded diversity and inclusion as an effort that requires both transformative learning on the individual level and transformational change on the organizational level. Intercultural development is a transformative learning process (Taylor, 1994), and Mezirow (2000), a proponent of diversity and inclusion, presented ethnocentrism as a habit of mind that should be transformed. Scholars suggested the incorporation of multidisciplinary thinking and approaches to foster this desired transformation for inclusion. For example, Pendry, Driscoll, and Field (2007) encouraged diversity trainers to incorporate research and insights from the field of social psychology, focusing on prejudice reduction and intergroup contact in their work. Calls for human resource development (HRD) practitioners to incorporate learning from neuroscience into their efforts to create inclusion and maximize performance have increased (Rook, 2013). Intercultural scholars and practitioners also encouraged diversity trainers to incorporate cultural elements into their efforts (J. M. Bennett & Bennett, 2004;

Fowler, 2006), and human resource (HR) and HRD scholars encouraged diversity trainers to incorporate the best of diversity education and transformative learning efforts (Hite & McDonald, 2010; H. H. Johnson, 2008; Kulik & Roberson, 2008).

Signs indicate that scholars and practitioners are heeding such calls. For example, Jackson (2015) employed a multi-disciplinary approach when she designed an intercultural transitions course to enhance the impact of study abroad experiences on student returnees. Her design was informed by the developmental model of intercultural sensitivity, transformative learning theory, Allport's (1954) contact hypothesis, and Kolb's (1983) experiential learning. At the end of the course, students showed a modest increase in intercultural development, as measured by pre- and posttest scores on the Intercultural Development Inventory. They also showed increased self- and other awareness and were significantly less likely to revert back to less sophisticated intercultural thinking and behavior in times of stress.

However, this same level of intentional, multi-disciplinary design has not been documented in the diversity education and training literature in intervention efforts with adults in the workplace, particularly those in higher education settings that will ultimately serve as the role models for students who must effectively work in global and multicultural contexts. Therefore, this research study sought to contribute to the literature on diversity and inclusion, diversity education and training, transformative learning, and mental models by seeking to understand the process of transformation that occurred in a particular context that incorporated diversity training and education components and was guided by transformative learning and intercultural development theories.

Purpose of the Study

The purpose of this study was to understand the transformational learning experiences that may have occurred in a non-traditional diversity training program, along with potential antecedents, outcomes, and program design considerations.

Theoretical/Conceptual Underpinnings of the Study

Transformative learning theory (TLT) in the field of adult education and the developmental model of intercultural sensitivity (DMIS) in the field of intercultural communication underpinned and guided this study. Transformative learning theory was developed by Mezirow (1991). In the social constructivist tradition, Mezirow's work was deeply influenced by Paulo Freire, a Brazilian adult educator who conceived of education as an emancipatory process (Freire, 1970/1990; Henderson, 2002). Mezirow's work focused on meaning, that is, the way individuals make sense of and understand their experiences and the process by which these meaning schemes and perspectives develop and change. Transformative learning, therefore, refers to a change in a frame of reference or a meaning scheme (Mezirow, 1997, 2006). Mezirow (1995) suggested that perspective transformation is an infrequent process that usually occurs as a result of a disorienting dilemma, a major triggering event that challenges what a person knows to be true. Mezirow distinguished among instrumental learning, which is learning to solve a problem; communicative learning, which is learning to understand another person's point of view; and transformative learning, which Mezirow (2000) described as

The process by which we transform our taken-for-granted frames of reference [meaning perspectives, habits of mind, mind-sets] to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true to guide action. (p. 7)

Critical reflection serves as an important part of the aforementioned perspective transformation process. As individuals hold their structures of assumptions and expectations (which serve as a lens or filter through which they experience and make sense of the world, and by extension respond to it) up for deeper inspection, they might find that some of their assumptions are untested and that they hold unexamined beliefs learned through socialization and cultural assimilation. As adults, these "truths" might no longer work in their current context and/or their current state of development. Educators can also create safe spaces for participants to critically examine the assumptions that underlie their beliefs and actions.

The developmental model of intercultural sensitivity. The developmental model of sensitivity is a stage model of cognitive development that measures an individual's orientation to difference. According to M. J. Bennett (1986, 1993), people react in predictable ways as their experience with and of cultural differences becomes more sophisticated. The model has six stages of development: denial, defense, minimization, acceptance, adaptation, and integration, which describe the processes and content by which individuals advance along the continuum (see Table 1).

Research Questions

The following questions guided this study:

1. What was the experience of transformational learning for participants in the Non-traditional Diversity Training Program?
2. What influenced participants' transformational learning experiences?
3. How did participants' transformational learning experiences impact their behavior?
4. What aspects of the program contributed to participants' transformational learning?

Summary of the Pilot Interviews and Influence on Main Study Design

A pilot study consisting of two qualitative interviews was conducted during the Fall, 2015 academic term. The purpose of the pilot was to ensure that the process of identifying and selecting potential participants yielded participants who could provide rich descriptions of their experiences in the non-traditional hybrid diversity training program being examined in this dissertation research, as well as allow for the exploration of critical factors that impacted these experiences. Additionally, the interview protocol developed for the main study was implemented to determine if the questions were clear and appropriate for the purposes of the study and to determine if the data analysis approach was feasible. The pilot interviews also offered the researcher an opportunity to further enhance her interviewing skills.

Table 1. Stages of the Developmental Model of Cultural Sensitivity

Stage of Development	Description
Denial	A person in denial only has a very vague concept of other cultures. There might be a general disinterest in, or avoidance of, the “other” and very broad descriptive categories, such as “foreigner.”
Defense	People at defense experience polarization, an “us” and “them” orientation, where “us” is much better than “them.”
Reversal	Reversal is a form of polarization, but the individual affiliates with another cultural group; that is, the “us” that is better than the “them” is a cultural group the person does not belong to.
Minimization	Minimization is the middle stage of the model; it is considered kind of an end stage or transition stage from ethnocentrism to ethno relativism. People at minimization view all people as fundamentally the same, with differences being only superficial. Whether it is the idea that we all have the same biology or the idea that we should all be subject to the same universal laws, people at this stage overestimate their intercultural development and overemphasize similarities between cultures.
Acceptance	The first of the ethno relative stages, this is the stage of non-evaluative recognition. In my experience, people at this stage sometimes experience paralysis, because they properly recognize different realities and experiences for the first time and do not know how to properly respond to these newly recognized differences.
Adaptation	At this stage, a person both recognizes cultural differences and can both cognitively and behaviorally adapt to cultural differences.
Integration	At this stage, disparate parts of a person’s multicultural identity are integrated, and a person is unconsciously competent, effortlessly adapting effectively in intercultural situations. This is usually typically of people who have extensive experience in multiple cultures.

Employing a purposeful sampling approach, the researcher reviewed the journals the participants had submitted as part of the non-traditional hybrid diversity program. Participants granted permission for the researcher to analyze journals for evidence that suggested that transformative learning might have occurred. Evidence included critical reflection, experiencing a disorienting dilemma, questioning paradigms, assumptions and behaviors, trying out new paradigms, and exhibiting new perspectives. Following selection of participants, the researcher conducted

face-to-face interviews and then some follow-up e-mail exchanges occurred to seek additional insights and clarifications. Data analysis following the IPA approach was implemented and initial insights and observations were developed.

As a consequence of the pilot study, some refinements were made that have influenced the design of the main study. First, attention was given to strengthening the interview questions so that the researcher could gain a better understanding of how the non-traditional diversity training program impacted the participants' experiences. The pilot interviews also encouraged the researcher to adopt a more open coding style, rather than using a purely theoretical deductive approach. The pilot interviews also revealed the need for the researcher to be a more active listener and to adhere to the logic and flow of the semi-structured interview protocol as opposed to going off script. Appendixes A through D provide additional information regarding the pilot interviews.

Design of the Study

This study employed a qualitative phenomenological embedded case study design in order to gain in-depth understanding and provide thick, rich descriptions (Merriam, 2009) of the case—a non-traditional diversity training program and the experiences of the participants who were embedded in the program. Participants were purposefully selected from the cohorts of graduates of this voluntary program (Bryman & Bell, 2015). Semi-structured interviews were used to collect data, and interpretive phenomenological analysis (IPA) was used to analyze the data, because the goal of the study was to understand the experiences of participants and the sense they made of these experiences (Smith & Osborn, 2003). The study originally sought to include interviews with participants' supervisors, co-workers, and/or family members to provide confirmatory information. This option, however, did not prove feasible, and publicly available artifacts such as blogs and course syllabi were used instead; these supplementary document reviews and observations of public actions further confirmed self-reported changes in thinking and behavior. Rigor and robustness were comprised of member checking, peer and colleague examination, and the maintenance of an audit trail.

Significance of the Study

The HRD field is concerned with learning, development, change, and maximizing talent. Therefore, diversity management and leveraging diversity are important issues that require further study because the field has been criticized for not focusing enough on diversity issues (Bierema, 2002; Gedro, Cervero, & Johnson-Bailey, 2004; K. M. Thomas, Bierema, & Landau, 2004). Consequently, given these criticisms and the shortcomings in the existing diversity education and training literature, understanding the impact of diversity training and how to optimize diversity training to achieve desired outcomes is critical. Specifically related to diversity and inclusion scholars and practitioners, these insights will seek to contribute to the existing literature on diversity and inclusion and provide insights into the antecedent factors that may facilitate transformational learning for inclusion and positive interactions, the outcomes of such training, and consideration of training design and content issues that may also influence transformational learning to occur.

As strategic partners responsible for helping organizations maximize talent and adding to the bottom line, HRD practitioners will benefit from insights that help diversity training impact behavior as this can result in improved employee morale, engagement, and satisfaction and decreased discrimination, turnover, and discrimination lawsuits; all outcomes that positively affect the bottom line (Kalinowski et al., 2012; King et al., 2010; McKay et al., 2008). Exclusion is expensive, as evidenced by the high cost of defending and settling discrimination suits (Burns, 2012). Positive diversity climates help mitigate the negative impacts of diversity (Kulik, 2014), and diversity training is one approach to foster a positive diversity climate (King et al., 2010; McKay et al., 2008).

Assumptions

This study was based on the assumption that an ethnocentric mindset is learned, consciously or unconsciously, throughout an individual's life, especially early on (Lieberman, Rock, & Cox, 2014; Mezirow, 1997, 2006). As such, one assumption in this study was that ethnocentrism can also be unlearned or more accurately, an ethnorelative mindset can be developed. Furthermore, another assumption was that not all paradigms or mindsets are

conscious; some of this unconscious thinking might be in direct opposition to conscious thoughts and self-perception, and this unconscious thinking influences action. Further, an assumption of this study was that participants would honestly respond to the semi-structured interview questions posed to them and would be able to accurately reflect on their past experiences in the program and convey them.

Definition of Terms

Culture. Refers to patterns of beliefs, behaviors, and values learned and shared among a group of interacting people (M. J. Bennett, 1993).

Diversity. Diversity refers to a range of characteristics, observable and non-observable, innate or acquired, that distinguish one individual from another (Cox, 1993; Kochan et al., 2003; Milliken & Martins, 1996; Tsui, Egan, & O'Reilly, 1992).

Diversity education. According to renowned diversity practitioner Roosevelt Thomas, diversity education refers to learning that focuses on the principles, concepts, and framework under girding diversity, rather than on skills or specific action steps (C. D. Johnson, 2008). This focus on the cognitive and affective domains of diversity learning tends to happen mostly in classroom contexts, facilitated by someone with an advanced degree in a related diversity discipline (King et al., 2009).

Diversity training. Diversity training refers to programs that educate employees about differences that influence workplace behavior and encourage employees to work with and across differences in order to create a positive work environment (Lai & Kleiner, 2001; McGuire & Bagher, 2010; Pendry et al., 2007).

Ethnocentrism. Ethnocentrism refers to the tendency to place one's culture at the center of reality and evaluate other cultures through the lens of one's own, often resulting in a sense of the superiority of one's culture (Andersen & Taylor, 2007).

Ethnorelativism. Refers to the understanding that culture is one of many valid realities; this understanding results in the ability to shift cognitive frames and behavior, depending on cultural context (J. M. Bennett & Bennett, 2004).

Inclusion. According to Shore et al. (2010), inclusion refers to a person's sense of feeling valued, both for unique attributes (uniqueness) and as part of a team (belonging). For example, Pelled, Ledford, and Mohrman (1999) found that employees felt included when they believed they had access to information, a say in decision making, and job security.

Intercultural competence. Refers to the knowledge, skills, and attitudes required for effective interactions across cultural differences (M. J. Bennett, 1998).

Mental model. A mental model has many synonyms in different fields and spheres, including paradigm, mindset, frame of reference, ideology, framework (Austen, 2014; Dweck, 2006; Kuhn, 1975; Mezirow, 2007; Senge, 1990). What these terms share in common is the idea that a mental model serves as filter, sorter, and interpreter of information, guiding thinking, and action (Austen, 2014).

Transformative learning. Transformative learning refers to the process by which an individual's frame of reference or meaning perspective is changed (Mezirow, 1997, 2006).

Unconscious bias. Unconscious bias refers to the hidden patterns of thinking, beyond conscious awareness, that impact human behavior (Ross, 2008).

Summary of the Chapter and Organization of the Dissertation

The chapter introduced the background to the problem, the statement of the problem, the purpose of the study, and the research questions that guided this study. It also presented the theoretical and conceptual underpinnings of the study, an overview of the pilot study, the design of the main study, and the approaches for data collection and analysis. The significance of the study, assumptions of the study, along with the presentation of definitions were also addressed. Chapter 2 reviews the relevant domains of literature that informed the study.

Chapter 3 presents the design and method of the study. Chapter 4 presents portraits of the participants. Chapter 5 presents the findings of the study, and lastly, Chapter 6 discusses the findings in relation to the existing literature. This chapter also presents the major conclusions of the study, implications for practice, contributions to research and theory, and recommendations for future research.

Chapter 2

Literature Review

Introduction

This chapter reviews the domains of literature relevant to studying diversity and inclusion and transformative learning. It is organized into four sections. The first section explores diversity and inclusion in organizations. The second section reviews the history, determining factors, models, outcomes and critiques of diversity, and intercultural training and education. The third section reviews mental models, unconscious bias, and prejudice. The fourth section reviews transformative learning and its relation to diversity and inclusion. The chapter concludes with a summary highlighting and integrating critical pieces of the literature related to this study.

The computer systems of the Robert R. Muntz Library at The University of Texas at Tyler and the Library at Champlain College were used for conducting the literature search in support of this study. The following databases were searched: Ebscohost, Business Search Complete, Sage: Management and Organization Journals Online, Emerald Full Text, Wiley Online, PsychINFO, Science Direct, and Google Scholar. The following primary search terms were used: *diversity education, diversity training, transformative learning, transformational learning, transformative education, intercultural development, intercultural competence, cross-cultural training, multicultural education, and intercultural communication*. These terms were combined with each other and also combined with the following secondary terms: *mental models, behavior, skill, prejudice, outcomes, impact, attitudes, awareness, performance, and organizations*. Additionally, a manual search of relevant journals for diversity training content was conducted. These journals included *Human Resource Development Quarterly, Human Resource Development Review, Human Resource Development International, Advances in Developing Human Resources, Adult Education*

Quarterly, Journal of Transformative Education, Academy of Management Learning and Education, Academy of Management Review, Human Resource Management Review, and Personnel Review.

Diversity and Inclusion in Organizations

Diversity refers to the presence of multiple cultures, backgrounds, and perspectives in the workplace (Kalinowski et al., 2012; McGuire & Bagher, 2010). Similarly, K. M. Thomas et al. (2004) defined diversity as “the differences, similarities and related tensions that can exist among the elements of a mixture” (p. 3). Peretz, Levi, and Fried (2015) defined workplace diversity as “the degree to which the organizational workforce consists of people with different background characteristics” (p. 875). *Inclusion* is a more ambiguous term that refers to the creation of access to previously excluded groups and the intentional engagement with diversity to create positive outcomes (Dobusch, 2014). Diversity can be viewed as a noun—the presence of various individuals and groups. Inclusion can be viewed as a verb—what one does with diversity. Inclusion can also be viewed as the vehicle to what can be (Geiger & Jordan, 2014; Joshi, 2014).

Shore et al. (2010) applied the optimal distinctiveness theory (Brewer, 1991) to create a model of inclusion. Optimal distinctiveness theory attempts to reconcile the tension between an individual’s desire to belong to a larger community and the desire to be a unique individual. Based on this thinking, Shore et al. (2010) defined inclusion as “the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness” (p. 1,265). The authors asserted that people feel included when they are valued for their uniqueness and when they feel like a part of the larger group. According to the authors, an organization’s valuing individuals for their uniqueness without treating them as organizational insiders results in differentiation, while treating individuals like insiders without valuing their uniqueness leads to assimilation, as the individuals feel pressured to adopt the norms and values of the dominant group in order to maintain their standing with the community.

Increasingly, the concept of intersectionality is being foregrounded in diversity and inclusion conversations. The term *intersectionality* was coined by Crenshaw (1989, 1991) and extended by Black feminists, especially queer Black feminists (e.g., E. P. Johnson, 2016). The term refers to the ways social identities overlap or intersect to compound or mitigate the experience of exclusion or discrimination. Although outside the scope of this study, intersectional conversations address the multidimensionality of human experience and identity and allow for complexity in research regarding the processes of oppression and exclusion (Dhawan & Castro Varela, 2016). As such, these conversations have added nuance and complexity to conversations about diversity and have allowed people with dual or multiple subordinated identities to find their places in those conversations (Levy, Saguya, van Zomeren, & Halperin, 2017). For example, Vaccaro (2014) asserted that an exploration of campus climate for women is incomplete unless it includes subpopulations such as women of color. A counter argument to an intersectional approach is that it provides cover for dominance, particularly racism, because people might avoid engaging with difficult matters like racism under the guise of wanting to be inclusive (Rodriguez & Freeman, 2016).

The business case for diversity and inclusion. The world of work is becoming increasingly multicultural, global, and interdependent, moving from a reality in 2012 wherein 17% of the workplace was comprised of ethnic minorities, nearly 50% were women, and 8.2% were foreign born, to a future reality in 2050, where minorities, foreign-born, and older workers will dominate the workplace (Toossi, 2006). Researchers indicated that companies with diverse boards perform better, and a cross-national study showed that companies with high numbers of women and culturally diverse individuals had much higher returns on equity and earnings margins than their less diverse peers (Barta, Kleiner, & Neumann, 2012). Researchers also showed that diverse teams can outperform non-diverse teams, and diverse teams have an increased capacity for innovation (Cox & Blake, 1991; Hong & Page, 2001, 2004; Page, 2007). Another comprehensive study surveyed 1,800 professionals, analyzed 40 case studies, interviews, and focus groups, and revealed that companies with leaders with 2-D diversity (2-D diversity refers to an individual who possesses at least three inherent diversity traits such as being a woman, a person of color, gay, from another country,

etc., and three acquired diversity traits, such an understanding of other cultures, providing space for non-dominant group members to speak up, etc.) were 45% more likely to report that they saw market share growth over the last year and 70% more likely to report that the firm had “captured a new market” (Hewlett, Marshall, & Sherbin, 2013, para. 4). The researchers also found that a team that had at least one member with the same ethnicity as the client was 152% more likely to understand the client.

However, the positive impact of diversity is not automatic, and the presence of such diversity can be good, bad, or neutral, depending on how the diversity is engaged (Curtis & Dreachslin, 2008; Ehrke et al., 2014). Furthermore, the cost of not managing diversity effectively can be very high. Hewlett et al. (2013) discovered that in companies without 2-D diversity, women were 20% less likely to win support for their ideas than their heterosexual counterparts. The corresponding percentages for people of color and members of the Lesbian, Gay, Transgender, Bisexual, and Queer (LGTBQ) community were 24% and 21%, respectively. Other studies have documented the financial cost of exclusion and discrimination. For example, workplace discrimination lawsuits can cost an average of \$250,000 per case, and employers paid \$638 million in 2013 to settle discrimination cases (Seyfarth Shaw, LLP, 2014).

A 2007 study of employees who left corporations revealed that turnover due to perceived unfairness cost employers \$64 billion (Burns, 2012; Ross, 2008). Besides direct, quantifiable costs, many intangible costs resulted from decreased engagement, increased absenteeism and turnover, increased conflict, and lower morale (Avery, McKay, & Wilson, 2008; Jehn, Northcraft, & Neale, 1999; Tsui et al., 1992). Indeed, a 2005 Gallup poll discovered that morale was lowest when employees felt discrimination (Gallup, 2005). The Gallup study also showed that discrimination had a direct impact on organizational loyalty and retention.

To ensure positive outcomes of diversity, strategies for managing diversity and creating inclusive workplaces will become increasingly important to maximize employee engagement and productivity and thus must be a priority for the field of human resource development (HRD), as affirmed by Hite and McDonald (2010):

Globalization and workforce demographics have made diversity an organizational concern. In response, organizations typically have made diversity work a human resource development (HRD) responsibility, because diversity initiatives fit traditional HRD functions of training and development, career development, and organization development. (p. 283)

Indeed, practitioners, scholars, and managers have been challenged to view diversity and inclusion as an organizational development initiative (Bendick et al., 2001; Fujimoto & Härtel, 2017). In line with this thinking, Gardenswartz and Rowe (1994) proposed a holistic approach to diversity and inclusion work in organizations comprised of executive support, assessment and diagnosis, training, the creation and leveraging of a diversity council, system changes, measurement, and integration of these efforts. As organizations struggle to create inclusive workplaces, taking this holistic approach to diversity has been a challenge, and many organizations continue to rely on singular and isolated initiatives (Jayne & Dipboye, 2004). It is also important to note that increasingly, the business case for diversity is being critiqued as too narrow and lacking an emphasis on equity and social justice (Knights & Omanović, 2016).

Wentling (2004) conducted interviews with eight diversity managers, each from a multinational company listed in the *Directory of Diversity in Corporate America*. The organizations had a combined total of 396 diversity initiatives, which Wentling classified into seven broad categories (leadership and management, education and training, community relations, communication, performance and accountability, work-life balance, and career development and planning). All of the organizations had focused on race and gender, including the advancement of these groups, as well as work-life issues and sexual harassment. Content analysis of the results revealed some common themes. Common facilitating factors were having a strategic plan, integrating diversity goals into larger organizational goals, having multiple initiatives going on at the same time, personal commitment, understanding the business case and recognizing the benefits of diversity, supportive culture, top management commitment, and recognizing that diversity is more than an HR initiative. Common hindering factors or barriers were competing

agendas, size and complexity of the organization, economic factors, people not understanding or supporting diversity, slow involvement with diversity initiatives, and difficulty in evaluating diversity.

The most common diversity and inclusion initiatives and programs are affirmation action/equal employment opportunity (EEO) policies and practices; diversity training and education; mentoring, leadership development, and fast track programs for underrepresented groups; specialized diversity staff; taskforces, committees, or councils; diversity plans; internal and external advisory stakeholder advisory boards; and employee resource or affinity groups (Curtis & Dreashlin, 2008; Kalev et al., 2006). Of the frequently used diversity and inclusion programs and recommendations, diversity training is the most widely used, with 71% of companies in 2005 and 68% of companies in 2010 (Esen, 2005; Society for Human Resource Management [SHRM], 2010) responding that they had a diversity training program (Curtis & Dreashlin, 2008). Diversity training is estimated to be a \$200 million a year industry, representing a significant investment that should provide some return (Bennett, 2010; Chung et al., 2017; Page, 2007; Vedantam, 2008).

Defining diversity training and diversity training approaches. Diversity training refers to processes and programs that are intended to facilitate awareness and learning about cultural, personal, societal, and other differences, with the goal of improving intergroup relations (Lai & Kleiner, 2001; McGuire & Bagher, 2010; Pendry et al., 2007). Traditionally, diversity training has had as its goal the improvement of experiences of minority groups, either by reducing prejudice against these groups, or by teaching all employees to work successfully with others different from themselves (Bendick et al., 2001; McGuire & Bagher, 2010; Pendry et al., 2007). However, foci on diversity as a resource to be leveraged and working across differences as a valuable competence to be developed have gained purchase and are now strong drivers of diversity initiatives, including diversity training (Anand & Winters, 2008; McGuire & Bagher, 2010).

Diversity training vs. diversity education. The terms *diversity training* and *diversity education* are often confused. Diversity education programs in both organizational and academic settings share the common goal of

impacting cognitive, affective, and behavioral outcomes (Kulik & Roberson, 2008, p. 2). However, in an interview, noted diversity practitioner Roosevelt Thomas, Jr. clearly distinguished between diversity education and training as follows:

Diversity education for me is about mind-set shifts. If we are going to go through a diversity educational program, fundamentally we are going to talk about concepts. We are going to talk about principles and frameworks. Diversity training for me is more skill building and tactics conveying, the five “to do’s.” I believe this is probably the way that I think about diversity and diversity management. Quite frankly, we have to be careful about giving people skills and tactics without the conceptual underpinning. So, I think there is a need for education and training. However, in corporate America, 9 times out of 10, they are interested in training and not education. (C. D. Johnson, 2008, p. 408).

King et al. (2010) acknowledged that the best practices from diversity training and education should be integrated to maximize impact. They offered diversity best practices derived from diversity training as needs assessment, emphasis on skill and behavior, and inclusion of opportunities for demonstration and practice. King et al. (2010) presented best practices from diversity education as defined performance metrics, frequent and required performance evaluations, and a focus on cognitive and affective processes. While diversity training is prevalent in corporate settings and diversity education is prevalent in education settings, this separation is not always the case, and some programs, such as the one examined in this qualitative phenomenological case study, might choose to combine both educational and training elements (King et al., 2010).

According to a survey by Bendick et al. (2001), the average diversity program runs from four to 10 hours, includes one or two trainers, and has between 20 and 30 participants. Many types of training, including anti-bias training, compliance training, and cross-cultural training can fall under the umbrella of diversity training (Ferdman & Brody, 1996; McGuire & Bagher, 2010). Diversity training content can be narrow or broad, based on how an

organization defines diversity or based on the attributes of diversity an organization chooses to focus on, regardless of how broadly they define diversity (Hite & McDonald, 2006; Holladay & Quiñones, 2008).

Narrowly focused diversity training typically addresses one social identity, usually race or gender (Hite & McDonald, 2006), but also may include sexual orientation, country of origin, or disability. Narrowly focused diversity training can also be referred to as training that is primarily compliance-focused (Ferdman & Brody, 1996). Broad diversity training focuses on difference(s) in general and/or includes a wide variety of diversity attributes and categories, including geographic region and functional area (Hite & McDonald, 2006). Gardenswartz and Rowe (1994) have created a widely used diversity circle (Figure 1). All of these attributes can be included in diversity training content. According to Ferdman and Brody (1996), what these trainings have in common is the exploration of the impact of difference on work relationships and organizational outcomes. This literature review, therefore, drew from a variety of disciplines, including intercultural communication, psychology, sociology, anthropology, neuroscience, business, human resources, and human resource development.

The Historical Evolution of Diversity Training in Organizations

Diversity training has reflected the diversity paradigms of its time, and an exploration of the history and evolution of diversity training leads to a review of the paradigms that have shaped diversity work. These paradigms include the discrimination and fairness paradigm, the access and legitimacy paradigm, and the learning and effectiveness paradigm.

According to Anand and Winters (2008), the first wave of diversity training (as this training is understood today) was the compliance era spurred on by the Civil Rights Act of 1964. Civil rights compliance training was supported by the strict enforcement of the law that existed throughout the 70s. The often mandatory training sessions associated with this era were primarily designed to protect organizations from violations and lawsuits. As such, their goals were focused more on raising awareness about what could be considered discrimination or harassment and less on the integration or taking advantage of differences. Conversations around this time were deficit-based in terms of

minority groups, focused on race and gender, and were often polarizing (Anand & Winters, 2008; Shore et al., 2010). These types of trainings reflected the discrimination and fairness paradigm of diversity and inclusion work, which focused on redressing historical inequities (Ferdman & Brody, 1996). This paradigm was heavily focused on race and gender. Affirmative action programs and compliance training programs were hallmarks of this paradigm, while assimilation, the expectation that minority groups would adopt the values, norms, and behaviors of the dominant culture, was viewed as a negative outcome of this paradigm (Anand & Winters, 2008; Ferdman & Brody, 1996; Phelps, 1997; Strachan et al., 2010).

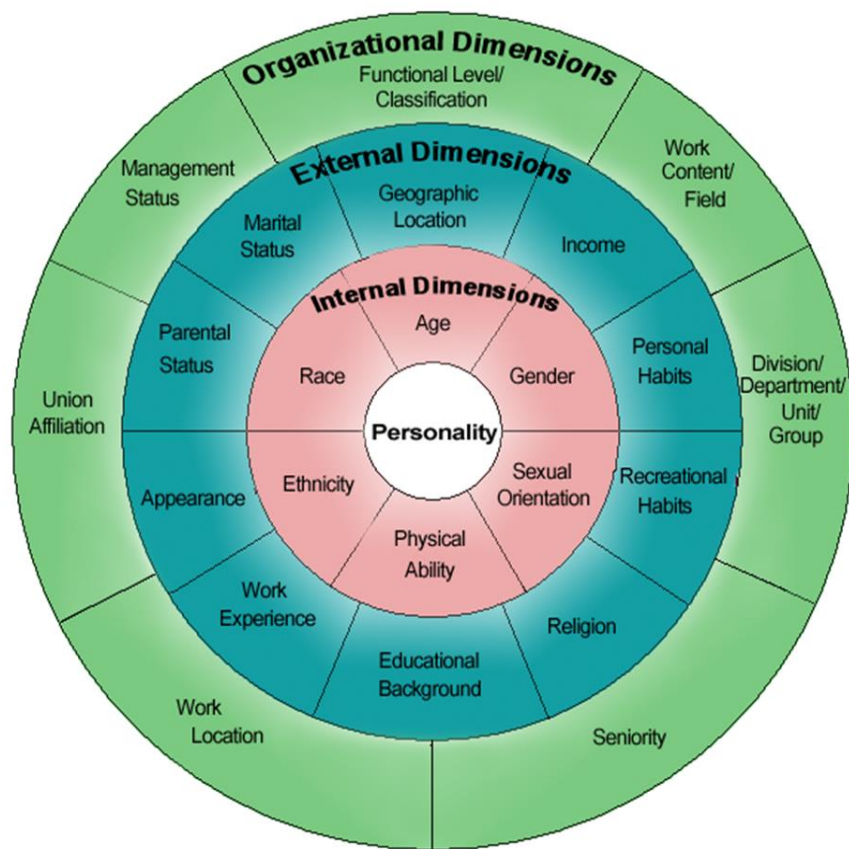


Figure 1. Dimensions of diversity. From *Diverse Teams at Work: Capitalizing on the Power of Diversity*, by L. Gardenswartz & A. Rowe, 1994, Chicago, IL: Irwin. Copyright 1994 by Gardenswartz & Rowe. Reprinted with permission.

According to Anand and Winters (2008), assimilation efforts were a focus of many corporations during the compliance era, especially as the intensity placed on the enforcement of civil rights laws waned and the entrance of people of color stalled (although increases in the number of female employees continued). Efforts were designed to help minorities and/or non-dominant groups fit into the dominant culture; female leaders learned to be “one of the boys,” and people of color were taught to code switch or adopt dominant culture norms and ways of being (Anand & Winters, 2008; Meyerson, 2001). Minority leaders who were successful in advancing their careers sometimes espoused this way of being and/or saw it as a way to open the doors for others (Meyerson, 2001).

The end of the 1980s launched the diversity field as it is known today, with an emphasis on valuing differences rather than trying to subsume differences into a unified whole. In the context of education, multicultural education took hold, with a rejection of the assimilation paradigm and a demand for multiple voices, perspectives, and heroes (LaBelle & Ward, 1994). On the corporate side, the *Workforce 2000* report generated interested and anxious reactions and brought the diversity conversation front and center (Anand & Winters, 2008). The report opened advanced conversations about the equipping, retention, and advancement of minorities, and diversity efforts began to reflect an access and legitimacy paradigm. The thrust of this paradigm was the desire to have a workforce that reflects the customer base that organizations serve and represents the communities in which organizations work. This approach expanded beyond race and gender as the foci of diversity and inclusion efforts to include multiple cultural and linguistic identities, disabilities, and other human variables (Ferdman & Brody, 1996; Phelps, 1997; Strachan et al., 2010; R. R. Thomas, 1990).

This paradigm and approach matched the widening conversations that included other sources of diversity during the 1990s. Technology accelerated globalization and global interdependence, amplifying conversations about the need for global and cross-cultural competence. This discourse extended the access and legitimacy paradigm until it evolved into a learning and effectiveness paradigm, which is the paradigm that drives much of diversity and inclusion work today (Anand & Winters, 2008; Ferdman & Brody, 1996; Qin, Muenjohn, & Chhetri, 2014;

Theodorakopoulos & Budhwar, 2015). The business case paradigm is concerned with maximizing diversity and leveraging differences. It strives to create an environment wherein both differences and similarities are recognized and celebrated and difference is used to impact the bottom line (Cox, 1993; D. A. Thomas & Ely, 1996; Qin et al., 2014).

Design factors affecting diversity training outcomes. Earlier studies on the impact of diversity and inclusion yielded concerning results, such as worsened treatment against minorities post training and White men feeling blamed and attacked (Combs & Luthans, 2007; Hemphill & Haines, 1997; K. Y. Williams & O'Reilly, 1998). These results prompted some to call for the end of diversity training or at least a radical reconceptualization of it (Bregman, 2012). In response, several individual and organizational factors have also been explored to determine their impact on the outcomes of diversity training. For example, L. Roberson et al. (2001) examined the impact of homogeneous and heterogeneous group composition on the impact of diversity training. Their sample was a group of 127 graduate students, who were randomly assigned to racially homogeneous or heterogeneous groups. Both groups participated in a four-hour voluntary diversity training program and were measured along dimensions of knowledge and attitudinal and behavioral intention. The only difference in outcomes between the racially homogeneous and heterogeneous groups occurred with students who had completed prior diversity training. These students had higher outcomes if they had participated in a homogeneous group. The authors hypothesized that social and behavioral modeling might work best in homogeneous group settings. Another study by Holladay, Knight, Paige, and Quiñones (2003) examined reactions to diversity training based on framing of both the title of the program and the training context. The study discovered that respondents preferred a direct title (one with diversity in it) and non-remedial framing, that is, the training was not designed to fix deficits in managerial or employee ability.

Holladay and Quiñones (2008) examined whether diversity training was more effective if it took a narrow or broad diversity content focus and discovered that training was better received when it had a broad focus, that is, when training looked at difference in general or at multiple forms of difference but reiterated the importance of

context and goals for determining diversity training focus. Bezrukova et al. (2012) also pointed to the documented benefits of training that broadly discusses diversity without focusing on any one group or creating a confrontational atmosphere. Kulik and Roberson (2008) examined the impact of voluntary versus mandatory diversity training and concluded that in spite of concerns about backlash and the motivation of voluntary attendees, mandatory diversity training was preferable because it signaled the importance of diversity to the organization. According to Holladay and Quiñones (2008), learning and reactions are improved when diversity training focuses on similarities among individuals, rather than on differences. Additionally, minority trainers are viewed more positively as diversity trainers, bucking a trend in other (non-diversity training) contexts where minorities are viewed less favorably or as less qualified.

Chung et al. (2017) examined the impact of pre-training readiness (motivation, self-efficacy, and intention to use), as influenced by perception of ethnic discrimination, on the outcomes diversity training. They hypothesized that a person who has experienced ethnic discrimination will have a better understanding of the process and therefore feel more confident about their ability to learn diversity training content, and because of those negative experiences, they will be more motivated to use the content of the program in order to establish positive relationships with others and more likely to use the content. In other words, perception of ethnic discrimination was positively correlated with pre-training readiness. Similarly, ethnic similarity between supervisor and subordinate was hypothesized to positively correlate with trainee readiness for diversity training, because dissimilarity between supervisor and subordinate increased the chances that the subordinate had outgroup experiences and lower quality interactions with their supervisor. Analysis of 160 surveys administered and collected by 26 students in a master's program, for extra credit, to known colleagues and friends revealed that ethnic discrimination was positively correlated with motivation and intention to use but not with self-efficacy. No correlation occurred between dissimilarity between supervisor and subordinate and pre-training readiness, but ethnic dissimilarity moderated the relationship between ethnic

discrimination and the pre-training readiness such that pre-training readiness was stronger when participants had experienced ethnic discrimination and were ethnically dissimilar from their supervisors.

Outcomes of diversity training. In general, Kulik and Roberson (2008) discovered that diversity training improves attitudes towards diversity in general. However, Ashburn-Nardo, Morris, and Godwin (2008) and Paluck and Green (2009) found that diversity training does not reduce prejudice or attitudes towards minorities. This is especially concerning because changing behavior was one of the top cited reasons for providing or requiring diversity training (Bendick et al., 2001; Galen, Palmer, Cuneo, & Maremont, 1993).

Combs and Luthans (2007) conducted a study to determine whether diversity training impacted diversity self-efficacy. Participants were 276 individuals from three medium-sized organizations in the manufacturing, insurance, and government industries, all of whom had established equal opportunity policies but had not instituted formal and systemic diversity training. The participants worked in a variety of positions from managerial to administrative and physical support, although the largest portion were supervisors or managers. They averaged 20.3 years' experience and were in the 18 to 41 age bracket with 63 possessing some college education or more. Ninety-three percent of the participants were White. The training was a six-hour, one-day session that incorporated case scenarios, role playing, group interaction exercises, video, feedback, and positive affirmation, as well as a focus on the benefits of diversity and the consequences of managing diversity poorly. The diversity self-efficacy survey was administered as a pretest and as a posttest both immediately after training and a year later. The researchers discovered that diversity self-efficacy was increased after the training, with no significant difference in terms of gender, age, education, or total work experience. The gains remained for a large population of participants after a year. These findings were significant because self-efficacy was validated as a measure of behavioral intent, which in turn has been shown to accurately predict behavior.

In a comprehensive review of evaluative articles assessing the impact of diversity education and training, Kulik and Roberson (2008) analyzed 71 articles representing 74 studies that assessed the outcomes of diversity

training or education programs of varying types and lengths, occurring both in educational and organizational settings. Their review revealed that diversity had a positive impact on increasing knowledge about diversity and knowledge about members of other groups. These results held true both in educational and organizational settings and occurred whether the training was half a day, a full day, or a semester-long course. The studies also showed that diversity training improved general attitudes toward diversity and diversity and inclusion efforts. Studies that reviewed the impact of diversity training on attitudes towards minorities had mixed results, with many showing that diversity training did not have a positive impact on more subtle measures of bias such as modern racism or implicit bias. The review showed that diversity training and education's impact on skill was the weakest, although courses including behavioral modeling did show some positive results.

Responding to Bendick et al. (2001) and other articles that emphasized that the reduction of discrimination among minorities was one of the chief goals for diversity training, King et al. (2010) examined the impact of diversity training on ethnic discrimination and job satisfaction of health care employees in the United Kingdom. Their research revealed that diversity training did in fact reduce incidents of ethnic discrimination. They further established that those experiencing less discrimination had higher levels of job satisfaction. The authors concluded that in evaluating diversity, non-traditional measures such as the reduction of prejudicial behaviors should be considered along with traditional measures such as an increase in knowledge. They also highlighted the role organizational factors play in attributions made about ethnic discrimination; that is, organizational factors impacted whether employees attributed the cause of discriminatory behavior to themselves as individuals, their group affiliation, or the organization.

In a study of data from 819 organizations covering 23 years, Dobbin, Kim, and Kalev (2011) examined the impact of forces influencing six diversity programs, including diversity training. The study revealed that need, such as the absence of workforce diversity, was not a driver of diversity program adoption. The presence of a diverse workforce both in managerial and non-managerial ranks was also not a driver of diversity program adoption.

Industry pressure (external) and internal pressure from White female managers (the only non-dominant group to have achieved a significant number of managerial positions in organizations) are the factors that favor diversity program adoption. Also, high levels of either internal or external pressure nullified the effect of additional pressure from a different source (internal or external). Confirming previous studies, corporate culture, as evidenced by factors such as the presence of formalized diversity policies and the support of top management, influenced diversity program adoption.

Enger and Lajimodiere (2011) explored the impact of an online diversity training course on 18 doctoral students. Applying Banks's (1993) model of transformative multicultural education and seeking to leverage the online environment to create open spaces for dialogue and expose students to experiences beyond their rural, homogenous communities, the authors exposed students to writings related to critical pedagogy, films related to the Holocaust, standing up for one's values, and personal experiences of minorities who had struggled but ultimately triumphed in their quest for higher education. Students reflected on these materials, kept journals, and engaged in free dialogue with each other. The results of a pre- and posttest showed gains in students' awareness of their Eurocentric privilege and the impact this had on their lives, as well as an increased appreciation for cultural differences.

Kalinoski et al. (2012) also explored the impact of diversity training on cognitive, affective, and behavioral outcomes by reviewing 65 articles that quantitatively assessed the impact of diversity training. The researchers asserted that affective outcomes are the most frequently studied and that most assessment relies on self-reported data. The authors also distinguished between implicit and explicit outcomes. Implicit outcomes are outcomes and processes often out of the reach of an individual's consciousness, while explicit outcomes are conscious. Their analysis of the articles showed a positive impact on cognitive and behavioral outcomes but a weaker impact on affective outcomes. Kalinoski et al.'s analysis revealed design elements that supported affective impact, including the opportunities for social interaction such as active training, interdependent tasks during training, face-to-face

training, and distributed training. Diversity education was revealed to have a larger impact on affective outcomes than diversity training, and a focus on a single aspect of diversity (e.g., race) was revealed to have a larger impact on affective outcomes than a multicultural or broad approach. Finally, the analysis also revealed that trainer, trainee, and context impacted training outcomes. For example, internal managers leading the training had a bigger impact on affective outcomes than when internal others, such as diversity managers, led the training. The opposite, however, was true when looking at cognitive outcomes (internal others had a bigger impact on cognitive outcomes than internal managers). As was expected, trainee motivation impacted outcomes. Researchers also noted that outcome gains were higher for employees than for students.

Chung (2013) synthesized the work of prior researchers to present several propositions that impact trainee readiness and transfer of training. Factors that increased trainer motivation and readiness included perception of organizational discrimination or being a target of discrimination; being an out-group member; self-efficacy; higher levels of cultural competence; knowledge, skills and abilities related to diversity; and a sense that the training had utility and was valued by the organization.

In study of 44 organizational leaders across a variety of industries (healthcare, oil and gas, education, etc.), functions (human resources, information technology, purchasing, etc.), and levels (executive, mid-level director, managerial, nonmanagerial professional, etc.), Woodson (2013) discovered that all kinds of diversity training, regardless of length or approach, had a positive impact on the self-awareness of the respondents and their commitment to diversity and inclusion matters in their organizations, and these participants scored highly on questions that were correlated with the ability to create an inclusive climate.

In an experimental study, Homan, Buengeler, Eckhoff, Van Ginkel, and Voelpel (2015) explored the impact of diversity training on reaping the impact of national diversity. Based on the existing literature, the team hypothesized that diversity training could be effective and enhance team creativity but only when positive diversity beliefs existed and when the team itself was diverse. Homan et al. (2015) also hypothesized that team self-efficacy

would serve as a mediator between trainee readiness, diversity beliefs, and diversity training. The study sample consisted of 192 undergraduate students from 18 different majors and representing 41 nationalities with a third of the students from Germany. Compared to control groups, national diversity training had a positive impact on team self-efficacy and creativity when the teams had less positive diversity beliefs pre-training. Conversely, national diversity training had a negative impact on team creativity and no impact on team self-efficacy when the teams were not diverse by nationality.

Transfer of diversity training. Diversity training is unlike other types of training because participants have often formed opinions about the subject matter beforehand, and diversity training seeks to access deeply held paradigms (Bezrukova et al., 2012; Paluck, 2006). This in-depth interaction increases the likelihood that diversity training experiences will be emotionally charged ones. Like other training, though, the transfer of learning that takes place during and after such training is dependent on a variety of contextual factors.

Rynes and Rosen (1995) surveyed 785 human resources professionals to get a sense of diversity practices and factors that influenced their success in organizations. The study revealed that while diversity training experiences are more emotionally charged than many other trainings, they shared elements with other trainings, particularly with regards to the influence on organizational factors of training design and, as discussed above, transfer of training. Rynes and Rosen (1995) discovered that organizational factors that led to more positive outcomes of diversity training included larger organizations; organizations with visible top management support and strong, positive managerial beliefs about diversity; the placing of high strategic importance on diversity in the face of competing organizational priorities; and organizations with specialized diversity staff and multiple formalized policies related to diversity. Interestingly, results did not support the hypothesis that organizations with more managerial diversity would facilitate more positive outcomes of diversity training. Rynes and Rosen theorized that this finding occurred because managerial ranks are dominated by White males. In light of the fact that most high profile CEO supporters of diversity have been White males, the researchers also suggested that beliefs and commitment, rather than

demographic variables, are what are important for positive diversity outcomes. The study also revealed that according to 60% of respondents, short-term benefits from diversity training were not sustained over the long term. This failure of long-term transfer correlated with the absence of organizational factors supporting the transfer of training supported above.

Hanover and Cellar (1998) evaluated a diversity training workshop and a *Fortune* 500 company in the Midwest. The experimental study consisted of 99 middle managers, 48 of whom were randomly assigned to the group that received the treatment (i.e., participated in the study) based on ability. Pretest measures were administered to both the control and treatment group and showed no significant difference in measures. The results from the analysis of the posttest's self-reported data showed that participants in the training groups exhibited a higher value for diversity-related management practices and for diversity training in the posttest than in the pretest. The self-perceptions of engaging in behavior that supported diversity also significantly increased. Social variables supported transfer of training and improved attitudes; environmental (work) variables did not. Finally, trainee reactions were correlated with learning and behavior, which was of particular note because of the criticism that training evaluations only focused on trainee reactions.

Grounded in Azjen's (1991) theory of reasoned action (which posits that intentions are the primary determinants of behavior and that these intentions in turn shape attitudes towards the behavior, subjective norms and perceptions of control), Wiethoff (2004) sought to explain what caused employees to actively participate in diversity training and what caused the training to impact behavior on the job. Wiethoff developed a model that connects motivation to learning and diversity training outcomes. The model includes six links:

1. Belief in the utility of diversity training and perceived need for diversity training.
2. Belief that diversity training leads to job rewards and importance of job rewards. (Links 1 and 2 influence attitudes towards diversity training.)
3. Perceived management support of diversity training and motivation to comply with management.

4. Perceived coworker support of diversity training and motivation to comply with coworkers. (Links 3 and 4 influence subjective norms about attending diversity training.)
5. Individual differences will influence motivation.
6. Perceived behavioral control including self-efficacy and a belief that one has the time and resources to invest in diversity training.

Based on the model, Wiethoff proposed several hypotheses for possible testing by other researchers and offered suggestions for data collection and study design such as regular communication about available diversity training programs, the need for such training programs (to create a sense of urgency) and their benefits in order to increase positive attitudes towards diversity training and the motivation to attend; the need to manage power dynamics and the threat and anxiety managers and peers might experience around diversity training programs, causing them to directly or indirectly discourage their subordinates and colleagues from attending the training and/or transferring their learning from the training.

In an extensive review of federal data from 708 organizations coupled with survey data on organizational practices, Kalev et al. (2006) examined the impact of three broad approaches to managing diversity on the demographic composition of senior leaders in an organization. These three approaches represented the most popular diversity interventions: preventing and reducing isolation of underrepresented groups through networking and mentoring, reducing bias through training and feedback, and establishing responsibility for diversity initiatives. These three broad approaches covered seven programs: affirmative action, diversity committees and task forces and diversity managers (under the establishing responsibility approach); diversity training and evaluating managers for diversity impact (under the training and feedback approach), and diversity networking programs and mentoring programs (under the preventing social isolation approach). Kalev et al. (2006) revealed that diversity training/bias reduction programs had little impact on the representation of women and ethnic minorities in organizational management positions. Social isolation programs showed a modest impact on the representation of women and

minorities in management. Establishing responsibility programs had the strongest impact. In addition, the presence of establishing accountability programs increased the impact of the other approaches. The study served as a reminder that general research on organizational change and training transfer of training also hold true in the diversity and inclusion context.

Paluck (2006) issued a call to scholars and practitioners to engage in action research so that diversity training design would integrate theoretical knowledge about what works in intergroup contact and prejudice reduction. Pointing to the limited research on diversity training and the inconclusive evidence from the little research that does exist (with the evidence skewing in the direction of no prejudice reduction occurring from diversity programs), Paluck concurred with other researchers and suggested that more careful design and more rigorous evaluation, not based on self-reported data, would be beneficial to the field. Paluck further examined some of the few studies that existed and the outcomes reported by the researchers. Based on this review, Paluck (2006) suggested that future research should (a) focus on the causal effect of programs, (b) use measures based on unobtrusive, non-self-reported data, and (c) conduct research with relevant populations and contexts.

Kulik and Robertson (2008) critiqued the dearth of research on the outcomes of diversity training, the over-reliance on self-reported data, lack of foci on longitudinal and distal outcomes, and an over assessment of knowledge dimensions of impact to the exclusion of attitudes, and particularly skills. In a study of 53 undergraduate resident assistants, L. Roberson, Kulik, and Pepper (2009) assessed transfer of training and individual and organizational factors impacting transfer including the race/ethnicity of trainees. They hypothesized that non-White trainees would be more motivated to use diversity knowledge and skills and therefore would have greater transfer of training results. They also hypothesized that the stronger the perceived positive consequences for applying diversity and skills and the more situational cues (as measured by the presence of non-White faculty) to remind trainees to apply their skills, the greater the transfer of training would be. The study showed that non-White trainees had higher rates of training transfer than White trainees. They also discovered that skill-based learning was the only type of training correlated

with training transfer. Additionally, they discovered that consequences for diversity behavior (increasing motivation to transfer training) did positively influence training transfer, but situational cues (as measured by the presence of non-White faculty), did not (although situational cues were found to result in higher levels of diversity skill learning). Finally, the researchers discovered that skill learning (which was shown to increase self-efficacy) was more important in an environment with few consequences for diversity behavior than when there were many consequences.

Bezrukova et al. (2012) reviewed 20 years of previous diversity research to determine the state of the field and propose directions for future research. Their review revealed recommendations that supported other calls, including the need for longitudinal and experimental designs and objectives, implicit measures of behavior, rather than self-reported data, and explicit measures. The authors pointed to promising results from the rare studies that looked at the impact of a broad or inclusive content in diversity training as well as training that was one part of an integrated or holistic approach to managing diversity and recommended further explorations of these areas. Furthermore, Kalinoski et al. (2012) recommended a focus on proximal outcomes, such as attitudes, with the hope that that some of these outcomes might eventually impact distal outcomes. They asserted that individuals might have more access to attitudinal impacting information about diversity than to cognitive or skill-based impacting information and suggested that this might be a reason for the weak impact diversity training has on affective outcomes.

Chung (2013) suggested that diversity trainers conduct more thorough individual and organizational analyses to better understand how personal and organizational contextual factors, such as demographic and identity similarity, diversity climate, and awareness of discrimination, affect motivation and readiness to learn. Chung also asserted that diversity training must be part of a larger set of initiatives, and trainers should set up clear goals and emphasize the value of the learning that could take place in these programs. Similarly, Alhejji, Garavan, Carbery, O'Brien, and McGuire (2015) pointed to the need to collect data from both participants and managers in order gain objective as

well as subjective data. They also supported other researchers' calls for more sophisticated data collection and analysis measures, a focus on longitudinal data, a need to include more organizational and business level outcomes of diversity training and a use to include more theoretical perspectives in thinking and design. Furthermore, Lindsey et al. (2015) claimed that "The role of time has been all but ignored in the diversity training literature thus far, with most diversity training evaluations utilizing laboratory studies and cross-sectional designs" (p. 607).

Responding to the aforementioned studies and calls for action, Fujimoto and Härtel (2017) recommended that intentional structural interventions that support the interaction of people across cultural and status differences be applied in a way that optimizes diversity and allows for the showcasing of the talents and abilities of minority members. The researchers proposed an organizational diversity learning framework that would incorporate elements of deliberative dialogue to ensure full participation and voice for minority members. Methods such as randomized sampling, minimizing threat by ensuring people with power to punish are not in the same group, and ensuring clear organizational goals, psychological safety, and effective participation can circumvent some of the major challenges of conventional diversity training (Fujimoto & Härtel, 2017). The promising theory has not been tested through empirical studies, so it remains to be seen if power differences can be suitably navigated to allow full participation and whether this approach does result in more positive outcomes than traditional diversity training programs.

In summary, research on outcomes of diversity training points to positive gains in the cognitive domain, but it produced inconsistent results on behavioral change, especially behavioral change that includes automaticity, and weak results on attitudinal change. Research pointed to a need for longitudinal studies and distal outcome measures, as well as a need for the inclusion of objective measures instead of or in addition to self-reported data. More behavioral and skill-building interventions should be built into training design, as well as emphasis on interventions that access trainees' attitudes and beliefs. Factors that have been shown to impact diversity training outcomes should be taken into consideration in design. These factors include trainer and trainee characteristics, trainee self-efficacy, framing of the training, content of the training (narrow versus broad focus; awareness, attitudinal, or skill-based

paradigm, etc.). Finally, contextual factors, including organizational factors prevalent in the general transfer of training literature, such as rewards, consequences, managerial support, and self-efficacy, have all been shown to support transfer of diversity training.

Intercultural competence and diversity. With its roots in anthropology and its strong base in the Peace Corps and international travel, intercultural communication focuses on the cultural aspects of diversity (Fowler, 2006). While its main hold remains in international relationships, recognition of its value in the United States is increasing (J. M. Bennett & Bennett, 2004). The intercultural field has as its goal the development of intercultural competence, which was defined by Fantini and Tirmizi (2006) as “a complex set of abilities needed to perform effectively and appropriately when interacting with others who are linguistically and culturally different from oneself” (p. 12). Similarly, M. Bennett and Bennett (2004) defined intercultural competence as the ability to communicate effectively in cross-cultural situations and to relate appropriately in a variety of cultural contexts.

Early diversity training efforts were not unique to corporate organizations or a United States-only focus. The military was an early leader in pioneering diversity training efforts, starting with a focus on race relations training as desegregation became their reality (Dansby, Stewart, & Webb, 2001). Companies were also increasingly becoming multinational and beginning to recognize that business across borders was detrimentally affected by a lack of knowledge and understanding of the host culture (Landis, Bennett, & Bennett, 2003). As such, the field of cross-cultural/intercultural relations, which was promoted by Americans returning from the Peace Corps or other overseas experiences, began to slowly find its way from the nonprofit world into business (Landis et al., 2003).

Intercultural training should be viewed as a form of diversity training because the focus of intercultural training is effective relationships among people from different cultural backgrounds (Fowler, 2006). Culture can be defined as patterns of beliefs, behaviors, and values learned and shared among a group of interacting people (M. Bennett, 1998). As such, the culture can involve geographic, ethnic, gender, organizational, or a variety of other dimensions. This perspective overlaps with Gardenswartz and Rowe’s (1994) categorization of diversity. In fact, van

Knippenberg et al. (2004) advocated for doing away with the dimensions of diversity approach and focusing on the impact of difference, regardless of what the difference is.

Interculturalists have emphasized that a key to intercultural competence is moving from ethnocentrism to ethnorelativism (M. Bennett, 1998). Ethnocentrism refers to the tendency to place one's culture at the center of reality and evaluate other cultures through the lens of one's own, often resulting in a sense of the superiority of one's culture (Andersen & Taylor, 2007). Since ethnocentrism is often invisible to the holder of such a paradigm and since it is a deeply embedded "structure of assumptions" (Mezirow, 1997, p. 5), a transformational process is often required to move to an ethnorelative mindset, which involves the understanding that culture is just one of many valid realities and results in a person's ability to shift cognitive frames and behavior, depending on cultural context (M. J. Bennett, 1986; M. J. Bennett & Bennett, 2004).

In her invitation to diversity trainers, veteran interculturalist Fowler (2006) encouraged diversity trainers to take advantage of the greater experience of the intercultural field (Fowler viewed diversity training as emerging in the 1980s, while intercultural training started in the 1950s). While acknowledging the significant overlaps, Fowler applied Ferdman and Brody's (1996) distinction between intercultural communication and diversity training. The focus of intercultural training is largely interpersonal. Diversity training, especially approaches such as anti-racism training, targets personal, interpersonal, and systemic dimensions, with a focus on power and discrimination.

J. M. Bennett and Bennett (2004) encouraged an integrated approach to national and international diversity issues, which allowed for the complexity of these issues to be fully addressed. They discussed, for example, the male refugee from Eastern Europe. This person is male and White, so part of America's historically privileged group. But as an immigrant, and possibly as a person with an accent or for whom English might be a second language, he has to fight stereotypes about his competence, address language barriers, struggle with the adaptation challenges that come from being in a new culture, and learn a new system. J. M. Bennett and Bennett (2004) believed that traditional diversity approaches would underserve this individual and challenge new ways of conceptualizing intercultural

training. Instead of taking a narrow approach, the researchers encouraged trainers and practitioners to pair intercultural concepts such as communication styles with the insights and processes recommended by the development model of intercultural sensitivity (M. J. Bennett, 1993) and to include identity development models and other diversity concepts. J. M. Bennett and Bennett (2004) believed that this integrated, multifaceted approach is what is required to create a true change in cognitive, affective, and behavioral outcomes.

Such training approaches have positive relationships regarding difference with an end result of improved organizational functioning as goals. Fowler (2006) encouraged diversity trainers to incorporate the four areas of intercultural training foci: culture, perception, behavior, and communication. While some diversity practitioners seem open to these, and perceptions are often covered through discussions of stereotypes and unconscious biases, a review of published evaluations of diversity training programs, which provided descriptions of training content and a review of diversity training certification available online, did not reveal content that covered these four areas. As the review of the literature on diversity training and intercultural education in the section has shown, diversity training is not impacting affective and automatic behavioral outcomes to the level hoped for—certainly not enough to justify a significant investment of resources in it. The fields of social psychology and neuroscience provide a potential answer to this problem by examining the nature of prejudice and mental models.

Prejudice, Mental Models, and Unconscious Bias

According to Vedantam (2008), U.S. courts have lamented the fact that long-term prejudices and attitudes as well as institutional processes that create disadvantages and exclusion remain, even as organizations and employees espouse diversity. R. R. Thomas (1991) also believed that compliance efforts were ineffective because they did not address the root causes of bias and inequality. These authors pointed to the need for interventions that access deeply held prejudices.

The fields of sociology and psychology have long been concerned with prejudice, defined by Sritharan and Gawronski (2010) as overt expressions of hostility and negativity, as well as support for discriminatory practices and

segregation of groups. This definition, however, refers to explicit prejudice, sometimes called old fashioned prejudice. As social attitudes have evolved, making overt or explicit prejudice and discrimination publicly unacceptable, researchers have been discouraged by the fact that there has not been a marked decrease in bias complaints (U.S. Equal Employment Opportunity Commission, 2015) or intergroup conflicts (Paluck, 2006; Sears & Henry, 2003).

Additionally, resistance to diversity practices and policies, such as affirmative action in admissions and hiring, continues (Sritharan & Gawronski, 2010). The discrepancy between overt attitudes and continued exclusionary practices and impact has led researchers to explore more subtle forms of prejudice (Pearson, Dovidio, & Gaertner, 2009). The subtle forms include symbolic or modern racism, described by Sears and Henry (2003) as the espousing of four major beliefs: Blacks no longer face much prejudice or discrimination, the failure of Blacks to progress results from their unwillingness to work hard enough, Blacks are demanding too much too fast, and Blacks have gotten more than they deserve. Another subtle form is aversive racism, described by Dovidio and Gaertner (1986) as a support for racial minorities and policies favoring racial equity while harboring implicit negative attitudes towards Blacks. These subtle forms of prejudice have been presented as explanations for the chasm between stated values and continued negative reality. Prejudice is an affective phenomenon that influences behavior. The implicit form of prejudice often occurs beyond or beneath an individual's conscious awareness. Behavior that includes automaticity is influenced by unconscious thinking and processes, including prejudice. Getting to the behavior change that promotes better treatment of minorities and creates an inclusive environment must include either a change in implicit affective paradigms or a management system for mitigating negative implicit process that influence exclusive behavior (Lieberman et al., 2014).

Various models have been presented to explain how implicit and explicit processes function, including Fazio, Jackson, Dunton, and Williams's (1995) MODE model, which posited that when motivation and opportunity are high, individuals are able to consciously insert themselves between the automatic processes that result in a stimulus

being associated with a negative evaluation. Also, the dual attitudes model (Wilson, Lindsey, & Schooler, 2000) asserted that implicit or automatic attitudes are the result of early socialization while explicit attitudes are generated from later learning. These two attitudes live side by side in the mind and are accessed differently. More recent, explicit attitudes require more conscious effort to access them; implicit attitudes are automatic.

A more recent model sought to integrate processes involved with both implicit and explicit processes. Called the associative-propositional model (Gawronski & Bodenhausen, 2006), the authors believed that when individuals make associations between an object or stimulus and an evaluation, they also compare this evaluation to explicit propositions or beliefs that they hold. If the evaluation conflicts with the proposition, the individual has the opportunity to reject the evaluation and act in accordance with proposition. According to Sritharan and Gawronski (2010), both propositional beliefs and the evaluation proposition process can be changed. Diversity training and education have the opportunity to have an impact on both of these processes.

Sritharan and Gawronski (2010) pointed to studies that showed promising results when research on mental models and implicit prejudice was incorporated into diversity education programs. For example, Rudman, Ashmore, and Gary (2001) conducted two quasi-experimental studies to show the impact of a diversity course taught by an African American professor on implicit and explicit prejudice. In the first study, the experimental group took a semester-long course focused on prejudice and conflict taught by an African American male professor, and the control group took a research methods course taught by a White female professor. There were 21 White students in the experimental group and 14 White students in the control group. The course involved journaling and extensive group discussion. The students were administered pre- and posttests of explicit prejudice and implicit prejudice. The students in the experimental group showed decreased measures on both tests at the end of the course. Specifically, students who self-reported strong cognitive gains, such as increased awareness of discrimination and a commitment to improving biased situations, showed reductions in explicit measures of prejudice. Students who self-reported

positive affect, including rating the professor highly or creating friendships without group members, improved in implicit measures (i.e., they showed a reduction in automatic stereotyping).

In the second experiment, which was designed to hone in on the responsible agents of change (i.e., the African American professor and/or the content), added a second control group comprised of students in a non-diversity lecture course taught by the same African American professor. Rudman et al. (2001) asked students in the experimental group to report their feelings of being threatened by Black people and added a measure of stereotyping. The results of Experiment 2 showed a correlation among the affective measures; the students who rated the professor highly were also likely to report out group friendships and fear reduction, with a strong correlation between the friendships and fear reduction. Increases in cognitive awareness were correlated with fear reduction but not with a positive evaluation of the professor or prosocial out-group contact. The students in the additional control group (a lecture course taught by the same African American professor) did not show a reduction in explicit or implicit responses, leading the researchers to conclude that the content and process of the diversity course was critical to foster the openness needed for reduction of prejudice.

In a more recent study, Ehrke et al. (2014) posited that the prejudice of groups would be reduced by focusing on the diversity within superordinate groups of first-year students. The researchers tested two diversity training options with students: (a) two-hour get-to-know-you session that focused on intra-group diversity and (b) a one-day session. The two-hour intervention was part of a welcoming day for first-year students. Design groups and control groups both completed four get-to-know-you activities with identical beginning and ending activities. The design group, however, received two intervening activities. According to the authors, “The two middle activities aimed to enhance perceived diversity of social groups in the diversity condition without explicitly drawing attention to gender [which was the target of the intervention]” (Ehrke et al., 2014, p. 196). These activities included a drawing activity and group competition, with debriefing that explored the impact of particular orientations, socialization, and a discussion of stereotypes.

Pre- and post-test results showed that compared to the control group, the test group exhibited an increase in perceived intra-group diversity and improved feelings towards gender outgroup members. The researchers noted the importance of a positive impact, even though participants were deliberately not informed that they were participating in a diversity training or informed about the goals of the intervention beyond having been informed that they were participating in a getting-to-know-you activity. However, the impact was not sustained beyond the one-month mark, and for reasons the researchers could not ascertain, the control group exhibited increased negative feelings regarding gender.

Similarly, Carnes et al. (2015) explored the impact of diversity education on the implicit biases of faculty towards women. The study was conducted at the University of Wisconsin-Madison. The intervention was a 2.5 hour gender bias habit changing training presented to the faculty of 92 university departments over a two-year period, 2010 to 2012. The randomized, controlled study included 2,290 faculty in 46 experimental departments and 46 control departments, who received the intervention after the results were received and analyzed from the experimental group. Participants were loosely categorized into four broad groups and were matched so that each grouping had an experimental and control group pair. Participants were surveyed two days before the intervention and three days and three months after the intervention.

Faculty participants showed increased awareness of gender bias habits. They also showed an increased motivation to address these biased habits and exhibited a sense of self-efficacy in their ability to do so. These positive gains were maintained after three months. The self-efficacy measure was especially encouraging because of its previous correlation with actual behavior (Combs & Luthans, 2007). The study also found a positive impact of positive mass; when at least 25% of a department attended the training, self-reported actions/behaviors to promote gender equity increased significantly. The authors believed that specific process interventions, especially providing specific, actionable content and asking participants to envision and write down how they could apply these behaviors in their own arenas, were particularly effective because they promoted self-efficacy.

While just beginning to gain ground in diversity and inclusion work outside the psychology arena, unconscious biases and the role they play in prejudicial actions have long occupied social psychology researchers. The most popular of this kind of work is Greenwald and Banaji's (1995) implicit association test, a Harvard-based project. The implicit association test is designed to measure the associations people make based on the mental models they hold (Greenwald & Banaji, 1995). Banaji and Greenwald (2013) asserted that individuals hold many unconscious paradigms that stem from narratives, images, and media reports that they see. These representations are not accessible to people for a variety of reasons, including self-perception and social desirability, but these unconscious paradigms influence actions, resulting in unintentional acts of discrimination. Sue et al. (2007) focused attention on *microaggressions*, daily actions sometimes motivated by these unconscious biases. According to the Sue et al. (2007), microaggressions are "brief and commonplace daily verbal, behavioral, or environmental indignities, whether intentional or unintentional, that communicate hostile, derogatory, or negative . . . slights and insults" (p. 271). These are often subtle, so the recipient feels bad, but it can be difficult to explain exactly why, especially to someone who is not sympathetic to issues of bias. Changing the implicit paradigms that lead to microaggressions and other acts of bias and discrimination against minorities involves bringing some of these unconscious processes to conscious awareness, creating interventions that mitigate bias whether they are conscious or not, and addressing the deeply held negative beliefs and narratives that influence negatively biased behavior. In the intercultural communication arena, this work was described as the need to move from a ethnocentric or exclusive paradigm to an ethnorelative or inclusive mindset or paradigm. Informational learning cannot achieve the desired change; a deeper learning experience is necessary.

Synthesizing perspectives from multiple disciplines, Rook (2013) defined a mental model as "a concentrated, personally constructed, internal conception of external phenomena (historical, existing or projected), or experience, that affects how a person acts" (p. 42). Since mental models have been shown to influence perceptions, interpretations, behavior, and effectiveness (Knight et al., 1999), they should be a critical consideration in diversity

training as changing mental models might be the key to achieving the elusive attitudinal change, and as such they might be the key to changing behavior. As deeply embedded representations of an individual's reality, mental models are not easily changed, and new information is often subsumed into existing mental models (H. H. Johnson, 2008). If most of diversity training content is based on informational content or additive knowledge, it will have limited sustained impact, because mental models will remain unchanged.

Transformative Learning

Our meaning structures are transformed through reflection, defined here as attending the grounds (justification) for one's beliefs. We reflect on the unexamined assumptions of our beliefs when the beliefs are not working well for us or where old ways of thing are no longer functional. We are confronted with a disorienting dilemma, which serves as a trigger for reflection. Reflection involves a critique of assumptions to determine whether the belief, often acquired through cultural assimilation in childhood, remains functional for us as adults. We do this by critically examining its origins, nature and consequences. (Mezirow, 1994, p. 223)

Transformational learning is concerned with a change in a frame of reference. According to H. H. Johnson (2008), "Transformative learning is directed at changing the meaning structure or the mental model itself, rather than adding resources to the models currently in use" (p. 86). The outcome of transformative learning is a new and different way of looking at the environment. Frames of reference naturally limit one's world, as people automatically reject information that does not fit into their existing frames of reference (Cranton, 2002). Once frames of reference are set, they are incredibly enduring and shape an individual's actions. As Cranton (2002) stated, "We expect what has happened in the past to happen again" (p. 65), and "it is easier and safer to maintain habits of mind than to change them" (p. 65). Further, it may take a significant or dramatic event to lead individuals to question their assumptions and beliefs: "Other times, though, it is an incremental process in which we gradually change bits of how we see things, not even realizing a transformation has taken place until afterward" (Cranton, 2002, p. 65).

Mezirow (2000) stated that habits of mind are more enduring than points of view, because points of view have to be consistently reflected upon each time the world does not conform to expectations. As such, points of view can be elaborated, established, or transformed. Beyond the transformation of a point of view lies a transformation of the more established frame of reference (Mezirow, 1997, 2006). Mezirow (2000) also presented a hierarchy of frames of reference and explained that frames of reference are, at their best, differentiating, inclusive, permeable, critically reflective, and integrative of experiences. Mezirow (1997, 2006) asserted that the critical reflection on assumptions is key to transformative learning, and this process can occur in both instrumental learning (learning how to do something) and communicative learning (learning to understand one's and others' purpose, values, feelings, and meaning). In instrumental learning, transformation occurs by reflecting on the assumptions underlying the processes and on the content of the learning. Transformative learning in the communicative arena occurs by critically reflecting on assumptions underlying an individual's and other's thoughts, purpose, feelings, and meaning making.

Stages of transformative learning. Mezirow (2000) proposed 10 stages of transformative learning, which do not necessarily all occur and do not necessarily occur in a sequential fashion or linear fashion. Other scholars have refined these phases. For example, Herber (1998) presented four primary phases, and Cranton (2002) presented seven phases. Table 2 illustrates the similarities and differences among these descriptions.

Table 2. Comparison of Three Theories of the Progression of Transformative Learning

Mezirow's 10 Stages	Herber's 4 Primary Phases	Cranton's 7 Phases
1. A disorienting dilemma.	1. Disorienting dilemmas	1. An activating event that typically exposes a discrepancy between what a person has always assumed to be true and what has just been experienced, heard, or read.
2. Self-examination with feelings of fear, anger, guilt, or shame.	2. Critical reflection	2. Articulating assumptions, that is, recognizing underlying assumptions that have been uncritically assimilated and are largely unconscious.
3. A critical assessment of assumptions.	3. Rational dialogue	3. Critical self-reflection, that is, questioning and examining assumptions in terms of where they came from, the consequences of holding them, and why they are important.

Table 2. Comparison of Three Theories of the Progression of Transformative Learning (continued)

Mezirow's 10 Stages	Herber's 4 Primary Phases	Cranton's 7 Phases
4. Recognition that one's discontent and the process of transformation are shared.	4. Action	4. Being open to alternative viewpoints.
5. Exploration of options for new roles, relationships, and actions.		5. Engaging in discourse, where evidence is weighed, arguments assessed, alternative perspectives explored, and knowledge constructed by consensus.
6. Planning a course of action.		6. Revising assumptions and perspectives to make them more open and better justified.
7. Acquiring knowledge and skills for implementing one's plans.		7. Acting on revisions, behaving, talking, and thinking in a way that is congruent with transformed assumptions or perspectives.
8. Provisional trying of new roles.		
9. Building competence and self-confidence in new roles and relationships.		
10. A reintegration into one's life on the basis of conditions dictated by one's new perspective.		

Criticism of Mezirow's theory. As popular as Mezirow is in the field of adult education, he is not without critics (Newman, 2010). Theorists have strongly criticized what they deemed Mezirow's over emphasis on rationality (Taylor & Snyder, 2012). According to Roberts (2006), disorienting dilemmas can be quite painful and can have adverse emotional effects on learners, including on their performance. The disorientating dilemma, self-examination, and critical reflection phases, therefore, carry potential for high emotion that must be acknowledged.

Other researchers have criticized Mezirow's deemphasizing of power and societal action in his theory

(Brookfield, 2012). This criticism has been especially strong from scholars and practitioners who embrace a critical approach to their work and/or are guided by critical theory and perspectives. From the perspectives of scholars such as Brookfield (2012), the transformational process should be emancipatory (i.e., it should involve challenging the status quo and undoing hegemonic practices and creating equity for the many, rather than the few). In response to these criticisms, Mezirow's theory has evolved, becoming clearer and more explicit, acknowledging the important role of emotions and the role power plays in facilitating or hindering transformation (Baumgartner, 2012; Kitchenham, 2008).

Facilitating transformative learning. In providing suggestions for educators interested in facilitating transformative learning, Mezirow (1997) stated,

Effective discourse depends on how well the educator can create a situation in which those participating have full information; are free from coercion; have equal opportunity to assume the various roles of discourse (to advance beliefs, challenge, defend, explain, assess evidence, and judge arguments); become critically reflective of assumptions; are empathic and open to other perspectives; are willing to listen and to search for common ground or a synthesis of different points of view; and can make a tentative best judgment to guide action. These ideal conditions of discourse are also ideal conditions of adult learning and of education. (p. 10)

Cranton (2002) also prescribed approaches that foster transformation. These include fostering critical reflection, especially through the use of critical incidents; fostering discourse; helping learners recognize and articulate their assumptions; helping learners be open to new and alternative explanations, be willing to revise their assumptions, and engage in actions based on these revised assumptions.

Hindrances to transformative learning. In exploring hindrances to transformative learning, MacKeracher (2012) stated,

I think that a learner can stop an experience that might lead to transformative learning by: [a] remaining unaware of or ignoring the disconfirming experience; [b] not reflecting on such experiences, even denying

that they have occurred; [c] not consciously making sense of the change or force-fitting the change into an old perspective; and [d] not completing the transformation by engaging in actions based on new premises. (p. 350).

Furthermore, McKeracher (2012) shared insights from other researchers, including not engaging in critical reflection, holding someone outside of one's self responsible for the angst created by a disorienting dilemma and finding a community to support that view, and disconfirming the source of the disorienting dilemma or withdrawing from the source of the dilemma. The role of a community in facilitating or hindering transformative learning has also been explored.

Researchers have emphasized the importance of relationships and community in the transformative learning process. For example, Taylor and Snyder (2012) suggested that both social accountability and social acceptance play important roles in the transformative learning process and could be facilitators of transformative learning. Lack of this social recognition or support could therefore hinder or halt transformative learning from occurring. According to Taylor and Snyder (2012), research findings to date raised questions such as “Is a transformation as much a product of individual change as of group acceptance of that change? How do individuals transform within settings that offer little social support or recognition?” (p. 49). This role of others in fostering social responsibility during the transformative learning process has been cited as a potential area for further research.

Transformative learning in diversity spaces. Inclusion and prejudice reduction have always been a part of transformative learning theory and practice. Mezirow's original thinking derived from a study he did with women returning to school (Kitchenham, 2008). While he has been criticized for not more explicitly speaking to power and systemic issues, Mezirow (1997) has always advocated for the reduction of prejudice and ethnocentrism through transformative learning. Transformative learning theory can be applied to the identity development of minorities, and a focus on the transformation of dominant group members is a recent theme in transformative learning theory (Curry-Stevens, 2007).

Racial identity development can be seen as a transformative learning experience. Theories of racial identity were originally developed around Black identity. As described by Tatum (1992) and originally developed by W. E. Cross, Jr., Black identity development theory charts the course of Blacks moving from a phase wherein Blackness has no salience, to a phase wherein a person serves as an ambassador for her or his culture. Black identity development begins with a pre-encounter stage, wherein the Black person has internalized the dominant narrative about racial attitudes with Whites viewed as right and as the norm and Blacks viewed as less than. This paradigm usually remains unexamined until there is an encounter or collection of experiences such as a personal experience with racism or being confronted with the reality of racism in society.

The encounter launches the individual into the immersion/emersion stage, wherein the person experiences an incredible need to learn about Blackness and surround him- or herself with symbols of Blackness. Early periods of this stage might be characterized by anger against Whites as the individual learns about the history and knowledge that they have been denied, but this dissipates as the focus becomes more internal. As individuals evolve, they enter the internalization stage, where they remain rooted in Blackness but are able to form relationships with Whites who value and accept their new self-definition. They also are able to form relationships with other oppressed groups at this stage. Beyond the internalization stage is internalization commitment, where the individual extends her/his personal sense of Blackness into a “plan of action” and a long-term sense of commitment about Blacks as a whole (Tatum, 1992). Tatum (1992) asserted that in Stages 4 and 5, while rooted in a positive sense of racial identity, the individual is able to transcend race.

The parallels between Black identity development (Tatum, 1992) and transformative learning (Mezirow, 1991, 1997, 2000, 2006) are quite obvious. As detailed in Table 3, the pre-encounter stage mirrors the frame of reference that has been developed through acculturation, before it is subjected to critical reflection. The encounter phase mirrors the disorienting dilemma. The self-examination and critical reflection phase mirrors the immersion/emersion phase. The recognition of shared experiences and exploration of new roles mirror the

internalization phase, and the exploration of action, practice, development of competence and confidence and reintegration of a new identity mirror both the latter stages of internalization and internalization commitment. The movement from a pre-encounter stage to internalization commitment stage, therefore, represents a transformative learning experience, as the person who emerges at the end of the experience has a radically difference frame of reference. A person at the internalization commitment stage, will view the world, interpret experiences, and act very differently from a person at the pre-encounter stage. This is the kind of thinking that undergirds this study.

Table 3. Comparing the Stages of Transformative Learning to Black Identity Development

Stages of Transformative Learning Theory	Stages of Black Identity Development Theory
Unexamined frame of reference	Pre-encounter
A disorienting dilemma	Encounter
Self-examination with feelings of fear, anger, guilt, or shame	Immersion/emersion
A critical assessment of assumptions	
Recognition that one's discontent and the process of transformation are shared	Internalization
Exploration of options for new roles, relationships, and actions	
Planning a course of action	Internalization, internalization commitment
Acquiring knowledge and skills for implementing one's plans	
Provisional trying of new roles	
Building competence and self-confidence in new roles and relationships	Internalization-commitment
A reintegration into one's life on the basis of conditions dictated by one's new perspective	

Transformative learning for the “oppressor”. According to Taylor (2010), about a decade ago, a focus on the transformative experiences of adults with societal privilege emerged in the literature on transformative learning. This development held particular significance for diversity training scholars and practitioners because improvement in intergroup relationships, especially the improvement in the treatment of minority group members, was often cited as a goal of diversity training (Anand & Winters, 2008; Bendick et al., 2001; Paluck, 2006). Generally termed *pedagogy of the privileged* and described by Curry-Stevens (2007) as seeking to “transform those with more advantages into allies of those with fewer” (p. 36), the goal of research in this area is to determine what kinds of experiences lead socially dominant group members to recognize their dominance, choose to see inequity, and choose to act to end inequity (Boyd, 2008; van Gorder, 2007). The following studies are illustrative examples of this process.

Van Gorder (2007) explored and extended the work of Paulo Frerie, a strong influence on Mezirow’s transformative learning theory, to provide direction to educators who teach students from privileged backgrounds. Van Gorder warned that most of what passes as interest in the non-privileged is paternalism, unproductive self-centered guilt/remorse, or a savior stance. None of these approaches result in the liberation and humanization of the oppressor or oppressed. Like Frerie (1990) and Mezirow (2000), van Gorder (2007) encouraged critical reflections on assumptions, narratives, and beliefs in order to recognize how so-called normal ways of being and expectations of life (entitlement) actually maintain unjust systems and reinforce disparities between those with privilege and those without it.

Curry-Stevens (2007) interviewed 20 community practitioners involved in transforming the lenses of those who were privileged by virtue of their race, gender, or socioeconomic status to glean insights about what worked in facilitating transformation for the privileged. Descriptions for the facilitators highlighted the need for something akin to a disorienting dilemma. The facilitators also believed that learning and transformation experiences should also include some of the following areas:

- Shifting from individual to collective levels of analysis.
- Developing critical thinking (in terms of how power operates in society).
- Understanding how power works both ideologically and materially to generate.
- Inequality.
- Understanding how ideology is integral in understanding behavior.
- Building policy analysis skills to understand, for example, the ideological underpinnings of various state levers with broad social and political ramifications.
- Building civic virtues such as empathy, interdependence, and a capacity to understand and work across difference (other virtues such as integrity and honesty are largely beyond the realm of such practice but they can be modelled by the educator and thus subtly affirmed).
- Building courage to take action. (Curry-Stevens, 2007, p. 42)

The facilitators hoped for a dual learning on the part of the oppressor and the oppressed that would allow for reconciliation and liberation on both sides, making room for the full humanity of all to emerge. In contrast to Mezirow's (1997) original writings, facilitators centered emotion and psychological processes in transformational experiences for the privileged, informing them of the potentially threatening nature of the exposure of privilege with social dominance and warning them of the fear, anger, and backlash that can be elicited, as well as the excitement and hope that can also result. Based on the themes discovered in the interviews, Curry-Stevens presented a six-step model for facilitating the transformation of the privileged. The six steps are

- Understanding that oppression exists
- Understanding oppression as structural
- Locating oneself as oppressed
- Locating oneself as privileged
- Understanding the benefits of privilege

- Understanding oneself as implicated in the oppression of others and understanding oneself as oppressor.

This model rejected the idea that creating a special pedagogy for the privileged is pandering to their needs, further adjusting to their sense of entitlement and instead followed a developmental notion that allowed for the individuals to grapple with more and more challenging material.

Boyd (2008) applied the principles of mindful learning described by Mezirow (2005) to his own development. Recognizing that his engagement in cross-racial efforts had been mostly intellectual and emotionally distant or based on scripts centered around the cultural performance of Whiteness, Boyd (2008) engaged in auto-ethnography, which involves the exploration of one's own culture and experience to better understand a phenomenon, with a focus on the cultural and societal influences on the experience. In Boyd's (2008) words, "I am exploring my life world to bring to the surface the tacit assumptions I have assimilated from White culture" (p. 217). An experience in a group designed to create cross-racial bridges served as a disorienting dilemma for Boyd, forcing him to personally and emotionally engage with his privileged life and experiences. He mapped his experiences to transformative learning theory, particularly mindful of learning and White racial identity development.

Terwilliger (2010) operationalized van Gorder's (2007) suggestions in her study with 13 pre-service teachers. Her goal was to have students critique their identities and discourse in order to understand how Whiteness invisibly shapes assumptions about right and good and the impact these processes have on minorities if they are criticized. Terwilliger (2010) guided her students through a critical reflection process as they participated in field experiences with migrant children. Through readings on critical theory and perspectives in education, iterative journals, a biographical survey, and the field experiences, students had the opportunity to wrestle with deeply held but unexamined and unchallenged beliefs such as how to teach, what a good student was, and how Whiteness was invisible but always present. The participants' journals showed them passing through the various stages of White

identity development and transformative learning, with many of the students' ending with expanded or different frames of reference. The expectation was that these new lenses would impact their teaching practices.

More recently, Gebert, Buengeler, and Heinitz (2017) acknowledged support for approaches like that of Curry-Stevens (2007), who asserted that a dogmatic stance in diversity training is one of the reasons for its low success. Instead, Gebert et al. (2017) encouraged diversity trainees to foster a tolerance that allows for unpopular and politically incorrect statements to be shared and listened to without judgment. According to these authors, “constructively” dealing with diversity is dealing with diversity in ways that serve the mutual growth of those involved and increase the chance that people will be able to engage in a dialogue—even in the case of opposing values that are highly salient to people’s identities—as a means of preventing conflict (Gebert et al., 2017, p. 418).

As the illustrative examples have shown, the goal for all of these studies and descriptions was a change in behavior arrived at through a change in mental models precipitated by a critical reflection on assumptions that had been previously unexamined or taken for granted as truth. While the language here is familiar to adult education, the thinking, goals, and processes are similar to what social psychologists discussed in relation to prejudice reduction, what intercultural trainers discussed in relation to moving from ethnocentrism to ethnorelativism, and what diversity training scholars and practitioners hope will happen through diversity training.

Transformative learning in the intercultural development context. Taylor (1994) explicitly described intercultural development as a transformative learning experience, described acceptance as the beginning of ethnorelativism, and explained that as ethnorelativism deepens, action and behavior begin to follow cognition. M. J. Bennett (1993) created a stage model of intercultural development that placed individuals on a continuum moving from ethnocentrism to ethnorelativism—an orientation that views culture as one of multiple valid and equal ways of being. The six stages on this continuum are denial, defense, minimization, acceptance, adaptation, and integration. M. J. Bennett’s (1993) model provided clear prescriptions for moving from ethnocentrism to ethnorelativism (see Table 4).

Table 4. Moving from Minimization to Acceptance

Primary developmental task	Develop cultural awareness
Content to support learning	Definitions of culture, race, ethnicity, stereotypes, and generalizations. Culture, perception, and world view. Minor subjective cultural differences, such as nonverbal behavior, or communication styles.
Process to support learners	Avoid excessive stress on cultural contrasts. Expand curiosity about their own culture to other cultures.
Content to challenge learners	Categories and frameworks for understanding their own culture, including values and beliefs. The privilege of dominant groups. Use authentic materials (advertising, media, etc.) from their own culture.
Process to challenge learners	Facilitate contact with ethnorelative resource persons in structured activities. Structure opportunities for difference-seeking. Focus primarily on cultural self-awareness. Use selected and trained ethnorelative resource persons.

Note. From “Towards a Developmental Model of Intercultural Sensitivity,” by M. J. Bennett, 2011, Retrieved from http://www.idrinstitute.org/allegati/IDRI_t_Pubblicazioni/47/FILE_Documento_Bennett_DMIS_12pp_quotes_rev_2011.pdf. Copyright 2011 by M. J. Bennett. Reprinted with permission.

Examining the prescribed process from minimization (the end stage of ethnocentrism in the model), to acceptance (the first stage of the model’s ethnorelative stages) requires content and processes that might be found in a transformative learning experience. Researchers who have examined the model (e.g., Paige, Cohen, Kappler, Chi, & Lassegard, 2002; Pedersen; 2010), especially in the areas of study abroad and cultural immersion, have shown that participants are able to move from ethnocentrism to ethnorelativism following the prescription. Interestingly, in experimental studies, critical reflection on the experience, rather than the experience itself, was revealed to be crucial piece for transformation (Paige et al., 2002; Pedersen, 2010), confirming the importance of reflection to the transformation process.

As the theory of, and research into, transformative learning has evolved, research has become more sophisticated. In multiple comprehensive reviews of research in the field, Taylor (2000, 2007, 2008) found a marked increase in the number of articles and dissertations on transformative learning, greater interest in contextual factors

and the role of relationships in transformative learning, a continued dominance of Mezirow's theory in the field, new (and contested) quantitative tools for studying transformative learning, and new approaches to fostering transformative learning such as action research and the arts.

Kasworm and Bowles (2012) challenged researchers to explore how diverse characteristics of learners may affect or be affected by transformative learning processes. They also called for contextual and environmental factors that facilitate or deter transformation to be explored by encouraging researchers to delve deeper into learners' cognitive and affective entry states, as well as to document the critical point that catalyzes or blocks the participants' transformative learning journey (Kasworm & Bowles, 2012, pp. 400-401). Taylor and Snyder (2012) supported this idea by drawing attention to the fact that few previous studies have explored whether factors from the participants' background, culture, or positionality impacted their transformative learning experiences (p. 40). Finally, researchers and practitioners were charged to explore the impact of the transformative learning experience, particularly the participants' more complex worldviews and the individual or collective actions in which they engage (Kasworm & Bowles, 2012, pp. 400-401). Kreber (2012) called for "more detailed analyses" (p. 333) of what happens in discussions that presumably foster critical reflection. These recommendations deeply impacted the thinking around this study.

Summary of the Chapter

The literature reviewed in this chapter explored diversity and inclusion, established the business case for diversity and inclusion, and introduced and examined the design factors of diversity training and education, along with outcomes and transfer issues. It has also examined intercultural development, prejudice, unconscious bias, mental models, and transformative learning.

In order to integrate this multi-disciplinary thinking, the changing workplace requires organizations and human resource development professionals to develop competence in motivating, developing, and fostering a welcoming and empowering context for individuals from a variety of cultural and identity backgrounds. Current

diversity research points to the need for more research to determine the contextual factors that influence effectiveness and positive outcomes of diversity training (Anand & Winters, 2008; Bell & Kravitz, 2008; Esen, 2005; Guillaume, Dawson, Woods, Sacramento, & West, 2013; Theodorakopoulos & Budhwar, 2015) as well as a need to improve diversity training so that it has a greater impact on affective and behavioral dimensions, as these dimensions have the most direct impact on the treatment of minorities, the most commonly cited goal of diversity training (Paluck, 2006). The approach to the affective and behavioral outcomes should target mental models, particularly prejudice and implicit processes that influence automatic behavior and unintentional acts of discrimination (Paluck & Green, 2009; Sritharan & Gawronski, 2010).

Organizations and practitioners have begun to show signs of heeding scholars' recommendations as evidenced by Google's (Brock, 2014) recent revelation that a majority of its employees had undergone training on unconscious biases (J. C. Williams, 2014). Conceptual conversations like these and an increasing focus on microaggression in the workplace bring the cognitive and affective elements to organizational diversity training, while an increased use of scenario, role playing, and other behavior modelling techniques bring a focus on skill development to diversity education programs (Kulik & Roberson, 2008). However, a strong need to blend diversity training and education in a way that creates a sustained impact and affects behavior outcomes remains (Bell & Kravitz, 2008; Kulik & Roberson, 2008). Scholars also pointed to a strong need to understand the antecedents of diversity training and previously held beliefs about diversity on the outcomes of diversity training programs (Alhejji et al., 2015).

Transformative learning, social psychology, neuroscience, and intercultural education provide prescriptions for content and processes that can create this desired and sustained change, even as transformative learning scholars and practitioners call for a greater understanding of the transformation process and the antecedents and contextual facilitators of transformation. However, a transformative learning design has not been incorporated enough into workplace training programs (H. H. Johnson, 2008). Diversity training and education can also be strengthened by

incorporating the best of both traditions, including concepts, needs assessment, evaluation, and skill building. J. M. Bennett and Bennett (2004) supported this proposition with their suggestion that diversity training can be enhanced and its impact can be increased by integrating concepts both from traditional and intercultural diversity training.

Consequently, across disparate strands of research, practice, and disciplines are calls for diversity training design that impacts attitudinal prejudices and behavior (Alhejji et al., 2015). Recommendations for achieving this goal include integrating the best of diversity training and education components and focusing on contextual factors such as participant characteristics, program length, and content, which Kulik and Roberson (2008) stated are “rarely the direct target of diversity education research” (p. 3), resulting in little knowledge about how these factors impact diversity training effectiveness. Recommendations also included using an intentional transformational learning design that follows recommendations for moving participants from ethnocentrism to ethnorelativism (M. J. Bennett, 1993). Such approaches hold promise as viable avenues to achieving a change in bias and in behavior (Pedersen, 2010; Sritharan & Gawronski, 2010; Taylor, 2004). In the human resource development and adult education fields, scholars have called for increased research into understanding the process of transformation, especially the critical reflection process and the role of the community in facilitating transformation. Within the higher education context, Kasworm and Bowles (2010) stated that

Transformative learning theory provides an important frame for the development of innovative professional development programs. These programs incorporate strategies for faculty and administrators to experience “disorienting dilemmas” of perspective and practice; of structured critically reflective exercises; to engage individuals in new and unique sets of knowledge and skills for teaching, research, or service; and often encouraging individuals to view themselves as emulating the transformative learning process and related strategies in their own worlds. (p. 398)

Accordingly, Bezrukova et al. (2012) asserted,

The increasing demand for diversity training due to major societal and organizational trends (e.g., changing workforce demographics, firms' globalization, and continuing legal challenges) calls for better understanding of what type of programs can make a difference in how we research and teach about diversity. (p. 15)

More recently, Bezrukova et al. (2016) affirmed the cause for concern. Their meta-analytic analysis of over 260 studies across a 40-year period featured research that employed a variety of methods, target interventions, and impact over time. Results revealed, again, that diversity training primarily impacted cognitive learning, with less impact on behavioral and attitudinal domains. Furthermore, the gains in the latter area tended to dwindle over time while cognitive learning was more likely to hold steady (Bezrukova et al., 2016). Therefore, as Moss-Racusin et al. (2014) indicated, "Research aimed at identifying why successful diversity interventions work will be particularly important for designing new programs tailored to specific audiences, outcomes, and institutional contexts" (p. 2). This study sought to address the articulated shortcomings in the existing literature by specifically examining a non-traditional diversity training program within a higher education context that integrates a transformational design and incorporates traditional and intercultural diversity training concepts.

Chapter 3

Design and Methods

Introduction

This chapter presents the purpose of the study and the research questions that guided this study. It then provides an overview of the pilot interviews that ensured that the interview protocol for data collection and data analysis approaches were feasible to the purpose of the study and an explanation of how the pilot interviews influenced the main study design. It then discusses the design of the main study and the research setting, articulates the role of the researcher and describes the approaches to data collection and analysis. It addresses issues of rigor and robustness related to the study. It acknowledges the limitations associated with the study and then concludes with a summary of the chapter.

Purpose of the Study

The purpose of this study was to understand the transformational learning experiences that may have occurred in a non-traditional diversity training program, along with potential antecedents, outcomes, and program design considerations.

Research Questions

The research questions that guided the study were:

1. What was the experience of transformational learning for participants in the Non-traditional Diversity Training Program?
2. What influenced participants' transformational learning experiences?
3. How did participants' transformational learning experiences impact their behavior?
4. What aspects of the program contributed to participants' transformational learning?

Overview and Influence of the Pilot Interviews on Main Study Design

According to Yin (2013), a pilot study can help researchers to improve their approach to data collection as well as the questions addressed in a study. Pilot studies help provide insights on the viability of the interview protocol and the procedures for collecting data, as well as refine thinking about the concepts under review (Yin, 2013). A pilot study consisting of two qualitative interviews was conducted in the Fall of 2015 to carefully assess the feasibility of the design of the study, including the approach to participant selection, the appropriateness of the questions developed for the interview protocol, and planned approaches for data analysis.

Additionally, the pilot study presented an opportunity for the researcher to further develop and hone her interviewing skills. The pilot study was conducted under the supervision of the researcher's dissertation chair, Dr. Andrea D. Ellinger, and methodologist, Dr. Rochell McWhorter. The researcher applied for and received approval from the Institutional Review Board (IRB) at The University of Texas at Tyler before conducting the pilot study. The IRB application and approval for the study appear in Appendixes A and B.

Two participants were purposefully selected based on a review of the final journals that they had submitted as part of their participation in the non-traditional diversity training program. The participants granted verbal permission before journal analysis occurred. These two participants were selected because analysis of their journals revealed that they had engaged in deep critical reflection and exhibited evidence of new ways of thinking and acting after the program, suggesting the possibility that transformative learning had occurred. Relevant excerpts from the journals appear in Appendix D. Two participants—one a female faculty member and academic administrator and one a male staff member—provided interviews for a pilot study. Both participants were racially White, with one participant being ethnically Greek and the other being ethnically Latino. Semi-structured interviews were conducted in a face-to-face format. Participants received the questions and consent form a week before the scheduled interview to allow them time to gather their thoughts. Interviews were approximately an hour in length and were digitally

recorded. The interviews were transcribed verbatim and compared with the field notes taken during the interviews. The researcher began the process of coding using a theory-based deductive approach.

Issues associated with validity and reliability were addressed through member checks, wherein participants verified the accuracy of their transcripts. Additionally, the dissertation chair and methodologist reviewed the coding to validate the researcher's initial analysis. Finally, the researcher asked follow-up questions by e-mail exchange after analysis of the transcripts revealed opportunities for the researcher to dig deeper into aspects of the program and the impact it had on the participants. This precaution prevented the researcher from making assumptions.

The pilot study was a powerful learning experience that impacted several aspects of the main study. Specifically, some of the interview questions were amended for the study, and additional questions were formulated to further expand the interview protocol. A review of the transcripts also revealed a tendency for the researcher to go off script and speak too much, as opposed to being an active listener. Therefore, the researcher developed an interview preface script that acknowledged this tendency. The interviews were originally analyzed using a theory-based deduction coding method. However, after review, the chair and methodologist suggested that an open coding approach be employed to ensure that critical interview data was not overlooked. Thus, the pilot study impacted the way the transcripts were analyzed; the researcher used an open coding approach as the dominant approach in future interviews, with the theory-driven coding method as a secondary approach.

While it was premature to develop themes from the data that has emerged from a pilot study consisting of two participants, some preliminary findings and similarities across interviews were evident. These are presented below:

1. Both participants reflected upon experiences from their pasts, which primed them to have a transformative experience. For Participant 1 [P1], it was primarily an external event, supported by personal experiences. For Participant 2 [P2], it was a personal event.

2. Both of the participants were incredibly self-reflective and meta-cognitive. Emotions also played a powerful role in their learning experiences: passion and anger at injustice for P1 and shame for P2.
3. Both of the participants had experiences in the program that caught their attention and opened them up to learning. For P1, it was being presented with the idea that she was privileged, and for P2, it was being confronted with assumptions that he often made about individuals who differed from him.
4. P1 could directly point to action steps taken, while P2 could not. Yet, early in the interview, P2 discussed what he is doing with his kids to try to have an impact, suggesting some evidence of action. The reflection on such actions not being articulated later in the interview could explain this discrepancy. P1's work role also provided more context for "palpable action" than P2's, which may also account for this difference.
5. When compared against the development model of intercultural sensitivity, P2 reflected classic elements of the acceptance stage (Stage 4), struggling to move from awareness to action. P1 could point to specific actions taken as a result of her new paradigm.
6. As prescribed by the developmental model of intercultural sensitivity, the reflection on the privilege of dominant groups provided powerful learning for both of the participants, providing the disorienting dilemma described in transformative learning theory as a crucial step in the transformative learning journey.
7. The length of the program appears to have been influential in facilitating the participants' learning. P1 referred to being angry for the first three weeks but was able to move past such emotions because the program continued past those three weeks. The extended nature of the program allowed P2 the opportunity to engage in the deep learning and reflection he desired.
8. While neither of the participants directly mentioned having community with the other participants in the program, both participants appear to have found a safe space to reflect in the program.

Design of the Main Study

The study employed a qualitative phenomenological embedded case study design. According to Merriam and Kim (2012), the type of question a researcher is trying to answer drives the selection of design and method. “How” and “why” questions that focus on deep understanding and meaning making are best addressed by a qualitative research design. Merriam (2009) stated that qualitative researchers are interested in the “meaning a phenomenon has for those involved” (p. 22). Further, Merriam (2009) stated that basic qualitative research is concerned with self-interpretation of experiences, constructions of reality, and meaning making, with the research conducted in order to understand this meaning making. This case study was concerned with the process of transformation that may have occurred during or as a result of a transformative learning process for participants who had been involved in a Non-traditional Diversity Training Program. This focus on deep understanding and meaning of the participants’ experiences as embedded in the program, the case, required a qualitative phenomenological embedded case study approach.

The epistemological paradigm that governs qualitative research, and thus governed this study, is interpretivist. The interpretivist tradition is focused on subjective, rather than objective, phenomena and has been advanced as a more appropriate approach to the social sciences and the study of people (Bryman & Bell, 2008). A constructivist paradigm also governed this study. Sometimes used interchangeably or simultaneously with an interpretivist paradigm, constructivism sees the individual as the agent of reality creation (Bryman & Bell, 2008; Merriam, 2009). This study was primarily concerned with the meaning-making process and changes that occur in the meaning-making process of the selected participants. Rather than an objective reality, the focus was on reality as defined and redefined by individuals. This concern with meaning making, meaning perspectives, and changes in these perspectives, made the constructivist paradigm the appropriate governing philosophy for such a study.

Merriam (2009) defined case study as “an in depth description and analysis of a bounded system” (p. 40). Cronin (2014) stated that “The goal of CSR [Case Study Research] is to create as accurate and as complete as

possible a description of the case” (p. 22). Case studies are viewed as useful when the goal is to understand and explain a complex situation or event involving many variables (Al Rubaie, 2002; Bromley, 1990; Yin, 2009, 2014). While the philosophy of phenomenology informs all qualitative research, Merriam (2009) presented phenomenology as a type of qualitative research in and of itself. This kind of research is concerned with “the experience itself and how experiencing something is transformed into consciousness” (Merriam, 2009, p. 24). Hermeneutical phenomenology is focused on interpreting and not just describing (T. Roberts, 2013), a process central to interpretative phenomenological analysis (IPA). Larkin, Watts, and Clifton (2006) described IPA as having a dual focus on giving voice (allowing participants to share their experiences) and by making meaning (sense making by the researcher). As such, IPA is well suited to research projects that have the researcher as an actor, defined as a “key player in the research—possibly introducing a new technique or procedure” (Scapens, 2004, p. 264).

Research Setting: Selection of the Non-Traditional Diversity Training Program

Taylor and Synder (2012) discussed the importance of considering the “individual in a particular context” (p. 45), rather than taking a one-size-fits-all approach. Merriam and Kim (2012) supported this assertion of the philosophy of qualitative research as they stated that studying phenomena in context is required for understanding. This case study sought to understand and make sense of participants’ experiences in a non-traditional diversity training program and to examine the impact the experience had on their mental models and actions. Previous researchers pointed to the need to better understand what works in diversity training and education, the need to better facilitate diversity training so that it impacts mental models and behavior, and the need for faculty and staff to develop the skills necessary to create an inclusive environment and develop intercultural competence in students (Valdez, 2002). In addition, Forte and Blouin (2016) pointed to the trend in higher education to create experiences that develop the right habits of mind in students so they can better understand and engage with the world. Therefore, a diversity program that integrated training and education approaches to facilitate and foster potential changes in

mental models in a higher education institution was a suitable and important environment in which to investigate these processes.

The Program. The Non-traditional Diversity Training Program was an in-house diversity certification program housed at a small, private college in the Northeastern United States. The college has 2,000 traditional undergraduate students and about 340 full-time employees with a faculty that is 38% female and 10% people of color. While no official numbers are available, the college has a critical mass of LGBTQ employees. The gender distribution of the staff mirrors that of the faculty with 65% of staff being female; 9% of staff are also people of color. The campus in some ways can be effectively split by tenure—those who have been at the college longer than 10 years and those who have joined the college in the last five years.

The goal of the diversity program was to reduce resistance to diversity and create a community of diversity champions prepared to work for an inclusive campus. The program is voluntary and open to faculty, staff, and administrators of the college. It enjoys strong word of mouth, senior leadership role modeling (through attendance), and the encouragement and attendance of members of management. One hundred and forty-five participants over seven cohorts, including vice presidents, deans, directors, faculty, staff, and support staff have completed the program over the course of four years, starting in 2011. At the time of this dissertation, 85 of these graduates were still employed at the college. The program's content consists of 25 hours of personal, cultural, and societal diversity-related topics, delivered in a combination of two-hour sessions and full day intensives. The program's curriculum and approach were strongly informed by transformative learning theory and the developmental model of intercultural sensitivity. The program content is as follows:

1. Introduction and group norms
2. Foundational session: Diversity 101
3. Culture and America as a cultural entity
4. Communication and conflict styles
5. Micro aggressions, triggers, and emotional intelligence

6. Positionality, identity, and privilege
7. Patterns of dominant group behavior
8. Patterns of non-dominant group behavior
9. Scenarios and behavior modeling
10. A deep dive on race
11. Theories of change
12. What does this mean here?
13. What world do we want to create? What will we do?

The program employs a variety of teaching methods, including videos, lecturettes, exercises, small group discussions and presentations, readings, and journaling. Cohorts 5 through 7 engaged in an “other” cultural experience, wherein they placed themselves in culturally unfamiliar situations so they could experience being the “other” or the “minority.” Research has shown that these experiences facilitate transformation for diversity (Doucet, Grayman-Simpson, & Shapses Wertheim, 2013). Cohorts 4 through 7 also responded to scenarios. Cohorts 2, 3, 5 and 6 engaged in a campus impact project. All cohorts planned a graduation ceremony to which senior leadership was invited.

Length. At 25 hours long, with 18 hours required to graduate, the length of time invested in the program is longer than the average diversity training program, which ranges from four to 10 hours (Bendick et al., 2001). Intercultural research has pointed to intercultural development gains of one standard orientation after 30 contact hours of training, so the cumulative amount of time spent in sessions, readings, and the other cultural activities were designed to target the 30-hour threshold required for transformation (Hammer, 2012).

Content and delivery methods. The length of the program allows for the content to include both a broad emphasis on multiple differences and a narrow focus on race, incorporating both research showing that participants favor a broad diversity focus and affective outcomes and researcher showing stronger gains from a narrow diversity focus (Holladay et al., 2003; Paluck & Green, 2009). The program’s content includes intercultural educational material and prejudice reduction (psychology) content, as well as diversity training and diversity educational

components that focus on cognitive, affective, and behavioral needs, and the program includes an assessment of the participants' intercultural development, including behavioral modeling activities such as scenarios that develop both conceptual and practical skill development (Combs & Luthans, 2007; King et al., 2010; Kulik & Roberson, 2008).

Multiple entry points. While this was not a longitudinal study, seven cohorts of participants have completed the program over the course of four years. The first cohort completed the program in 2011; therefore, participants who have had some time and distance from the program can present a view of the sustained impact of the program. As the program has matured and feedback from participants has influenced design, the program has incorporated different aspects of a more or less a particular approach, so this case study allowed various approaches to be explored, as various studies have illustrated the utility of a variety of methods, especially interactive methods and methods that encourage reflection (Bezrukova et al., 2012).

Participant selection. Participants for this study were selected on the basis of journal entries they completed during their participation in the program. This method reflected a purposeful (intensity) sampling approach, as participants were selected based on the expectation that the most information could be gleaned from them (Merriam, 2009; Patton, 2001). The use of self-reported data, including journals, is considered an appropriate method in transformative learning research and is compatible with the transformative learning philosophy of emancipatory learning (Cranton & Hoggan, 2012). All non-traditional diversity program participants were invited to complete at least one journal during the course of the program. Approval was requested from participants to review their journals for research purposes. Journals submitted for consideration in this study were used to identify potential participants. The journals were analyzed to determine if participants expressed sentiments consistent with transformative learning, such as a paradigm expansion, experience of a disorienting dilemma, metacognition, premise reflection, or other forms of critical reflection. The researcher was essentially looking for evidence of reflection of growth and expressions of altered beliefs or attitudes (Taylor & Snyder, 2012). The researcher kept in mind the admonition to focus not on what was said, but rather, on how it was said to find evidence of transformation (Cranton & Hoggan,

2012). The intention was that at least one participant from each of the seven cohorts who completed the program would be selected to participate in the study, with a plan of continuing interviews until reaching data saturation or redundancy, keeping in mind that researchers have explained that the saturation point often occurs around Participant 8, and the recommended number of participants for interpretative phenomenological analysis is three, but not being limited by this information (Bryman & Bell, 2008; Merriam, 2009; Smith & Osborn, 2003).

Role of the Researcher

As the creator and facilitator of the non-traditional diversity training program, it was incredibly important to critically examine, understand, and clarify my own position as a diversity practitioner, as a researcher, and as a person with my own lens, biases, and perspectives. I had to acknowledge and account for the fact that my lens would influence what I heard and attended to and how I interpreted that information. My social location or positionality was informed by personal experiences and as such, my biography and diversity journey, especially with regards to transformative learning experiences was important.

I remember the shock and pain of learning that as a Nigerian, my middle class upbringing had shielded me from the reality of poverty in my country and allowed me to collude with the systems in ways that dehumanized, discounted, and minimized the poor. The realization that my comfort had been facilitated by the disadvantaging of many was a painful surprise and could certainly be described as a disorienting dilemma. I was forced to critically analyze the notions of fairness, justice, and meritocracy. Similar experiences occurred when I discovered, as a junior in college, that women made seventy-five cents on the dollar that men made and as a graduate student, when I went into inner city high schools in Detroit and Ypsilanti, Michigan, and I discovered that students had to contend with violence, both inside the school and on their way there. At each of these junctures, my fundamental assumptions about the way the world worked were challenged, and I emerged with a dramatically different frame of reference. It was the combination of these transformative learning experiences that not only created my diversity worldview but also created my commitment to becoming an agent of change for inclusion and led to my current career. These

experiences influenced how I interacted with the data and the themes I discovered. Interpretative phenomenological analysis assumes that the researcher is not a neutral participant and the data is not objective (Smith & Osborn, 2003). My knowledge of the field guarantees that I not a neutral party, but rather an actor in this study because I designed the program and facilitated it.

Approaches to Data Collection

Data was collected through phenomenological interviews with program participants who completed the program. The original plan was to conduct third party or confirmatory interviews with supervisors, coworkers, and/or family members who had an opportunity to observe the participants' behaviors and could provide insights about such behaviors. However, this did not prove feasible, as participants were reluctant to provide names of third party interviewers. In light of social desirability, especially people's reluctance to appear biased or bigoted, this reluctance makes sense. Confirmatory information was provided through readily available, objective data such as publicly available blogs and course syllabi. Some of the actions participants have taken and referenced in their interviews were also publicly witnessed activities.

Interviews are the basic data collection method in phenomenological research (Merriam, 2009). According to Merriam (2009), phenomenological interviews are concerned with discovering the essence of one's lived experience and thus focus on deep sense making. Seidman (2006) stated that "recounting narratives of experience has been the major way throughout recorded history that humans have made sense of their experience" (p. 8). . Additionally, Merriam (2009) stated that a qualitative study is "emergent" (p. 169), and the discoveries that emerge guide the study as data is collected and analyzed. As such, a semi-structured interview format was ideal because it allowed the researcher to be flexible, to delve further into interesting or important areas that came up, and to respond to the interviewees' needs (Smith & Osborn, 2003). The goal of this study was to understand the participants' experiences, and collecting their narratives was an important way to do this. Merriam (2009) described interviews as

an excellent technique to use when “conducting intensive case studies of a few selected individuals” (Merriam, 2009, p. 92). Cranton and Hoggan (2012) stated,

Interviews are frequently used for evaluating transformative learning. Interviews can focus on the learner's story of a particular experience to gain insight into the processes or outcomes of the learning, as well as to track learners’ perspective changes or developmental progression over time. (p. 524)

The semi-structured nature of the interviews in this study left room for flexibility to explore relevant content in the interview and allowed for an emergent design. The interview questions were designed to elicit information about the participants' life histories and experiences prior to, during, and after their experience in the training program, as well as to understand how the program impacted their thinking, attitudes and behaviors and what roles the content, process and participants of the program played in their learning. Cranton and Hoggan (2012) believed that observation is an appropriate measure of transformative learning in certain contexts, including diversity, especially when behavioral change is a desired outcome of the learning. They stated that “if someone who previously showed little tolerance of diversity, for example, now demonstrates inclusive behaviors, it could be concluded that a shift in perspective has occurred for that person” (Cranton & Hoggan, 2012, p. 522). As previously stated, the publicly witness actions and artifacts provided an avenue for observation and an opportunity to objectively validate the information provided during the interview.

Data Collection Procedures

All participants who agreed to the interviews provided written consent. The face-to-face interviews lasted about an hour. Interviews were audiotaped for later analysis. Once a participant responded affirmatively to the e-mail invitation to participate, the Primary researcher offered multiple time slots for interviews from which the participant could choose. Once the agreed on an interview time was agreed upon, participants received via e-mail the informed consent form and a general list of questions/areas to be covered a week ahead of the interview. The primary researcher reminded participants in writing and again at the start of the interview that they were free to stop the

interview at any time and for any reason. After the interview was completed and transcribed, participants received a copy of the transcript to review or correct any of the information in the interview; in addition, the primary researcher asked if the interviewee desired that some or the entire interview not be publicly disseminated (Merriam, 2009).

Efforts were taken to ensure minimal risk to the participants, including the following: Data was not and will not be shared with the participants' employers, and only a summary of themes from the totality of the masked data and quotes and descriptions will ever be shared through dissertation, publication, or conference venues. No participant names or other identifiable characteristics will be used in publication/conference papers. A summary of the data was shared with participants at the conclusion of the study. Further, the audio recordings were saved on a password-protected computer and analysis documents remained in the possession of the researcher and were locked in a file drawer in her home office.

Demographic profiles and pseudonyms:

Interview 1: Delia, a White, Western European Heritage American Woman in middle age.

Interview 2: Joseph: White, ethnically non dominant, man in his 40s.

Interview 3: Matthew: White male in his early 30s.

Interview 4: Gabriel: White male in his mid-30s.

Interview 5: Esther: White female in her 50s.

Interview 6: Tom: White male in his late 50s.

Interview 7: Katie, White, multiracial and ethnic female in her mid-30s.

Interview 8: Margie: White female in her early 50s.

Interview 9: Sophia: White female in her mid-30s.

Interview 10: Stella: White female in her 50s.

A total of six women and four men were interviewed. The participants ranged in age from their mid-30s to their late 50s.

Approaches to Data Analysis

The principles of interpretative phenomenological analysis (IPA) governed the analysis of the interview data. According to Smith and Osborn (2007), IPA is concerned with “a detailed examination of the participant’s life-world” and with “the participant’s subjective perception of an event through the exploration of personal experience” (p. 53). As a researcher using IPA, I was very aware of my social location and potential biases in the analysis process; yet I depended on these sets of knowledge to make sense of what the participants were thinking and feeling both by trying to step into the participants’ positions and perspectives and by critically examining personal accounts to determine what was missing and what the story teller was trying to get across and why (Doucet et al., 2013; Smith & Osborn, 2007). I kept in mind Cranton and Hoggan’s (2012) reminder of Mezirow’s (1991) admonition to focus on the process and not the outcomes because transformation cannot be pre-determined, only facilitated.

The first step of analysis was examination of verbatim transcripts made from audiotaped interviews via a detailed line-by-line reading; the next step was open coding, followed by coding informed by theory. Examination of these codes allowed for the emergence of themes. According to Merriam’s (2009) suggestion, analysis was a continuous process, so preliminary notes and themes could be generated after the transcription of each interview (Merriam, 2009, pp. 170-171). The goal of the phenomenological interview was to distill “the essence or basic underlying structure of the meaning of” (Merriam, 2009, p. 25) the transformative experience that occurred during non-traditional diversity training program. Therefore, experiences of different individuals were coded and compared to identify common and divergent themes and to distill the essence of the experience.

IPA holds that analysis is by nature interpretive (Smith & Osborn, 2007). As suggested by Smith and Osborn, the researcher read the transcribed interviews multiple times in order to become intimately familiar with the account and to discover new insights on each reading. Then, in the first stage (coding), the researcher recorded initial comments and associations, with the second reading focused on identifying themes using the theory-related material approach described by Ryan and Bernard (2008) and operationalized by Doucet et al. (2013). This method allowed

the researcher to code pre-defined phases or experiences of the potential transformative learning process and identify themes in the interviews that correspond to these phases or experiences. The researcher then connected or clustered the themes. Insights from previously analyzed interviews can inform the later analyses, or each interview can be analyzed independently and then connected (Smith & Osborn, 2007). The last step involved analyzing a superordinate set of themes and writing them up along with a discussion section.

Validity and Reliability in the Qualitative Tradition

According to Merriam (2009), the questions of reliability and validity in qualitative research differ from those in quantitative research and are primarily concerned with the investigation's being conducted in an ethical manner and with careful attention to study design and data collection and analysis. Reliability in qualitative research is not concerned with having results that other researchers can replicate but rather with establishing consistency between the results and the data (Merriam, 2009). Having participants confirm the verbatim transcripts of their interviews (member checks), having the researcher's dissertation chair and methodologist validate the coding, and using codes found in the theory-based research were ways to ensure reliability in this study. An additional approach to ensure reliability is what Merriam (2009) called an audit trail. This audit trail or interview protocol created a clear map of how the researcher arrived at conclusions. A diary, journal, or log of processes was therefore an essential tool for ensuring reliability.

Summarizing the work of several scholars who wrote about internal validity or credibility, Merriam (2009) stated that in qualitative research, the assumption is that rather than being a fixed or objective entity, reality is fluid, multidimensional, and holistic (p. 215). As such, internal validity encompasses the credibility of the conclusions based on the descriptions presented. In order to increase this credibility, Merriam recommended Denzin's (1978) popular method of triangulation, which can occur using multiple methods, multiple sources of data, multiple investigators, or multiple theories to arrive at a conclusion. This study involved the use of multiple sources of data, both in terms of multiple interviewees from one organization and in terms of self-reported and other-reported

interviews. These different participants and agents expressed different perceptions of the change process, providing opportunities to arrive a rich and full conclusion. Additionally, as described in the protocol section, member checks—the presentation of preliminary data to interviewees to confirm that that the researcher’s interpretation rings true for them—was another ways to ensure internal validity.

External validity, which in qualitative research is concerned with transferability rather than generalizability, was achieved through “thick, rich descriptions,” or “a description of the setting and participants of the study, as well as a detailed description of the findings with adequate evidence presented in the form of quotes from participant interviews, field notes and documents” (Merriam, 2009. p. 227). Additionally, the variation in the interviews from different cohorts and including the perspectives of participants supported external validity.

Limitations

This study, like any other research study, had limitations associated with it. The sample was comprised of 10 participants who were racially White, although several non-dominant ethnicities were represented. While these participants reflected the demographics of the institution and state, racial homogeneity was a limitation of this study, along with the modest sample size. Further, the focus on the individual level without adequate recognition of organizational factors that can facilitate or limit transfer of learning was a limitation of this study. Limitations also included a reliance primarily on self-reported data rather than more objective measures and a reliance on participants’ memories rather than conducting interviews when participants were actively participating in the program. Another limitation was that this was a research study conducted at a moment in time, rather than a true longitudinal study, which could capture behavioral change over time. Another limitation was the absence of extensive pre- and posttest information. Finally, researcher bias, which has been extensively explored in this chapter, and the limited generalizability of a case study were also limitations. However, the goal of a case study is not to provide generalizable results, but rather to elicit deep understanding of a particular case and phenomenon.

Summary of the Chapter

This chapter presented the purpose of the study, research questions that guided the study, and an overview of the influence of the pilot interviews on the main study design. The main study design, the research setting, and the role of the researcher were discussed. Approaches to data collection and analysis were provided along with an articulation of how validity and reliability with the qualitative tradition were addressed. Lastly, the limitations associated with the study were discussed. Chapter 4 will present portraits of the ten participants who were interviewed as part of the study.

Chapter 4

Portraits of the Participants

Introduction

This chapter presents the portraits of the 10 participants in this study. Each portrait includes an articulation of their abbreviated backgrounds, previous experience with difference prior to their participation in the Non-traditional Diversity Training Program, their reasons for participating in the voluntary program, along with their potentially transformative experiences during the program. Tables will depict the participants' potentially transformative learning experiences relative to Mezirow's (1997) transformational learning theory and Bennett's (1993) developmental model of intercultural sensitivity. Pseudonyms have been used in place of the participants' names, along with those of other individuals featuring in their portraits. The text has also been adjusted to obscure other potentially sensitive identifying information.

Interview 1: Delia

Delia is a middle-aged White woman. Her demeanor is one of passion, and she exudes authenticity. Her voice frequently rises as she explores topics she cares deeply about, and her hands are a supporting cast member in the conversation. Delia is committed to being a person driven by values. She is a seasoned academic administrator who has taught in high school and community college, and she is particularly drawn to the mission of community colleges to provide access to education. Because of her early work with non-traditional populations, such as single mothers trying to get off state aid, Delia developed a passion for access and a desire to serve. This desire drove her to obtain an advanced educational degree so that she could move into academic administration and impact change. Her graduate work in the liberal arts and education exposed her to learning about issues of diversity, equity, critical thought, and access and began to open to her eyes to systems that create disparities.

Maybe it is not a conspiracy, but there is a reason why we are all who we are and why, ah, certain groups do well and other people do not. Um, things started to make sense to me, and so, coupled with the work that I was doing with, the community college students and it all, I have always, always been attracted to students who are not traditional learners and students who don't fit, um, so even when I was teaching high school, those kids who, I never liked my honors classes. I loved the classes where I could help students find their way, so.

Since earning her degrees, Delia has served in increasingly responsible academic administrative roles and continues to be passionate about access and success, with a desire to return to working at a community college at some point in her career.

Delia was raised in a family with a strong connection to their [non-United States] heritage. Her mother and grandparents faced severe discrimination because of their ethnicity and learned that not complaining about it was the way to survive. Consequently, while Delia was exposed to diversity of many types in their home, there were never actual conversations about diversity or pointing out of difference. Difference was present, but not discussed, except when a negative event occurred.

Um, [laugh], so, um, I was, I was raised in a house where there was abs[olutely], there was no, there was never talk like racist conversations or negative statements about sexuality or whatever and my parents had um, like my [mother] was a craftsperson and so the house was always full of kind of odd people [laughter]. And that was back when it was unusual to be gay, like people used to say “lezzie” and stuff [laughter], you know like. It was, it was there was. It was like a very different world...but that was the way I grew up...no one, but the thing is, no one ever talked about it, so I grew up with this and I thought it was um, I don't know if it. I want to say that it was normal, but I never thought about it because nobody ever talked, nobody ever called attention to race or called attention to, eh sexuality. It was, it was, um, even gender, like it was something that I knew difference existed, and, and, I can remember one of my really good friends, um, was a

Black girl, and I remember her saying, um, I'm never gonna have a boyfriend, and I never thought, I, we like, we just never pursued. . . .

So I always, um, thought of myself as really open minded, because, that was, you know, I just kind of grew up with it and I was you, know, my parents, not so much my dad, but my [mother] was very hippy and whatever and I do remember once I had a friend, whose family was really racist, and I remember her showing me this thing where she had this, a little thing of water and she shook in pepper and it floated on the top, no, she shook in salt and it floated on the top and then dropped in a grain of pepper and the salt moves to the side and she was like that is what happen when a Black person gets in the pool. And I remember being like oh my god, like thinking of it like that's really cool that if you dropped in this one thing, everything moves to the side, so later than night, I remember my dad came home from class and I showed him and my father was like I don't ever want to see that again, that's not okay, do you understand? That's not . . . like he never said why. But, but I knew that, like even talking about it now, my skin is crawling.

Delia's sense of being open minded was supported by the diversity in her family, as well as around it; a sibling is in an interracial marriage, and she has biracial nephews. She is also married to a person from a rural, low income family, different from her educated, middle class family. Delia is well versed in women's studies and considers herself a feminist. In addition to her passion for equity and justice for others, Delia has also had personal experiences that have created a passion for justice. She is a survivor of cancer and endured chemotherapy and radiation as a young child. She has had close friendships with low income people of color and remembers that she was never able to go to their houses, even though they often came to hers, because they lived in bad neighborhoods. Perhaps most impactful, Delia is a survivor of a sexual assault, which occurred in her first year of college. This traumatic experience, with its attendant questioning, and the vulnerability it engendered, made Delia a feminist.

And I think the other piece is....it wasn't until college, I mean it wasn't until what happened to me, it wasn't until being raped, which happened to me in my freshman year of college, that the...I'm just realizing it now, because I wasn't a feminist or so before that.

But I think that really, subconsciously, apparently [nervous laugh], I became very aware of what it means to be a woman. And how that is very different and I currently have this argument. This philosophical argument at the dinner table. I was explaining once that sometimes I get nervous walking from, you know, class, you know, home at night, if it is dark. And my dad was asking questions about what was it that made me nervous and I was like, because every man is a potential rapist. Meaning that, and at that point, he didn't know what had happened to me. My [mother] knew, but he didn't know. But meaning not that every guy will rape you, but that you know, intuitively what I am saying, but he was really angry with me, so he was like so every man is . . . and I was no, but as a woman, you don't know, so you don't know where you are safe, it is always scary.

Participation in the Non-traditional Diversity Training Program. Delia felt drawn to attend the program, although she cannot pinpoint why, especially since she knew she was open minded. You know, I've asked myself this question a bunch of times. And I don't have an answer for it. And that's why I feel like it was ordained...do you know what I mean? It feels like...because I don't do shit like that...I just don't. It's funny, when I went up and I presented to [HR]. And eh, they were like we noticed that you don't take part in any of the ...I just don't. I don't go to any of the [HR trainings] things...I'm like I am busy, I do not have time to go to extra meetings, you know, I'm not interested, I'm regularly sending other people, I am just not a joiner...and um, . . . There was something about this—I don't know. But there was something about this, when I was like, I'm going to do this, which is insanity, because it was lot of hours, you know? But it's the same thing with [an institutional initiative]. That just kind of plunked into my lap as well. But it truly is, you know, some of the best hours that I have in the week.

Influential aspects of the program. Delia was initially very triggered by primary facilitator assertions such as, “Once you see, you can’t unsee.” She then received her results on the Intercultural Development Inventory (Hammer, 2012), which were a surprise to her, based on her self-perception and experiences. Then Trayvon Martin was killed, and this combination of events served as a major, transformative moment.

And I think the other was that I resisted the idea that I was in some way privileged. Like that really ate at me and I can remember being angry, like I can remember going home and being like, I don't know, why am I doing this, this is, why do I want to sit for two hours and be told that I am not a good person. Like that’s the way it felt to me, and it was funny because at the same time, one of my colleague's husbands, they were doing sensitivity training and he was like, she would tell me stories about angry he was. He would come home and be so angry and I wasn't feeling that strongly [shared laughter], but I definitely was like, what is that about [Primary Investigator (PI) laughing]. I am so bugged and then, and then Trayvon, and I can remember, so the Trayvon thing happened, I remember, reading about it, and then I heard about it, and it was like, maybe it was a day before the, we had an [Non-traditional Diversity Training Program] session and I remember thinking about my nephew and thinking oh my god, I hope, my brother-in-law is teaching him, just to be like, aware of this stuff. And then feeling, I was blown away by this feeling that this happened and back then, it was isolated, right? Like back then it was this isolated thing, it’s not like today when you realize it is happening all the time. . . . I think it was like I started, everything just went like click click click click click into place, like I remember, within that 24-hour period, [small, Northeastern city] had undertaken, the police department had undertaken a year or whatever prior, some study to see where they actually pulling over people of color more often or differently and what were they finding?

It was the thing that was being done nationally and the findings were like really compelling. You know, not good, we weren't behaving in a good way and, and eh, and I felt really strongly and I remember going into [Nontraditional Diversity Training Program] and I brought up Trayvon and I mean, I think it was

just in that sort of our “What's going on?” check in and I brought it up and I remember choking, I felt so emotional about the situation, it was so, it just blew me away, and I remember thinking about, because Trayvon, Trayvon would have been the same age as my oldest, who, and thinking, how do you do that, how do you do that as a [mother]?

How do you? and then realizing that for many [mothers], living in certain areas, and I remember hearing about, on NPR, on one of the, I don't know if it was this American life, but the idea that, um, graduating from high school, being alive to graduate from high school in many parts of this country, as an African American man, as a young man, that's huge, to be a [mother], who gets your son, through 18 years of life, and he's alive and he walks across that stage, is bigger than anything you can imagine. And all of this stuff just came together. And then the violence and the fact that that happened in Florida and what happened to me happened in Florida, and um, it just was, there were a lot of things that clicked for me, um, and it made me start. I think what happened was, I just opened it, it just...I cracked open.

This external, unrelated traumatic event connected with Delia's prior trauma of being raped because of the similar feeling of never feeling safe and because the two events occurred in the same state, and this experience fully opened Delia up to learning. She was able to process the trauma of her rape, something she had never really done, through her processing the trauma of a mother losing her son. The engagement, or lack thereof, of her fellow cohort members ceased to be a concern, and she immersed herself in the reading and lectures. She was an active participant and often put the Trayvon Martin killing back on the table for the review of the group, provided strong perspectives on the experience of women in the workplace, and encouraged her colleagues to dig a little deeper. In her words,

I wanted to listen to you, and I wanted to talk about it, and I wanted to do the readings and engage and process and I just, it literally, it was just this feeling of like...cracking open and that's when, within, maybe the next two weeks, I started. You introduced us to Tim Wise [popular national speaker on white privilege], and I watched him speak and was like...everything he said made so much sense, everything he said....and all

of a sudden, I understood privilege. And I became really, like, everything that has been political for me all of sudden became personal. And you know they talk about the personal being political. It was like the opposite for me, I have always been political, and I've always been kind of out there. It never has felt...even with the rape. Even when I, there was a distance there and all of a sudden, it was like, it is not technical anymore, this is real. These are human beings. And we have a responsibility.

Mapping to Mezirow's (1997) phases of transformative learning. Delia can point to specific ways the program has impacted her. Personally, as she has helped her children look for a college, she has focused on colleges that had at least 30% students of color, as this was mentioned during the program, based on the work of Rosa Beth Moss-Kanter, on gender in organizations, at the point at which critical mass is achieved. She has been pushing this number, because she wants her children to have a meaningful engagement with diversity. She also speaks about challenging conversations with her son, who for a while, made insensitive remarks in the name of humor. At work, Delia has been a powerful leader for diversity and inclusion. She has advocated for better representation of minorities in marketing materials, has become a vocal advocate for diversity and inclusion on institutional bodies and has had members of her team also participate in the Non-traditional Diversity Training Program, with graduates now working on creating initiatives to infuse diversity and inclusion into every area of their operations. Table 5 illustrates Delia's phases of transformation.

Table 5. Phases of Transformational Learning Experienced by Delia

Phase	Description
Disorienting dilemmas	<ul style="list-style-type: none"> Delia experienced several of these, both within and outside the program. The two most profound were the Intercultural Development Inventory report and the killing of Trayvon Martin, which was a focal point for her learning efforts.

Table 5. *Phases of Transformational Learning Experienced by Delia* (continued)

Phase	Description
Disorienting Dilemma	<ul style="list-style-type: none"> Spurred by the Intercultural Development Inventory results, Delia re-examined her sense of being open minded and having social justice figured out. Trayvon Martin’s killing and the data in the [small, northeastern city] showing that that the racial disparities in traffic stops in the city matched national trends all caused Delia to re-examine what she thought she knew about race in the United States and her responsibility as a White woman to act.
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> Emotion was also a big part of Delia’s learning. Anger at some of the primary facilitator’s assertions, surprise at her Intercultural Development Inventory results, irritation with her self-righteous cohort members, and most importantly, the pain of loss and trauma, all played a role in Delia’s transformation.
Recognition of shared discontent/community	<ul style="list-style-type: none"> Community was actually an initial deterrent to Delia. She felt like there were several people in the group who were there to show how advanced they were; they were self-righteous, and this turned her off. One of the most vocal of these group dropped out, the only time this has happened during the eight cohorts of the program, and that absence, plus Delia’s disorienting dilemmas, helped her focus on her learning. Delia did appear to find abstract community, though; she really connected with African American mothers, who worried about the safety of their sons. It was a community shared by the love of a mother, but separated by race, which impacted the degree to which mothers prepared their sons to interact with the police.
Critical reflection on assumptions	<ul style="list-style-type: none"> Delia really grappled with the idea that she was privileged. Her identity and experience, as woman and as a feminist, had her focused on her lack of privilege. Grappling with her Whiteness was an important process for her learning.
Exploration of options	<ul style="list-style-type: none"> Once she “cracked open”, Delia’s orientation, bolstered by her existing commitment to access and social justice, was focused on learning and understanding and finding her place in the solutions conversation, because she felt that those with privilege had a responsibility to act.
Trying on new roles	<ul style="list-style-type: none"> Delia has stepped into the role of advocate and ally.
Planning a course of action	<ul style="list-style-type: none"> Delia has strategized ways to show up at work and at home that meaningfully advances diversity and inclusion outcomes.
Acquiring skills and knowledge	<ul style="list-style-type: none"> Delia has continued to read and learn and process this information. She sat through the program a second time and was just as engaged, and vocal, learning and enhancing the learning of others.
Building competence and self-confidence	<ul style="list-style-type: none"> Delia has continued to become more comfortable and confident in her role as ally and advocate.
Reintegration	<ul style="list-style-type: none"> Being an ally and advocate are not an ingrained part of Delia’s identity.

Mapping to Bennett's (1993) developmental model of intercultural sensitivity. Delia's original Intercultural Development Inventory (Hammer, 2012) results placed her at early minimization, with a tendency to overestimate knowledge of cultural differences and overemphasize differences. Her actions, including steps to translate theory into practice clearly exhibit an ethno-relative orientation, showing that she has moved from early minimization to acceptance. She exhibits stage appropriate competences, such as the recognition of the shared experience of pain between African American mothers and White mothers or the pain of death, and the pain of a sexual assault, while also recognizing the different experiences White mothers and African American mothers have and the different steps African American mothers must take to keep their children safe.

Summary. Delia experienced transformation of a frame of reference. The understanding that she was privileged, coupled with a deeper understanding of how systems work and exclude have been profoundly impactful for her. This new lens has impacted how she has made decisions about her family and how she has conducted herself at work and with her team. In terms of *personal antecedents of transformation*, Delia's education and prior learning about diversity and inclusion, experiences with difference through her teaching, family and friendships, passion for access, openness to learning, and prior trauma from a sexual assault were all facilitators of learning. *Programmatic facilitators of transformation* included Delia's Intercultural Development Inventory (Hammer, 2012) results, her in-program exploration of Trayvon Martin's death (room to reflect on public events), and her interaction with challenging content presented in the context of the program.

Interview 2: Joseph

Joseph is a White, Hispanic male in his late thirties. Joseph comes across as mild mannered and thoughtful. He is a deeply self-reflective and aware man, who is very committed to his family and wants to serve as a role model to his kids. As he said,

The values that drive me? At this point in my life, it's just being a good role model to my family, doing well, always continuing to learn, um, yeah, and just being someone who I can be proud to know that my kids look up to and emulate my behavior.

Joseph started out as a journalist, and his interest in security and openness to new things have taken him through a few career iterations to his current work in technology and web development.

The child of Hispanic immigrants, Joseph has spent his life navigating the reality of two cultures, sometimes rejecting his Hispanic ethnicity and sometimes leveraging it. Throughout the interview, Joseph reflected on the deep shame he carried because of his culture, the treatment he received from other kids, which increased his desire to pass as a “regular” person, and the fear he experienced when he was younger of being “found out” as ethnic.

You know, we were, you know, immigrants, um, and kids, you know, they're ruthless when it comes to making fun. . . And so, even though my friends might not have known that it would cut me as deep as it would, when they made fun of my background or my mom's accent or my dad's accent—they would always make fun of me—I would like internalize that. And do, so it became my mission to drive away any of that difference.

You know, because I was insecure, and I just wanted to fit in. Um, yep. So, um, it was, yeah, I mean, [difference] was bad when it came to my own—who, who I wanted to be and who I wanted to relate to, like what my values were back then. You know, back then, my values were I want to be accepted by my peer group that looked like me. And, and it wasn't necessarily a, a, a conscious effort to sort of like push away anyone else who didn't look like me; it was just that as I got more and more friends, they just happened to look like me, and as we became closer, the differences between us became more apparent. And that became more of a source of sort of like a little inner turmoil, maybe some shame, for me. Of course, now looking back on it, it's just ridiculous what kids think.

Um, but that's how it was, you know, that's how it was almost all the way through high school and college, just um, because I was a little—completely ignorant, you know, and my value system was upside down. [Silence.]

I have a note [from the journal used in the Non-traditional Diversity Training Program] that says, like, there was always, there was always this palpable feeling of shame. . . . When we'd be like at a—when we would be in public, and this like, you know, White American family would walk in, and my family would, like, talk in Spanish, and they'd be like—my mom is such a loud, she has such a loud voice. . . . and she'd be like, “Blah, blah, blah,” and I'd be like, “Oooh, I'm so ashamed.” And like a deep, deep shame. . . . “What am I gonna do? Everyone's looking at me. They're all gonna know that I'm—they're all gonna—my cover's blown, you know? I'm not the person that I'd like to have people think I am, you know?” Um, and saying this out loud right now makes me; it just makes it seem so silly. . . . It was real.

Joseph's desire to get far away from his culture influenced his decision to attend college in [a small Northeastern state]. The college was racially homogenous and socioeconomically privileged, and Joseph encountered a new challenge; he felt economically out of place.

So, solidly middle class, go to [small Northeastern state school] to where everyone is coming from, like, a boarding school. Everyone knows each other from boarding school. Everyone, like, that feeling of—I don't know; it was a very, it seemed like a palpable sense of—not superiority, but there was just definitely something going on there my freshman year, when everyone's new or when everyone's just sort of like feeling each other out. Um, I felt very, I felt very, comp, like, what am I doing here? Like, this is, this is—I don't really belong here. This is not my, this is not my background, you know. There was like a lot of blueblood going on there, it seemed to me. Again, this is insecure me thinking.

So, yeah, I mean, it was kind of a struggle, but then I sort of this one, this one moment, some random, like completely insignificant night where it dawned on me that everyone is insecure at this age. Everyone.

We're all insecure. And, and so now, looking, thinking about that, it seems almost ridiculous to me to go in as like a White-skinned male to a situation like [small Northeastern state college] and think to myself, I'm completely different here, because I'm not.

Having navigated through shame and insecurity, Joseph remains acutely aware that when he presents as a "regular" White man, he has the ability to pass and gains many privileges that might not be available to other Hispanics who are darker skinned or from other nations. He is conflicted by this reality, and in general very aware of the many societal privileges he has, and he seems tuned in to the pains of exclusion, even though they are not directly his own. He has felt a desire to connect with other immigrants or ethnic minorities.

Now looking at it, you know, if I had been a Hispanic male from Mexico with darker skin, that would have been a completely different story for me. So there was that, and, uh, I mean, I always wanted to relate to the other, like other ethnic, other people who I knew were first-generation immigrants or children of immigrants, because I knew what they were going through, too. There were times where it dawned on me, like slightly, that okay, maybe this person from India, who is clearly Indian, you know? There's no—you can't, you can't say, you can't look at them and be like, "Well, maybe he's from Ireland or maybe," that people are judging them point blank, before a second even goes by, and it's just, I don't know, it just doesn't seem fair.

Um, and, you know, to some point, to answer another question about why I participated, I felt like, I, for me it was like a double-edged sword, okay? I'm a White person who's ethnic; there's some advantage to that when you're applying to college, you know, when you're applying to some work, or doing some things where they want to see some level of, like, cultural more-ness that you may or may not have.

So I definitely did use that, you know, and my mom would tell me, like, "Make sure you mark down every box as Hispanic and this and that; it's only gonna help you." And I did. All the while, hiding behind the White dominant thing, and so that there was a feeling like, okay, I should really own up to that. Every day, in

every interaction—um, I, like I, we touched upon this just now—I could, at least I could hide behind my White skin and not open my mouth, and I would only be outed if my family or anyone spoke up about it.

People can't, and I'm lucky with that—lucky, whatever—my particular reality allows for that. Most people, most Hispanic males, can't—you know, especially non-European Hispanic males—they have, people, they get judged as soon as someone reads their name. Whether or not that happens to everybody, I'm sure that happens to everybody, but someone reads a name on a resume, and they're immediately judged.

Participation in the Non-traditional Diversity Training Program. Joseph was motivated to participate in the Non-traditional Diversity Training Program by his desire for self-reflection and intercultural growth. As someone who is White, but ethnic, I thought that participation would help expose my own, my own unconscious bias, my own feelings of unconscious negativity towards someone who might be different, just whether or not I think it's right, it's an unconscious sort of snap judgment that may or may not happen. So, and I think it, I think the class did amazing at that.

Influential aspects of the program. Joseph expressed that the program really allowed him to step into others' shoes and get a deeper understanding of exclusion: There was one class where we talked about how some people, like African women or men, they don't walk around smiling all day long. . . And that's no indication that they're sullen or threatening or anything. . . It's just the way it is, and you can't, we can't make judgments on people the way they present themselves. Because it's just not right, and it happens all the time. . . . But, yeah, I remember that being—that stood out to me, that particular conversation we had.

Joseph also stated that the program provided a space for him to examine things that things he has long wanted to explore and reflect on. He described that the program allowed him to delve into the complexity of experiences people have, which he calls “the struggle that exists for everyone,” again with the sense that some have it worse than others, by virtue of their demography. Joseph expressed he has increased his sense of mindfulness and other awareness.

You know, so, that's another reason why I wanted to sort of—I think it's so easy, especially in this state, to just go on as a White person, about your day, uh, with blinders on, and um, without a con-, without a sort of a—there's a thing about emotional intelligence and cultural sensitivity—so I want to be a more emotionally intelligent person.

I want to be constantly observing what my reactions are and taking note of them, just gathering data on my own self. And so I think [the] Non-traditional Diversity Training Program was a great, a great, um, opportunity to bring up the things that I may overlook, um, bring up experiences that people have, feelings that people have, without, that I may never have ever considered.

Conversations related to differential treatment and unconscious bias and differential treatment also impacted Joseph. He said,

Discussions on emotional intelligence regarding conflict and diversity. So these are things that contributed most to my learning as a participant. So, we touched on this briefly: Discussions on emotional intelligence regarding conflict and diversity, discussions about society and personal identity. You can't possibly know what motivates other people no matter what projections they give to the outside world. People never know others' experiences, and it's dangerous to make assumptions based on that, on that appearance. And these are things that you don't need me to say out loud; I mean, it's just the fact. You can't judge a book by its color. It's that easy, or—I mean, it's not easy, but it almost comes down to it; you can't possibly assume that you know the journey of this person based on one or two interactions. And that goes for any color, um, but the fact that that sort of dawned on me in the context of non-traditional diversity training program, I don't know, that just made it really clear to me.

People can't, and I'm lucky with that—lucky, whatever—my particular reality allows for that. Most people, most Hispanic males, can't—you know, especially non-European Hispanic males—they have,

people, they get judged as soon as someone reads their name. Whether or not that happens to everybody, I'm sure that happens to everybody, but someone reads a name on a resume, and they're immediately judged.

There were definitely perspectives that were brought out among the mostly White participants that I hadn't, I hadn't thought about. Um, so, it wasn't really—I don't know, I feel like I didn't get as much out of the, the participants who weren't going through this every day.

I got more out of it, reflecting on, what, like, put myself in the shoes of someone who has to go through this, who has to suffer through these sort of silent biases at every turn. And it, that's what made me sort of, gave me pause and made me think about it on the drive home from work and be like, "Well, what, what can I do?"

Mapping to Mezirow's (1997) phases of transformational learning. A recurring theme through the interview was Joseph's sense that he was not doing enough to impact change. He stated,

You know, if, if—it's like on what—going back to that point where—the sullen expressions on people. On one hand, "Oh, this person looks, you know, doesn't appear to be happy. Maybe they're sullen or threatening." But on the other hand, if they did the opposite, they might be perceived as pandering. Or, it's just like, how do you, how do you win, you know? And so that was the thing that, that was sort of the question that kept coming back to me, How can I possibly affect anything beyond my own little world and my own mind? And you know, I always struggle; like how do—if I am sort of talking to someone in confidence, as a person of color, like how am I perceived by them? Like are they—do—am I being, am I unconsciously being like, trying to overcompensate for my Whiteness? I don't know.

Joseph is open and willing to do something, because he feels a sense of responsibility and wants to help, wants to ensure that his experience is more than just an experience. He is just not sure how to do something and does not believe his current sphere of influence allows him to do much related to diversity and inclusion. He expressed a

willingness to use his writing skills to help young people who might be struggling with their identity and insecurity, and, following the interview, he accepted an invitation to speak to first year students about their struggles.

And on top of that, it's just like a—you know, you said a blog—and I like to think that maybe some people might find value in something that I can do, you know, or I can write on my own thoughts, my own experiences, but there is sort of that level of like, okay, but is that enough? . . . I don't know. I wish I could offer an answer that I knew would have palpable results. I'm always left with this feeling of eh, I don't think it's enough.

Table 6 displays Joseph's transformational experiences.

Table 6. Phases of Transformational Learning Experienced by Joseph

Phase	Description
Disorienting dilemma	<ul style="list-style-type: none"> In Joseph's original journal, he refers to the impact of the identity table exercise. The table has 20 categories, on which you can score yourself as dominant or non-dominant. Joseph was dominant on 18 out of 20 categories.
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> Joseph struggled with shame and with insecurity, related to his Hispanic heritage and socioeconomic status. He has felt shame related to being an "other" and related to the fact that his apparent Whiteness shields him from a lot of the negative impacts of discrimination. He has also felt guilty about leveraging his ethnicity, when it could be beneficial.
Recognition of shared discontent/community	<ul style="list-style-type: none"> Community was not a critical part of Joseph's learning; reflection was.
Critical reflection on assumptions	<ul style="list-style-type: none"> Joseph has reflected a lot on the unjust treatment people from minority backgrounds receive. He has also reflected a lot of his privilege.
Trying on new roles	<ul style="list-style-type: none"> Joseph's commitment to being mindful and emotionally intelligent, interrupting his unconscious biases. He is also willing to take more proactive actions, if the opportunity presents itself.
Reintegration	<ul style="list-style-type: none"> Joseph's mindfulness and reflective orientation around diversity and inclusion matters are now an enduring part of how he shows up.

Mapping to Bennett's (1993) developmental model of intercultural communication. Joseph's Intercultural Development Inventory (Hammer, 2012) results placed him at the end of minimization/cusp of acceptance. His comments during the interview, especially his desire to act and act well, his sense of paralysis about action, and his focus on the context for people's actions that might be misinterpreted by others indicated he is at early acceptance, displaying an ethnorelative orientation.

Summary. Joseph experienced a transformed point of view. The program grounded him in the experience of others, who like him, might feel out of place and he came to terms with the fact that he has a lot more privileges than they do. He also realized the power of snap or unconscious bias and the impact it has on others. Finally, he developed a desire to act, and although this has not fully translated to external behavior, there is an internal effect, as he seeks to be more mindful and interrupt his own biased behavior.

In terms of *personal antecedents of transformation*, Joseph described growing up in an immigrant family, and being bilingual, the sense of shame that came with feeling different; the sense of responsibility and shame for leveraging his Hispanic ethnicity and hiding behind his White skin when needed were all contributing factors to Joseph's learning, as was his reflective orientation. *Programmatic facilitators of transformation* include the privilege exercise Joseph completed that made him aware of how privileged he was, reflecting on the experiences of marginalized groups and reflecting on the impact of conscious and unconscious bias.

Interview 3: Matthew

Matthew is a White man in early middle age. He is a former employee of [a small Northeastern private college], where he had teaching and administrative responsibilities. Matthew presents as polite, friendly, and warm, reflecting on the impact of his upbringing in a small Midwestern town; even though he does not consider himself religious at all, Matthew described his childhood as heavily influenced by a specific religious denomination. He speech is sometimes hesitant, even though he is sure about what he is saying, and his stance is nonaggressive; that is, he does not present as an alpha or a person trying to take up space, and he flashes a warm smile often.

Matthew is a learner. Curiosity is a core value of Matthew's life, and it has driven him to seek out educational programs and pursue multiple life-expanding experiences, such as graduate school and study abroad, which allowed him to ask and explore big questions and experience new things. Matthew explained that he attended a smaller institution and sort of isolated in central [Midwestern state]. Um, and you know, I studied philosophy and political science just because you know, I got really curious, about that stuff and curious about asking questions mostly, ah, and that, that was I think big reason for the philosophy degree. These strong values of curiosity, questioning, exploring, and humility have also allowed Matthew's learning experiences to be transformative ones. Study abroad opened his eyes to his place in the larger world and primed him for further transformative experiences. He then sought a graduate degree that allowed him to focus on learning and helping others to learn.

Matthew's appreciation of experiences, which allowed him to step out of his comfort zone and out of externally placed confines to explore new experiences, was probably the reason why religion did not seem like a viable path forward for him. However, the vestiges of religion are visible, as Matthew's upbringing imparted in him a strong service orientation and a desire to provide positive experiences for others. It also fostered humility, according to Matthew:

So, that I mean that's something else that, um, I value a lot is being able to help other people or connect with other people, but I think, you know, just throughout my career I'm extremely service oriented, or you know, how might, I, um whether it's to please other people or just you know give them a positive experience. Curiosity, and I think humility, and I mean, I think that that, those are you know, humility isn't always the easiest thing, um, and then I think you know it is a big barrier to growth. . . . But yeah, that humility piece is really important to be able to, you know it's like being open to other possibilities as opposed to just, you know, your own current understanding of the world.

This humility and openness to new possibilities make Matthew the perfect learner/teacher, because he believes there is always an opportunity for learning, and he is willing to deal with discomfort and criticism for the sake of learning and growth. He said,

Or, that you know, I don't, I'm sure I sometimes have an ego but like all the time you know I try not to have too large of an ego as a guide. Just because it's you know there's always something I can learn, so I think you know I can take criticism. But so, that I think you know I think everything is sort of an opportunity for learning and growth even if it's painful or uncomfortable.

In his current role, Matthew works with faculty in designing classroom environments and pedagogy and has a powerful commitment to creating inclusive and engaging classrooms. A teaching practicum in graduate school shifted Matthew's self-perception and helped him see himself as a teacher, a concept now integrated into his identity, causing him to feel a sense of loss, now that he is not teaching directly.

So, went to grad school and I was really good, and then had a teaching practicum in grad school, which I think was again a really sort of important experience in terms of seeing myself in a different light, like that I can actually teach people um.

So, and I think, you know, then [I] was a [former job] at [a small, private college in the Northeast] and that was, you know I, I really enjoy that and got to grow a lot there, um, and you know, and continuing to grow, you know. I'm an [current role] here, so it's that mix of education and technology, which is, you know, definitely something that, that I am passionate about.

Um, yeah, so I mean that's something that I'm, whether it's in a formal teaching capacity I was just talking with [my spouse] the other day. You know, I didn't think that I would miss teaching, but you know, I did a lot of teaching while I was at . . . [small, private college in the Northeast], and I'm not doing that necessarily here. But I get to work with professors on you know, impl-, implementing or integrating different learning technologies into their classroom, and I'm regularly now thinking about um you know teaching and,

and how, you know how that can be effective and along with intercultural youth stuff. I mean I've been some about you know critical pedagogy or feminist pedagogy and you know that's some of the stuff that I'm like I know it'd really be fun play within the classrooms, um. I do enjoy teaching, and I think whatever capacity that is whether that's helping others you know create an effective classroom, creating an inclusive room and creative classroom that is engaging as opposed to just you know sort of static.

Participation in the Non-traditional Diversity Training Program. Matthew's curiosity was the primary reason for his participation in the Non-traditional Diversity Training Program. He also thought the program could offer him career benefits.

Yeah, this was the first one, and I mean, I think um, yeah I mean you know it is that curiosity um that's really the big one. I mean I think you know with, you know, I realized that I don't know everything, and you know, I think it's helpful that I at least for the most part try to see everything as a growth opportunity. So, I think curiosity was one of the big things. I mean I think you know also that something like this might help in terms of career you know, personal growth or career growth or just being a better human. Um, so yeah, I think it was kind of, ah, an openness to it but that's probably the, you know, the main reason why I participated in it.

[Laughing] Yeah, yeah definitely. I mean, it's yeah I think being open and being curious I think the first step forward or, at least for me it was the first step to you know just being able to you know learn more or grow more. Like I think that's you know sort of the like necessary soil to be able to grow all sort of stuff.

Influential aspects of the program. According to Matthew, the Non-traditional Diversity Training Program gave him a lens to experience the world, past and present, joining prior transformative experiences, like the teaching practicum and study abroad, to cause himself to view things differently.

And then with [Non-traditional Diversity Training Program], I think that it was, you know, it did give me a different framework. Like I think the biggest takeaway was, you know, this idea of other lenses to see the world that it, you know, my view was the only way to view the world.

Um, so that was I think a really big takeaway but also I think beliefs around um, you know just power and um structures and you know in terms of framework it gave me just a mental place to hang different things. It's like okay, this is an example of power that's going on.

You know I can see that a lot more easily you know whether it's when I was at [small, private, Northeastern college] or you know here at [current employer]. Like okay this an example of you know power going on or you know seeing thing through the lens of you know just some of the opportunities that different people have, have had.

So, yeah, so I mean that sort of belief like I think that it's, it give you know it gave me something to build on and um sort of experiences with difference, I mean I think that it's, you know, I see things through that lens now and I think experience wise I try to seek that out more, um you know seek out difference more whether that's you know I think that's something that I was excited about going, moving to [current city] like that and I think even just population wise is definitely more diverse than [former city].

Matthew also spoke about the critical role of community in his learning process. Hearing multiple perspectives on the same issue was a key opportunity for his growth and learning, even if it generated discomfort. He also spoke about the importance of having frameworks, such as the developmental model of intercultural sensitivity and the Intercultural Development Inventory (Hammer, 2012) and the importance of active processes, such as group presentations:

There's this idea called threshold concepts, and that's, that was something, you know, that I think the [professional organization], their information literacy concepts were sort of based on threshold concepts, so I came across this terminology. But I think this idea of just stepping over a threshold is helpful, and, um, stepping into a new world where you can't see, you know you can't unsee things. Like, um, so, you know, I think that it's, you know, like I was saying, it provided a framework. So you know, for example, for, um, [Non-traditional Diversity Training Program], I think the process was a tie, I think with all three of them

[transformative experiences: study abroad, teaching practicum, and [the Non-traditional Diversity Training Program].

I mean, I think necessarily at times it was uncomfortable because it was challenging something that I previously you know held or something that was previously comfortable. So, with [Nontraditional Diversity Training Program], there were difficult conversations that we had but I think those were also really you know some of the most rewarding conversations that I've had at [small, private, Northeastern college] um, because they were real and because I could tell that I was growing and struggling throughout those conversations.

So, I think, so I think it's you know necessarily uncomfortable and I also think that it's stepping into a new world, that it's you know for things that you can unsee, and then, you know, gives a new framework to see the world that sort of grows your world into, um, like an expanding circle.

Mmhmm, yeah, so I mean in terms of the things that stand out, um, like I was, I was trying to think back cause it was a while ago, but like um, like one conversation that stood out was one about um, I think it was like, I mean I think we are maybe talking about micro-aggression or talking about something. But like we were having a conversation about accents, um, and someone was saying you know that they like to inquire to people about, you know, and like to get to know people, um, and you know ask like, "Oh that's really interesting accent; where are you from?" . . . Um, and you know and a person shared this and then someone else, you know, I think who had an accent or who had been, you know asked this question multiple times, you know had this experience of being asked this, like shared that same experience from her lens. And I think that was something where it's like, oh this is, you know, this is sort of uncomfortable because there's a little bit of conflict just because it's these different experiences coming into contact, but it was.

You know, the, like what would happen if you [indicating the primary investigator] got asked this all the time. We were like I'm from, you know [laughing]. Yeah [laughing]. Um, so that one, you know, that was one that stood out, but I mean, I think it was examples like that, where it was those instances where it

was different perspectives coming into contact that I think were uncomfortable, but were also like really rewarding as well. Or, you know like other stuff that I just hadn't come across like or you know wasn't a part of my experience as, as a White, cis-gender male or heterosexual. Like that, like just some of the, the language around, um, gender or different gender identities and pronouns, and, um, the way, the ways in which people refer to each other, you know, in terms of partners or, ah, a significant other. Yeah, well, I mean I think just different ways of providing those different experiences, you know pedagogically I think were, were really helpful both through the conversations which I think you were probably I mean I'd imagine the most impactful.

Just because it's, it's real people that you're talking to and you, you know you have to engage with them. I mean you have to but it's like they're right in front of you. So, it's like um, like you can't just be like, yeah, that's not real or that's someone you know who lives somewhere else it's like someone in front of you. So, you know that's an example, but also you know like some of the films were impactful as some of the discussions so you know it was some of the discussion, some of the readings. And I think um like the, you know having us present as well like having us be, be actively involved in the process I think was really helpful as well.

That it wasn't just us listening or sitting back. I mean you know there was some consuming of content like you know watching a video or doing whatever but like it was a very sort of active process where you necessarily had to engage with either other people or you know had to present or had to sort of think through things out loud or um, ah actually ah you know engage in the world as opposed to like being disengaged.

So, I mean I think like the presentations or like that we had to do something actively I think was, was really helpful um you know structurally. And you know I think that like having some frameworks was also really you know being able to be presented different things like um, you know like power or like example of

things or like trying to identify things as you know what is this and the DMIS [developmental model of intercultural sensitivity].

In putting his new lens to work, and reflecting on past experiences such as growing up in a home where his mother was the only female, Matthew can see how exclusion occurred, for example, how some of the jokes his mother received had sexist overtones. He was also previously aware that Native Americans in his hometown were not treated very well, and based on what he experienced at his job, this new lens has given him a greater understanding of the depth of systemic injustice. This lens, combined with his curiosity, humility, and service orientation has caused Matthew to continue his learning about diversity and inclusion issues through voracious readings of classics and newer seminal works in the field, as well as attendance at diversity and inclusion-related events.

Mapping to Mezirow's (1997) phases of transformational learning. Matthew has applied his new lens to his past and current jobs, noticing how power and injustice work in current situations and serving as an advocate and ally for underrepresented groups such as LGBTQ students, women, and people of color. He serves on committees and brings his expertise there to further institutional initiatives supportive of diversity and inclusion and is constantly engaged in conversations with likeminded people like his wife, as they think about the impact of exclusion and inequity in the workplace, and in their personal lives, as they look ahead to having children. Matthew has also blogged about diversity and inclusion issues and spoken about them at conferences. As a result of his learning and curious orientation, Matthew is incredibly reflective and self-aware and has explored the literature around these experiences. He spoke often of using a new lens or of a frame of reference or transformative experience, showing that he has processed and understands clearly what has happened and the impact it has had on him. Table 7 illustrates the transformative learning Matthew experienced.

Table 7. Phases of Transformational Learning Experienced by Matthew

Phases	Description
Disorienting dilemma	<ul style="list-style-type: none"> Matthew did not experience a primary disorienting dilemma. He, however, truly appreciated discussions among people in the cohort with differing perspectives and the opportunity to learn about things that were out of his lived experience.
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> Discomfort from some of the content and the collision of different perspectives. Reflection on prior experience, especially jokes with sexism undertones in his family, and the way Native Americans were treated at the place he worked as a young person.
Recognition of shared discontent/community	<ul style="list-style-type: none"> Community discussions were a central part of Matthew's learning.
Exploration of options	<ul style="list-style-type: none"> Matthew continues to seek ways to infuse critical thought into the curriculum and make classrooms inclusive.
Critical reflection on assumptions	<ul style="list-style-type: none"> Matthew has reflected on power and injustice and the impact it has on how people are treated.
Trying on new roles	<ul style="list-style-type: none"> Matthew continues to act as a diversity advocate through his direct work and service on institutional committees and professional organizations.
Acquiring skills and knowledge	<ul style="list-style-type: none"> Matthew continues to learn and apply learning around diversity and inclusion.
Building confidence and competence	<ul style="list-style-type: none"> Matthew has blogged about diversity and inclusion, and the program, presented at conferences, and served on diversity working groups, getting more adept at being an ally and advocate.
Reintegration	<ul style="list-style-type: none"> This is now a permanent part of Matthew's identity and worldview.

Mapping to Bennett's (1993) developmental model of intercultural sensitivity. Matthew definitely reflects an ethnorelative orientation, as he speak frequently about his frame of reference, being only one of multiple ones, and is able to talk about engaging lenses that are not his own, like feminist theory and queer theory. This capacity is impressive, because his original Intercultural Development Inventory (Hammer, 2012) results placed him at early minimization. His continued immersion in learning probably has helped him continue the transformative learning he experienced in the Non-traditional Diversity Training Program, deepening its impact.

Summary. Matthew experienced a transformation of point of view. The following comment was telling:

Yeah, so I was thinking about that and it's a little hard to remember you know looking back that it's like okay things, things have always been this way. But I mean I, I feel like it was more incomplete or there was just a lot of stuff that I wasn't paying attention to or didn't even think about. I think that it was you know there was a lot of things that I was you know oblivious to.

Matthew had experienced the expansion of his frames of reference before. The Non-traditional Diversity Training Program continued and furthered this transformation. Matthew now goes through the world with a lens that allows him to see inequity and he uses his voice and mind to try to address these matters and further the cause of equity. In terms of *personal antecedents of transformation*, Matthew's prior transformative learning experiences, including study abroad, graduate school, teaching practicum, and his curiosity, humility, and service learning orientations all facilitated his transformation. In terms of *programmatic facilitators of transformation*, Matthew referenced the power of the videos, readings, and group presentations that allowed him to do his own research and contribute to discussions in the program.

Interview 4: Gabriel

Gabriel is a White man in early middle age. He is an affable man, who is well loved by students, although he no longer works at [the small, private, Northeastern college]. This interview was a bit different from the others, because it took place during a challenging time in Gabriel's life, when his employment circumstances had changed. As such, Gabriel verbalized significant processing and venting during the course of the interview.

Gabriel vividly described the vulnerability he was experiencing regarding his employment opportunities. Gabriel secured employment after the interview took place.

So open communication about process I think is really important, but then maybe just 'cause I'm applying for jobs right now and nobody tells you anything so you just get, you sit there waiting anxiously, which is very unpleasant. I do value hard work, although I sometimes get really lazy and I'll be done with that. [chuckles]

Um, it's just an awful process. Ah, people don't communicate well with you. Um, you have little to no power, right? Um, you need to be vulnerable, I think if you're doing it right, right? So this is what I value, this is what you know if you're being honest in that interview process in that cover letter process, it's a vulnerable process. You put yourself out there and saying, this is why I'm interested in creating this, right?

Gabriel was raised in an upper middle class household in the Northeast; his childhood was oriented in a specific religious denomination. His well-educated parents impressed service and a passion for social justice in their children and, as a result, Gabriel values helping people and strives for equity.

A lot of my background around difference comes from my own [religious affiliation]. I think I was like the [specific religious ritual], but we have a lot of parts, in the [specific religious ritual] that, at least my super lefty family, um, always accentuates the piece about um, ah, we've been strangers in a strange land, and so when we see people who are now the stranger or the other um, unless you want to be a really shitty [person] and shunned by this group, um, you better treat them well, right? And it's not that explicit but that's how I've always felt about it.

This sense of responsibility has been a governing principle in Gabriel's life, and one that he has literally fought for, as he has served as an ally to multiple groups, including his brother, after his brother came out as gay in high school..

Yeah I also have a gay brother who came out in high school in 1997, so that was way before that was cool and so I got into a few fights 'cause people said things like, "Your brother is a fag," and I was very small and so I punched them which usually then went badly for me. Actually exclusively went horrible for me, I won zero fights. I'm 1 and 4 [in terms of winning fights].

Um, many of these were suburban fights so like whatever. I throw a punch, somebody doesn't get hurt, somebody pushes me down, you know whatever, life goes on. Um, so, I mean that's part of the difference, it's not accepted, I was taught early it's not accepted and I also at some point feel like, if you're going to be a dick about it I'm going bop the nose, like rub your nose in the carpet and be like bad, bad don't

pee on the rug, like you will not do this and then you will at least keep it to your god damn self 'cause I don't want to hear it.

Gabriel's family's financial security enabled him to travel. He spent six months each in two countries in South America, further exposing him to other cultures as a teenager. This immersion experience also exposed Gabriel to his first taste of discrimination, as he lived with a family that had emigrated from Germany and expressed a distaste for [members of Gabriel's religious denomination]. In the midst of this potentially untenable situation, Gabriel was able to connect with the family, especially with the mother, around their shared humanity, and he managed his reaction to their dislike of members of his religion.

My [religious heritage] is a big, I think it is a big piece of that and living with people who expletively told me they didn't really like [members of Gabriel's religion], but I seemed to be okay, um, was, I mean that, when you are 16 is a big thing.

Um, also recognizing that they're bigots but they are decent people is something that I've carried with me for a long time, um, and as I told one of my professors, you know, they really make good ravioli. I mean like homemade pasta, homemade feeling, home, homemade sauce, like nice Italian people they make good pasta, man. And like you might hate my people, but we still want to enjoy it, just don't waste it.

I was the only one that ever complimented the mother's cooking, so ah, we had ravioli all the time. Which eventually got called out by the dad and the older brother, they are like why do we do always eat food that [Gabriel] likes all the time and I'm sure that the [mother] didn't even know why. Right but I'm the only one who complimented her and asked about the cooking, popped into the kitchen when she was cooking, right. After six months, I unintentionally trained her very well to cook all the things I like best; that was awesome.

In addition to valuing equity and service, Gabriel shared that the challenges of seeking a job had developed in him a value for open communication and emphasized his belief in individual respect, two things he felt he was not

receiving at the time. Gabriel's values and dedication to living with authenticity and integrity also led to challenges in the workplace. He is outspoken and can ask challenging questions and believes that his refusal to be silenced and to support unethical activity has gotten him in trouble with his supervisors. He said,

I can't look at that other person and go—actually, my bosses were idiots, what do you want me to do about it? Right. If they're breaking a law I'm going to tell them they are breaking a law, which at certain points, both of them were and they didn't like hearing it.

But I'm not gonna, right so, and then you get into that whole organizational structure and that whole piece about what does the underling do? So you got this loss of power structure. But um, yeah so being unemployed sucks and in our culture, the unemployed are not respected.

Ah, and you can't talk about it with your boss and that's conversation I had with that other person is hey maybe if you kept your mouth shut a little more you'd be able to get yourself in a position and power and do something, maybe, maybe not.

Who would you rather leave behind along the way, do I want to be in a position of power with that group anyway, right? Like I don't know, until then I'm going to act as ethically as possible on a day-to-day basis and that honestly makes you different in our culture.

Participation in the Non-traditional Diversity Training Program. Gabriel was invited to participate in the Non-traditional Diversity Training Program and thought it would be a good opportunity to explore things he cared about and have a space to discuss those issues. He also admitted to some less noble motivations:

Um, if I remember correctly, you [the program facilitator; laughter] invited me. I think there were, I had a lot of worries with the culture at the workplace at [small, private, Northeastern college], um, and I think you were a little bit of like, you know you can't just say the trainings are for everybody else 'cause I'm fine, like you should participate too, to model the behavior you're looking for and maybe I'm not fine what do I know,

right? Like, maybe I'm just, think I know some shit. So, let's go find out, I like talking about this stuff and maybe it'll teach me some stuff. At least I don't need to be in the office.

And I'll be honest; I probably had some like sick little mean part of me that was like I want to see [a specific person at the college] in this one, and yeah, I do remember watching it and being like woof! Some people are just not invested right and that was sad too, 'cause you don't want to see people who like are there to check the box, um, and that's hard because if you're not there to check the box you really want to be vulnerable to talk about these things and stuff.

Influential aspects of the program. Gabriel expressed that the true impact of the program on him was in the acquisition of language for things he already knew and watching frameworks and models play out in real life. He provided examples of micro-aggressions and a privilege exercise:

And it's really nice to get the language. So, you know and I don't think it was in the course, but you and I have talked about um, micro-aggressions, and those are things I have experienced and being able to say oh, that's a micro-aggression, and I'm normal because it took me three weeks to recover. How pleasant to know or um, we did an exercise on this one. . . . I probably scored an 18 or something, but I've never thought of that, but looking at how many different ways people can be ah, non-included, or discriminated against, or even just feel internally different, which is really tough and again it was nice to see a list, right?

I think getting language about it has helped to me talk about difference and equity and inclusion in a way that is less threatening to others. Or that I perceive as the best I think right? [Laughing] So instead of being like, oh you want to be a bigot let me hit you in the nose, now you won't say that in public 'cause you know that's wrong, right? Like and I do like that learning technique if I'm being totally honest, right? Like oh yeah you're a bully, well, I'm a bigger bully.

So, don't do that shit around me, right? Like quite nice homophobes like you could be a bigot in the confines of your own bedroom and that's it. Once you leave, you will act like a human and you'll be nice to

people, you will give them equal opportunity, or I will be here to punish you. It has given me a little language to adjust that a little.

Mapping to Mezirow's (1997) developmental model of intercultural sensitivity. After completing the Non-traditional Diversity Training Program, Gabriel leveraged the language he now has to assist others in processing experiences of exclusion. He was able to provide specific examples of this advocacy, including one with a classmate in his graduate program. He said,

So the person in my [graduate school] cohort who had a micro-aggression against her, she left the room crying, nobody moved, and I left the room and was able to be like, so what you've just experienced was what's called a micro-aggression, if you have ever heard of that. And she said no, so that I said, "That's when this happens, right?" And I got to tell my story, oh yeah, I get that now that too, what a good teaching technique, and I was like and the insidious part is, you know you're now faced with this decision to teach us, or to let us remain uneducated about it.

Right, cause we don't know about schizophrenia, and we don't know about the misuse of that word, we don't like, the group doesn't get it obviously or this wouldn't have happened. Um, and I'm also able to look at her and say, but you need to realize that's your choice and both choices are okay. You can care for yourself and not be vulnerable and I will go back in, I will talk to them as well as I can. Or you can come back and then do it and if it's not working for you, you can get up and leave again. Like you have as many choices as you want, right? And I don't know that I got that in that education but I always think giving agency to somebody is the best way to help them heal like, because honestly what I think happens in micro-aggression is you lose all your agency, you lose all your decision because you can't even force somebody.

You can't even openly say this group has prosecuted me because everybody is like oh we didn't mean to, that's going to be your response, we know it is. And so this woman kept being told all of that schizophrenic, this is schizophrenic like and she deals with her schizophrenic [family member] all the time

and people would just say, “Oh that’s just language we use, like that’s just called troll language. I can’t believe you haven’t adjusted to it yet,” and it’s back on you, and you have no control. So, getting that and I think I understood that more probably through the classes, um and so then when I’m talking to somebody and, be again, like take that into account that would be helpful.

Gabriel’s transformative learning experiences are illustrated in Table 8.

Table 8. Phases of Transformational Learning Experienced by Gabriel

Phase	Description
Trying on new roles	Supporting others who are experiencing bias. Being an ally without violence/being patient with people who engage in exclusion.
Acquiring skills and knowledge	Using the language he learned to make sense of his experience and to advocate for others who are being discriminated against.
Building competence and self confidence	Recognizing and naming a micro-aggression and advocating for its victim.

Mapping to Bennett’s (1993) developmental model of intercultural sensitivity. Gabriel’s Intercultural Development Inventory (Hammer, 2012) results placed him at polarization, a tendency to view cultures as us and them. Gabriel’s polarization included both his alignment with his culture against other cultures and aligning with other cultures against his own. The conversations during the interview showed that this remains Gabriel’s orientation, with hints of some recognition that the “offender is human,” reflecting he is moving closer to minimization.

Summary. Gabriel learned a new point of view. His habits of mind already had him committed to being an ally and fighting for justice; the Non-traditional Diversity Training Program validated his experiences and knowledge, while giving him language and frameworks to approach the work. Basically, Gabriel learned a new approach to being an ally or fighting injustice, education. He recognizes the value of a new habit of mind; a developmental, patient orientation, but he has not yet fully embraced that or replaced his default reaction; rather, he has added the education piece as another tool in his box. In terms of *personal antecedents of learning*, Gabriel’s rich

experiences with and learning from his religious heritage, travel abroad, and having a family member who came out as gay when he was younger probably all helped developed his interest in and passion for diversity and inclusion. In terms of *programmatically facilitators of learning*, the privilege exercises, conversations about micro-aggressions, and others' models and frameworks gave Gabriel a language to talk about things he already knew.

Interview 5: Esther

Esther is a mature, White woman who came to work in the United States from another country. She said, My background has always been focused on teaching and my [educational degree] is in teaching....so I think in part that is what drew me to [the university]...I can do research....it's interesting but I do better in the classroom [with students who are relatively new to the university].

Esther serves as a faculty member who teaches undergraduate students at the university. She mentioned that she comes across to people as "I would say cold, distant, cool, removed." Esther is hyperaware of this façade and the impact that this demeanor has on others' reaction to her or perceptions of her, including the challenges it presented when she was interviewing for her current role. However, she is unable or unwilling to change to the "overfriendly" American style, as she describes it, in order to be better accepted. Being on the outside is a constant thread in Esther's life.

Reflecting on her upbringing, Esther said,

I grew up in [a small international town]. Nobody grows up in [this town]. [PI laughter]. I played the [a relatively rare musical instrument]; nobody plays [this type of musical instrument], and I grew up [in a specific religious denomination], right? A [member of a specific religious denomination, musical instrument] player from [small international town].

So, I have always felt, and then I, my mother just, my mother got her Ph.D. She grew up on the west coast, she went to [an elite, west coast, private liberal arts college], and she got her Ph.D. in the 1960s in [an

advanced science field], right? So, I mean no one's family is normal, but my family is not normal. I have always felt different and so yeah, I have always felt other, but I think everybody does.

In addition to, or maybe because of, her experience with vulnerability and feeling “other,” Esther was aware of the differential treatment people received in school while she was growing up. There was a substantive presence of international students in her town, and this presence had some markers, such as the smells of different foods in student housing, or a person giving a presentation wearing a head covering, but the tacit message was not to talk about difference or point it out. She noted, however, that indigenous people in her classes were always on the outside; there was no effort to try to integrate them and from her perspective, the students also did not try to integrate with the rest of the community. She said,

So then the irony of that was that we always had [indigenous] students...they never integrated, the teachers never made an effort, we never made an effort. It was clearly, they were clearly were the others, so even though we had this, this many nationalities in the classroom, they were the ones...who were just ignored, and I was always aware of that.

This sense of being on the outside, and the vulnerability that came with it, is a major part of Esther's identity and how she interacts with the world. As such, she seeks opportunities to connect, even when it may mean that she may overgeneralize similarities and minimize differences. For example, she mentions how connected she felt with women on an international service trip. In truth, besides sharing gender and parental status with many of the people she encountered, the socioeconomic disparities between the served and the server made for very different realities.

As a faculty member who teaches courses designed to promote critical thinking, Esther is able to bring the same level of self-awareness and critical reflection to her own life. On some level, she recognizes that the vulnerability that comes from being outside her comfort zone can actually be a gift that can be leveraged to make her a better teacher.

People don't naturally gravitate to me—I tend, for whatever reason, to make them uncomfortable. When I am made to feel uncomfortable I am hyper aware of how people are responding to me and am so grateful to those who are kind to me and help me work through whatever it is. And often, it's simply just that people don't laugh at me or yell at me and I feel grateful. But it's also very humbling. So when I am humbled, I am more sensitive to the people around me and I am able to be a nicer person. That doesn't mean that people gravitate towards me anymore, but it does mean that when I have a student in my office who is struggling, instead of being dismissive, I am patient and try to work with the student. In the classroom it means that instead of throwing my hands up in frustration at the entire class, I take the time to think and try to understand whatever the situation is from the perspective of the students. Perhaps most people do this naturally. I don't. It's too easy for me to slip into a mold of being expert and everyone has to conform to me. Experiencing vulnerability myself reminds me to be kind and consider alternative perspectives.

Participation in the Non-traditional Diversity Training Program. When asked why she participated in the program, Esther said, “Alright, to be totally honest, I had no desire to do it.” She said that she was attending an event at the college and heard the program facilitator speak about the program. She said, “I knew that it was going to come down to it at some point that I would have to do it or I would be the only one sitting here. Peer pressure.” Since it appeared to Esther that many of her colleagues were engaged in the initiative, and sooner or later, everyone would have to engage, she decided to participate.

Esther came into the program sure that she was progressive and initially expecting that this self-perception would be affirmed. She shared her paradigm:

I am a middle aged White woman, who, you know, I like to travel, I do cool stuff and I think I am really or I thought I was really a good learner and I am really open minded then all those things that you expect. I remember when I was in [non-United States country] with some students, and [a colleague] was there. We were working on a project together and we were kind of up to our knees in manure, you know, and [my

colleague] said, “You know, [Esther], I have got to give you kudos, not many White and middle aged women would be doing what you are doing, and I was like yes!” But it was almost like a label or a pin saying, or a check box saying look how diverse I am, or look how open minded but I am. I already knew everything. I am open minded. There wasn’t much for me to learn. I appreciated diversity, I appreciated multiculturalism, I appreciated different cultures. This is just an exercise I need to go through because I don’t want to be the last one.

Looking back at her overall experience, Esther realizes that she was in a smug place, sure that she understood the important pieces related to diversity and inclusion and only participated in the program because it seemed like everyone else was or would become engaged with diversity initiatives on campus.

Influential aspects of the program. Esther asserted that the program had a profound impact on her, describing it as experiencing a “physical shift” in her brain, even though she did not expect it to. She said, “I have [been] thinking about two things that still kind of stay with me.” In thinking about the first one, Esther’s original shock came when she took the Intercultural Development Inventory (Hammer, 2012). She first took the inventory, upon return from an international service trip, and felt certain she would do well. When she received results she did not like, her original reaction was to reject the results and disparage the test. However, her cohort was given the opportunity to take the test again. And Esther decided to take the test again, approaching the questions with a more critical lens.

In doing so, the question about human similarity, which she had responded affirmatively to the first time around, gave her pause, as she remembered one of the first modules in the course that presented different spheres of experience: personal, cultural, and societal. In light of this, Esther considered the fact that similarity in one aspect or sphere of life, does not mean universal similarity or general sameness. She indicated,

When I saw that question again, I went, “huh,” maybe not, maybe in this circle we are fundamentally the same but there are these other circles that I am not aware of. So I was really consciously aware of that and

since that time have been aware of how I, I mean I still do it, because I am aware that I make generalizations more typically about women.....Women, we all bond together. We all feel this way, which is not true.

This experience continues to resonate with her, as does “the other one” she mentioned, which was a conversation about societal issues.

Then the other one was that conversation that we had about racism. We had [a participant] really is struggling out loud. Saying, “Wait you are telling that I am racist.” Everything that he was going through out loud, I was going through in my head.

That was really profound for me, but once I kind, of yeah, once I was willing to look at it from a different perspective to kind of say, “Oh, no, what if, okay, what if I look at it from this perspective? What does it mean?” Right and that it would shift to that being, like almost like it would physically shift my brain so that I feel really strongly about that now.

I think this happens to me when something that is inherent in my thinking is so deeply engrained that I can't see the world any other way. Over time, with the right exposure, there may be chinks or cracks or some other challenge to that thinking, but I stick to what I know. Then, somehow, there's one tap or push that's just strong enough to send a ripple effect—or like an egg cracking where it starts in one place but spreads across the egg. Then I have to pay attention. And then it's almost as if the neurons in my brain say "Right, that was no good. This is the way to think now," and they immediately build a new path that usually ends up feeling so much better than it did before. But it is really, for lack of a better term, physiological. The brain, or thinking feels different. It's clearer, more direct.

Once she got past her resistance, Esther was wide open to new possibilities and really appreciated the extended period the group had to struggle with the issues together, because it allowed participants to be able to go on the journey they needed to go on for the new lens to develop. After achieving the new point of view, she is even more authentic about areas in which she needs to continue to grow and the limits of her new lens. She recognizes

that she continues to overgeneralize, but is now aware of it, increasing the chances that she will not make erroneous decisions as a result of this overgeneralization. She also remains willing to keep pushing herself and stepping out of her comfort zone into new experiences and wants to be more intentional about how she presents herself.

Mapping to Mezirow's (1997) phases of transformational learning. Esther presented one of the clearest descriptions of actions motivated by her new consciousness. She said, "Because once you see the different way, then you have a responsibility to act, which is why I was like [faculty colleague], let's try this." She has encouraged her upper class students to focus on racial issues in their work. This decision was revolutionary, as it had not been done by any course to that point. Her students were not as able or ready to be as critically reflective as she was when she progressed through the Non-traditional Diversity Training Program; therefore, she experienced significant resistance and some backlash, as indicated by some negative faculty evaluations she received from her students. Esther appeared a bit surprised by this backlash, probably because she did not provide a lot of external/visible resistance during her learning process; on some level, she recognized that the real struggle was with herself and the resistance and battle was internal.

Esther's experience in the class initially left her willing to keep pushing on difficult conversations but not willing to use race as a topic again. Speaking to the continued process of growth, Esther has now decided to teach about race again, using what she learned on the first try to help her improve her efforts. She has also decided to step outside her comfort zone again, by working directly with students of color who are first generation and low income. Esther also is more open to letting her students challenge her in this classroom, providing the example of using gender based pronouns and having her students challenge her on them. The impact of Esther's new lens also extended to her home life, where she has had multiple conversations with her [child] about systemic racism. While also initially resistant, her [child] has come around and is now able to articulate views on race and racism. Table 9 illustrates the changes Esther experienced.

Table 9. Phases of Transformational Learning Experienced by Esther

Phase	Description
Disorienting dilemmas	<ul style="list-style-type: none"> • Original Intercultural Development Inventory results were lower than she expected; she initially discounted results, but critical reflection on some of the questions when she took it again opened her up to new ways to view things. Trying on a radically new idea: “What if this is true?” Experienced a “Physical shift in her thinking.” She can’t go back. • Conversation about racism
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> • Defensive over results, blamed the test. • She moved past the experience. • She was able to reflect on her resistance and this served as a catalyst for learning. • Sense of otherness and prior experiences of vulnerability she has had.
Recognition of shared discontent/role of community	<ul style="list-style-type: none"> • Appreciated taking the journey with a senior leader and with others from across the campus. • Sensed that in that group, there was freedom to challenge each other and enjoyed connecting to people without titles. • Community appears to have supported her learning, although after the program, she did not have a desire to continue to engage in the community.
Exploration of options	<ul style="list-style-type: none"> • Sense of responsibility to act.
Critical reflection on assumptions	<ul style="list-style-type: none"> • Reflected on her starting assumption that she was open minded and was the same as other women. • Explored a more complex view, humans can be similar in some ways and fundamentally different in others. • Recognized there were things she did not know and she has the tendency to overgeneralize.
Trying on new roles	<ul style="list-style-type: none"> • Instructor who talks about diversity • Mother who talks to child about racism • Child now speaks about racism • Influences faculty partner to develop a focus on race in course
Planning a course of action	<ul style="list-style-type: none"> • Develops a course with a faculty partner
Acquiring skills and knowledge	<ul style="list-style-type: none"> • Implements the course • It was a challenging experience. Students were resistant to the idea of systemic injustice. • Bad evaluations and the experience initially turned her off from doing this again.

Table 9. Phases of Transformational Learning Experienced by Esther (continued)

Phase	Description
Building competence and self confidence	<ul style="list-style-type: none"> • She is teaching about racism again and continues to challenge herself.
Reintegration	<ul style="list-style-type: none"> • Esther's efforts continue to show that this new lens is permanent. This is who she is now.

Mapping to Bennett's (1993) developmental model of intercultural sensitivity. Esther's original test results placed her at early minimization, and her posttest results placed her on the cusp of acceptance, indicating that she now exhibits an ethno-relative orientation, although her trailing orientation (where she goes when she is under stress or pressure) is minimization, the tendency to overgeneralize similarity between self and other. She reflects the stance of a person who is progressing in their quest to reconcile diversity and unity, a core developmental task of minimization (Bennett, 1998) and exhibits a greater awareness of herself, her assumptions, attitudes, actions, and their impact.

Summary. Esther experienced a transformation of a frame of reference. She fundamentally sees the world differently and is compelled to act according to this new worldview. In terms of *personal antecedents to transformation*, it appears that Esther's learning orientation, willingness to critically connect, sense of vulnerability, and experiences of otherness appear to be important precursors for learning, reflection, and transformation. Programmatic elements that facilitated Esther's transformative learning experience included the results of the Intercultural Development Inventory (Hammer, 2012); social conversations, particularly about racism; learning about new models; having the time to process as well as to struggle with the material; and finding a community with which to struggle and from which to learn.

Participant 6: Tom

Tom is a mature, White man who works in a technological area. A first impression of Tom might be that he is an average, middle aged, White man in a senior leadership role, but engagement with him provides a more nuanced view. Tom is a quick thinker and sometimes shares his first thoughts. He is confident in his seniority/authority and moves with power, like an alpha. A hard worker, Tom has been working since he was 13 years old, to bring in supplemental income for his family, because his father was not a financial contributor; as such, Tom loves to work, because it is what he knows.

Having been raised by a single parent, Tom was required to pay his way through college. This reality contributed to Tom's taking eight years to graduate him with his undergraduate degree, although he also admitted that graduation took such a long time because he did not know what he wanted to do. He focused in the liberal arts in college and obtained a graduate degree in Europe, before obtaining another graduate degree in a business field in the United States. He availed himself of whatever work opportunities became available, saying he "backed into every opportunity" he had, rather than having it planned, and he weathered the ups and downs of career life, including layoffs, before landing his current role as a result of connections he had made in the community. Tom loves to be challenged and recalled the heartbreak of his first entry level job because it did not allow him to be use his brain. The desire to use his brain and the fact that he has interests beyond technology cause Tom to be involved in a variety of initiatives across campus.

As a learner, Tom holds onto the idea that a critical way to create equity is by providing an education, because this is something that "can never be taken away." He was raised immersed in a specific religious denomination, long recognized for its commitment to diversity and social justice, and has always held the values of equity and justice, but they were untested values:

I was raised to believe that all are created equal and to defend/support initiatives for more inclusion. But over the course of my life, those teachings were never put to the test. I encountered a fair amount of diversity in all

the companies that I worked at but never gave it much thought. I worked with whomever I worked with and race or sex when present was not something that got in the way. This is likely because I was primarily in an industry where one had to be well or highly educated to get hired.

Tom asserted that even when he noticed discrimination, he was still distant from it. He mentioned that his mother had a four-year relationship with a much younger, Black man, who lived with them. This man was subjected to racism, both from within the family (his grandfather threatened to disown his mother) and at many public places. While Tom was aware of this, and they all loved the boyfriend, he still felt that because it did not happen directly to him, he was distant from it, a bit disconnected. This relationship occurred during Tom's middle and high school years, so it is possible that the challenges he was experiencing at this time contributed to his inability to connect with the pain of the racism he witnessed.

Tom exhibited himself as expressive and emotional by nature; he is in many ways defined by the most difficult period of his life, after his parents divorced. As he recollected,

Okay, so from [ages] 7 to 13, it was just a hard time because I didn't have parents around. My [mother] had to work all day and go to school at night to advance her career; my dad wasn't in the picture during most of it. I was, I was just an emotional wreck. So, I literally, it was embarrassing in the middle of 7th grade, I would just start weeping.

I was just, you know, and I've never really talked about this but I was lying in bed weeping, going, I'm never going to let my emotions control me like this again because I'm not able to, I'm a very emotional person, but we've got to get up and brush my teeth and iron our clothes and...function. And I hated feeling so dark and overwhelmed and that's kind of basic, and I just kind of bitch slapped myself, talk to myself very sternly and I've been, like I said, I have been running on that script for 40 years. So, from 7 to 13, I just, as a little kid...[Verbal sound] so that was that driver. My dad, um, he basically failed at everything he did.

Tom held onto this script until it stopped working. His experience in the Non-traditional Diversity Training Program, combined with things that happened on his work team and his home life, which he described as “systems not working,” caused him to abandon his assumptions, throw out the 40-year-old script that had closed him off from his emotions and from intimacy, and prepare to be able to hear new points of view. These experiences primed him for learning during the Non-traditional Diversity Training Program.

Participation in the Non-traditional Diversity Training Program. Tom’s reason for participating in the program was solely supervisor support: “I was newly hired. Diversity and inclusion is one of the five pillars. [The university’s vice president] and others said it was a good experience. And so I just signed up.”

Influential aspects of the program. According to Tom, the Non-traditional Diversity Training Program “changed the lens through which I look at [diversity and inclusion].” Tom further described:

I was already unwound a little bit from, I actually think it was a combination of things, but going through [the Non-traditional Diversity Training Program] just left me confused in a good way, when I shared, it’s just a big freaking problem. The program successfully debunked much of my beliefs or perspective and forced me to acknowledge and lean into the complexity and the challenge. This is where I am today just not trying to solve anything but being aware of the complexity, and size of this work.

His current approach is to throw out his initial, knee jerk response and see what comes next; Tom explained that his next thought or instinct is often a lot more grounded and centered. He got to the end of himself and was too tired to hold on to a script that was not working and is in the process of being deconstructed.

According to him, a lot of the growth has come through the reflection that came after the Non-traditional Diversity Training Program ended, as his focus during the program was focused on getting through. He talked about the fact that in order to grow, people must be willing to have their ideas challenged, “To sit there and take it” in order to be able to hear or see anew. He shared his struggles during the program, including his sense that his experiences

and challenges had not been validated, but he later acknowledged that the process was required in order to get the point across.

Mapping to Mezirow’s (1997) phases of transformational learning. Tom takes his new lens into his daily interactions. He provided an example of a conversation he had with a new employee, a veteran, which turned to the unequal application of the GI bill and the impact this has had on African Americans. That a first conversation with a new employee, who was a White male, took that direction says something about Tom’s new reality.

Tom also regularly convenes other graduates of the Nontraditional Diversity Training Program to talk about issues of the day or whatever is on attendees’ minds, and he has continued to do this even after the others, who said they would partner with him in offering this forum, have lost interest. He is now seeking ways to expand beyond these general meetings to create even more impact. Tom also shares the impact of supervisory support on his learning and subsequent actions. He participated in the program because his vice president asked him to. And he knows that both his previous and current vice presidents support his engagement with diversity and inclusion initiatives, even though it is not a constant conversation between them. Tom finds reinforcement in the fact that these vice presidents have been visible supporters themselves. Table 10 illustrates Tom’s transformative experiences.

Table 10. Phases of Transformational Learning Experienced by Tom

Phase	Description
Disorienting dilemmas	<ul style="list-style-type: none"> <li data-bbox="649 1325 1782 1524">• Tom pointed to a jarring experience when the primary facilitator told him that his experiences of being raised by a single mother and paying his way through college did not matter in discussion about racial privilege. Tom experienced a sense of anger at the facilitator’s perceived hypocrisy, and also a sense of not feeling validated for his story and struggles. Tom has a new understanding of the systemic and historic nature of current racial disparities. <li data-bbox="649 1530 1782 1598">• He has also dropped the script that prevented him from truly listening and is open to pushing back knee-jerk responses.

Table 10. Phases of Transformational Learning Experienced by Tom (continued)

Phase	Description
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> As things were not working all around him, Tom examined the scripts that governed his life. Part of this questioning revolved around his distance from prior engagement with diversity and with diversity and inclusion efforts. Tom also processed his feelings of anger and feeling not listened to, in order to come back to a learning place. He believes that a person must be able to “sit and take the negative feelings,” in order to truly learn or get the point of developing new insights.
Recognition of shared discontent/community	<ul style="list-style-type: none"> Tom’s cohort was a supportive place for him to share his thoughts. They did not particularly challenge each other, but the support was palpable.
Critical reflection on assumptions	<ul style="list-style-type: none"> Tom has reflected both on his operating assumptions as he entered the program and on his understandings of how and why people end up with the outcomes they do.
Trying on new roles	<ul style="list-style-type: none"> Diversity champion. Tom has been a vocal and visible champion of diversity and inclusion efforts at the college. He feels supported by his supervisors in these efforts and has done some tangible things to further efforts at the college and being part of the cohort that created a diversity monument at the college. He is also bringing up the conversation at every opportunity he gets, such as with new employees, which is significant, because he is a White male raising diversity issues.

Mapping to Bennett’s (1993) developmental model of intercultural sensitivity. Tom’s initial results, and some of the comments he made during the early stages of the Non-traditional Diversity Training Program, placed him clearly in a stage wherein he was mostly unaware of difference and the impact of difference, denial. He is now clearly at minimization, a stage wherein the focus is on common humanity and unity. He spoke extensively about love and relationships and how the answer is education, since knowledge cannot be taken away. In a sense, he assumes that if everyone gets an education, they will have the same opportunities he has had, which research now shows is the case. While Tom does not yet exhibit an ethno-relative orientation, he has grown tremendously from his starting point and provides an example of transformation, as he progressed two orientations.

Summary. Tom experienced a transformation of a point of view. He encountered people of color through the readings and learning in a way he could not before, even when an African American man lived in his home, because he was now in a place where he could stop being so distant; the historical context surrounding current societal disparities was incredibly profound for him. He is now convinced that some groups never really had a shot at success

and is committed to doing his part to create equity. In terms of personal *antecedents of transformation*, Tom learned the values of equity and justice from his immersion in a specific religion and reached the end of the utility of his self-protective script; these were two critical contributors to Tom's learning. His willingness and ability to return to the table, even after he had a negative experience, were also instrumental in Tom's learning. *Programmatic facilitators of transformation* included challenging content about historical and societal causes of systemic inequities, a supportive cohort, supervisor support, the time to wrestle with the material, and the requirement that cohorts do something institutionally, all of which led to his continued engagement in discussions and efforts after the program that allowed Tom to further reflect and learn.

Interview 7: Katie

Katie is a multicultural woman who presents as White; she is in early middle age. Like several of the other interviewees, Katie was born and raised in [a small Northeastern state] and is a long-term employee of [the small private Northeastern university] where she obtained her undergraduate degree. She considers herself a small town girl and believes she has been able to have many adventures, condensed within the state boundaries. She likes novelty and enjoys the constant change in her work, so she does not get bored.

Katie's upbringing is fascinating, because she has a father from a specific religious heritage and a biracial mother, yet her family never made those things a significant part of her identity. She presents as fully White and did not mention her multicultural heritage during the program, until she completed her final journal, where she shared her mother's Asian heritage. She did not mention that her father was a member of the specific religion, until the interview. She shared during the interview that insecurity and introversion kept her from sharing these things.

Yeah, I mean the time, it wasn't right or other people had just shared so much like I felt like we just needed to move on and I didn't want to like have another story. . . . You know what I mean? Like, I just felt like my timing, because it takes me a while to get the courage to say something. So, it may take for six people

speaking before I feel comfortable and so by the time I'm comfortable I'm like, "Ah , the time's kind of passed. It's kind of too late." So, that's the reason, it takes me a little while.

Katie grew up socioeconomically privileged and was surrounded by families and friends of similar means, so she feels she lived a sheltered life. Her family did not mention difference or diversity, and she believes she was raised to treat everyone equally. After the interview, she reached out to her parents to ask about their decision to not focus on the diverse ethnicities and cultures in their families. Her mother's response was what Katie expected; her parents chose to emphasize the power of focusing on people as individuals and not as identities, affirming Katie's worldview, as she believes their approach helped her become the accepting person she has always been. Interestingly, when she raised the conversation with her sister, she got a very different response. Her sister felt robbed by not being immersed in her father's religious heritage and is now very immersed in it and is raising her two sons in that culture.

Participation in the Non-traditional Diversity Training Program. Katie participated in the program because her former boss, who had participated in the program, mandated it. She was actually very nervous; she said, [My] former boss, put it in my review . . . to participate, so I was kind of told I had to. . . . I was very nervous about it and she kind of threw it in my review and said this would be good to do, get it done, do it. . . . [I was nervous] because, like I said, I felt like I grew up so sheltered like we didn't talk about diversity or differences. I didn't know how the conversations would go, I didn't know if I would feel, um, now that I know, privileged. I didn't know how that would look to other people if other people weren't that way. Um, so mainly insecurity issues with myself made me nervous because I didn't know if I opened up how I might be perceived by others, um, but I wanted to be honest. So, you know, so it was kind of the, the weighing of okay, how much do I open up and let me go in? And so I was mainly just unsure and nervous. . . because I realized I grew up privileged, and you know, all my friends were privileged. And yeah, so I was just nervous to do it.

Influential aspects of the program. While Katie shared that she has always been an open person, because of how she was raised; she believes that the program changed her perspectives, making her more aware of the complexity of actions, motives, and identities.

I think so, um, not really my beliefs because I've always believed that people are treated equally like it doesn't matter what you look like or what you believe or what not. So, like, I don't think my beliefs changed, but I think my perspective changed.

I would hear something, like that's an example, you hear something on the news or you see something happen in front of you, and I just kind of let it roll off before. I wouldn't have two thoughts about it, and then after the program like the littlest things, like I'm more in tune, like I just notice things more, um, or try to understand things a little deeper than I would before.

Katie also believed that the program helped her understand what privilege was and the multiple levels of privilege; she also learned that she had even more privilege in her life than she had previously thought. She believes that the videos she saw during the Non-traditional Diversity Training Program were a very impactful part of her learning process.

I think the parts of the program that resonated the most with me were all the videos. Um, so anything video-related hit home to me, and more than just discussion necessarily, um, I really liked, you know, just having you, like say, someone could feel this way or this type of group of people feel this or you know just you saying it as one thing but seeing the emotions, seeing real . . . or hearing real life experiences, um, that really made it true for me and really opened my eyes more than just talking about it. Um, so all the videos, um, anything we watched really made a difference and I'm a very visual person.

That's how I learn anyway, um, so I know that's my learning style. Um, but I think there's something to say about seeing emotions on someone's face and hearing someone talk, you know, from experience, than

just having an open discussion necessarily. So, the personal program that we touched based on things like that, um, resonated with me more.

Um, I don't know. I think the structure [of the Non-traditional Diversity Training Program] was good, but I also know [my cohort's progression] was very condensed. So, um, I don't know how it really differs, but, um, I would say just, you know, keep the videos, keep the real, what I consider real life um aspects of it so that people can really see and hear people's voices um and maybe have more conversations around various videos and things like that. Um, but all the discussion were good; all the readings were good. You know, it was all good, but I think the visual is a lot higher on my scale of impact for me.

Katie also had an experience at her child's daycare while she was attending the program, which helped open her eyes to some of the lessons being shared during the program.

Yeah, so, um, the moment, so the moment with my [child], so more of a personal moment but has to do with being in the program at the time. So, when, um, I guess [my child] was three, maybe about three, um, at daycare and another [child with the same name as my child] came into . . . class, but the new [name] was Black and the three, two- and three-year olds couldn't remember last names to distinguish between them, so they started calling my [child] "White [name]." So, that moment while I was going through the program was a real shocker and a real eye opener because again growing up in not a diverse, you know, community . . . or classroom or anything, um, having no friends of color, um, that was like crazy to me [laughs]. It didn't faze [my child], didn't bother [my child], but I also don't know if the kids truly understood what they were doing at that age, you know.

Um, so I wasn't hurt by it or anything, but I was definitely taken back by it. And, um, that while doing was just a kind of stop in my place, like what's going on? Like how this has happened? Um, in [the] day care is actually very diverse which I like . . . because [my child's] getting exposed to differences that I never had especially at such a young age.

Um, and so I love it actually, um but I was just like what? How does that happen? And I didn't know like if I should be angry at the daycare for like not stepping in but you know they tried to fix it by teaching the kids their last names, but the names were too hard, and you know it was just that's how the kids could do it, distinguish between two individuals is by their color.

So, they're two or three years old; I mean, no harm at that point. So, eventually they grew out of it and now he's just known as [first name, first letter of last name] but yeah, that, that was the moment, while doing the program that I was like wow. It's very eye opening.

Yes, so I did multiple times, I tried to have [a] conversation with [my child about the incident], and [my child] just didn't get it. . . . Um so I attempted it like three times, my husband and I talking to [our child] about it, um, and then we waited quite some time before broaching the conversation again. And you know, we tried to use like the TV because one of the cartoons [our child] watches had different colored people and everything, and um, [our child] just didn't get it. And then all of a sudden, [our child] realized the difference, and said [our child] was okay with it and [our child] was good and it was fine. Um, and [our child] got it.

The experience caused Katie to reflect on the different paths these two children with the same first name might take, by virtue of their different circumstances, which in part have been and will be determined by the color of their skin. It was a real-life moment that served as a connector to issues being discussed in the Non-traditional Diversity Training Program and enhanced Katie's learning.

Mapping to Mezirow's (1997) phases of transformational learning. Katie presented an example of how her new perspective has impacted her behavior:

Um, so I think, yeah, my perspectives definitely changed, and I remember during the program, um, my husband and I were in a car one day and we drove by this car that was stopped on the side of the road and it had two cop cars and they had um three, two or three, I can't remember, exactly, but there was, um a Black gentlemen standing outside of the car and [my husband] made comments, and he's not racist.

He didn't mean it, but it set me off, and I shut down for the rest of the night. I did not talk to him and he was like, "What did I do?" And I was like, "You can't assume or make judgments or make comments like that because of the color of their skin." . . . "I mean we had a child, like in the back seat, like you don't know it he's picking up." You know so, like I was so pissed [laughs] and I shut down and I did not talk to him for the rest of the night because like things just I notice comments more or things just kind of ping me all of differently now than they did before.

First of all, I'd be like whatever but I was just like, "Really?" Like what's wrong with you? So, you know, I think my perspectives has definitely changed and, you know, maybe not so judgmental and, you know, just being more open and, um, open minded and realizing not everything is what it seems and things like that. So, I think that's how my perspectives changed but not necessarily my beliefs.

This incident definitely spoke to Katie and inspired her to examine how she feels about acts of exclusion, and therefore, how she acts in response to these events. She described effective bystander intervention. She could have let things go, because the parties being spoken about were not within earshot and could not do anything to Katie, but she chose otherwise, for her child and because of her heightened state of awareness.

Katie was also an integral part of a group of members of her cohort, who decided to do something tangible and created a piece of art made up of a word cloud, featuring words related to diversity and inclusion. Interestingly, while Katie shared multiple times that her beliefs had not changed, in fact, it appears that some of them have. Katie has always believed in the value of people, but she was raised to believe that differences do not matter. Now, she seems to understand that differences do matter and have an impact on people's life outcomes. Table 11 illustrates Katie's transformative experiences.

Table 11. Phases of Transformational Learning Experienced by Katie

Phase	Description
Disorienting dilemma	<ul style="list-style-type: none"> Personal experience with her child's daycare provider during the program. Katie found her child being called White [name] jarring, because she had been raised not to focus on difference. The experience got her thinking about how the racial boxes these two children lived in might shape their lives.
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> Katie has explored the reasons why difference was not mentioned in her family growing up and has reflected on all the privileges she has experienced in her life, with some nervousness.
Recognition of shared discontent/community Critical reflection on assumptions	<ul style="list-style-type: none"> Katie felt that discussions were helpful, especially the ones related to real life issues. Katie has reflected on privilege and the many ways people have privilege. The videos also provided an opportunity for her to think about the external circumstances that impacted the outcomes of those on the margins.
Trying on new roles	<ul style="list-style-type: none"> Bystander intervener: Speaks out when biased comments are made.

Mapping to Bennett's (1993) developmental model of intercultural sensitivity. Katie's initial results showed that she was at minimization, affirming her openness to others. However, at minimization, people exhibit an overemphasis on commonality. Katie's comments revealed that through the program, she developed a deeper understanding and appreciation for difference and its impact, an appreciation of how privilege shapes outcome, and more sensitive attunement to discriminatory actions and speech, and she chooses to respond to it when she can.

Summary. Katie experienced a transformation of a point of view. Her previous feelings of openness and treating people as people were specifically crystalized towards understanding privilege and the experiences of those who are less privileged, leading her to become an ally in absentia, responding to perceived bias expressed by others. In terms of *personal antecedents of transformation*, Katie's upbringing was probably the biggest facilitator, because her family taught her to value humans as humans. Even though her family deemphasized difference, she did grow up around it, making it harder for her to absorb societal narratives about people from her parents' religious or ethnic heritages, since these identities were part of her family and part of her heritage. In terms of *programmatically facilitators of transformation*, the visual elements of the program, such as videos, were the most impactful for Katie. She also

appreciated the readings and discussions. Finally, the opportunity to process the experience she had with her child in the program, and through what she was learning in the program, was valuable.

Interview 8: Margie

Margie is a White middle-aged woman. She is a long-term employee of the small, private Northeastern college and works in a business operations function, with a passion for excellence and perfection. She is detail oriented and likes things to fit neatly in their places. Her drive shows up differently from traditional ambition, as her focus is on doing things right and serving the customer, rather than climbing the corporate ladder; as she says, “So, I’ve been doing [business function] for [a significant length of time]. And, um, I really enjoy, you know, the detail, the numbers, working with people. I like things being black and white, everything balances.”

Born in a non-U.S. country, where her father worked for about five years after he earned an advanced degree, Margie’s family moved to [a large Northeastern state] briefly and then to [a small Northeastern state] when she was three, and she has lived there ever since and obtained all her schooling there. As such, she regards her upbringing as pretty sheltered and was unaware of how prejudice showed up in many situations. She feels fortunate to have been in environments where people were regarded as individuals, regardless of what their backgrounds or identities were.

Margie has always been curious about and respectful of difference, pointing to her admiration of the multilingual ability of her best friend, who is from China, and describing a colleague as a man who happened to be gay, as opposed to as a gay man, putting his personhood before his gayness. She appreciates this orientation and the fact that she did not witness a lot of discriminatory incidents, although she realizes that this sheltered experience also meant that she was unaware of much that goes on in the world.

Margie has spent her life battling insecurity, which she recalls as part of her earliest memories:

Probably comes down to insecurity too, you know. The other thing, too, I don’t know if I mentioned this in my journal but my [sibling] had a brain tumor when she was [age]. So, I had to deal with that; my parents were at the hospitals with [my sibling] for five, seven years all over the place, you know, and I was actually

in counseling for a while, because of the survivor regret or the survivor... Well, I will say it affects most everything in my life, and it probably always has.

And I don't know where it comes from, but I remember it even probably from my earliest memory. Part of it is being a shy person, too, and it all kind of ties together. . . . You know, I remember my parents would, or my [mother] would drop me off at the [youth center] for swimming or gymnastics and I always had this fear that she wouldn't come back and pick me up.

It goes going back to like age four and five. So, I've no idea where that comes from, but I know it's always been there, and I've always... So, it's been there and I've always been fighting against it and there came a point when I began, probably back to [a number of] years ago when I started here. I became more accepting of it and trying to work with it and manage it better. Like I said, taking the classes and trying to become more of a little bit more outgoing of a person, and sometimes showing confidence even when you didn't really have it. But realizing that even doing that makes people accept you better because not really letting them see who you really are. Not that people don't, but I don't know if that answers your question or not.

Margie participated in classes and other forums to help her overcome her shyness and build confidence, and some of them, especially the ones focused on interpersonal and intercultural communication, began the process of opening her eyes to see the negative ways people are sometimes treated because of their identities. The positive experiences she had involving generational differences in these classes, facilitated by an excellent instructor, gave her the confidence she needed to take the Non-traditional Diversity Training Program.

I thanked her for helping me and it was just, I think it couldn't have been very different if I had been in the class where I had been very kind of ostracized, but because it was so, accepting, all the students, it just really encouraged me to do more. So, which is why I had last, I wasn't really fearful of taking this class [Non-traditional Diversity Training Program], which I wasn't, and I was really looking forward to it actually, and it

lived up to my experience and expectations because everybody in this class as well was very supportive and helpful.

Margie also places a high value on being disciplined, planning for the future, and being self-reliant, things that can be tied to the experience of her sibling's illness.

You know, and part of it, too, made me realizing that things can change like instantly, overnight. So, you always have to be planning, and, but also, you know doing things that, to be successful, you know, you have to keep planning, but you also have to, also try to be in the moment, to try to do both.

Margie tries to stay in the moment by engaging in stimulating conversations with a lot of acquaintances, but because she has a hard time trusting, she has a very small inner circle, with her former partner and current housemate as her closest confidant and friend. The result of this situation is that Margie leaves a lot of things unsaid. Part of this inability to trust may stem from the fact that Margie witnessed her friend's parents go through a difficult divorce, with devastating consequences for her friend. Her own parents also later divorced, leading her to conclude that having not seen marriage work out, she would be better off not getting married herself. She remains unmarried and has chosen not to have children.

While Margie enjoys conversation on a wide variety of topics with this outer circle, religion has been the area has been an area where she has been reticent to engage, because her desire to do things right or perfectly extends to her conversations. Religion was also the source of Margie's first experience with exclusion:

Just because I don't know much about religions. So, it's not a topic that—I sometimes like I try not to say anything because I don't really have the education to be able to have a conversation, but I did tell my co-workers, when I was up in [building on campus] that I hadn't been baptized. . . . They were, it was no big deal, but what happened was there had been a work study student, a student working there, and she went home for break and after break, this happened before break she wouldn't talk to me.

So, I find, I'm like co-worker who works up at the front desk with us, "Hey what's going on?" And she's asked. So, she asked she and she said, "Well, I told my parents that you haven't been ...," that she worked with somebody that hadn't been baptized and they told her that she shouldn't talk to me. So, I'm just like, "Whoa." So, right then that was my first real, um, actual, personal....

Participation in the Non-traditional Diversity Training Program. Margie engaged in the Non-traditional Diversity Training Program because she is curious and likes to learn, especially about other people, cultures, and experiences:

I love taking classes and I actually wish I had time to take more classes and that's one of my goals, is to start taking more classes. And because I had taken some of the intercultural classes and interpersonal ones, I find those really fascinating. I get to learn about a lot of cultures that I really knew nothing about, and actually religion is one of the other areas, I would like start learning more about too."

She was also supported and encouraged by her department to participate.

Influential aspects of the program. The program continued the learning that began in the earlier interpersonal and intercultural classes Margie had taken. Margie spoke about a new level of awareness:

I guess it's just a whole awareness thing that I just become more aware of how people are looking at everybody else and interpreting different, you know, cultures and differences and things like that, and I guess the other thing too is after [the Non-traditional Diversity Training Program], I started, I used to read through the papers and I'd skim a lot of the articles. I find myself reading more of the articles just to really notice how much more often things were happening in the world that were affected by differences that I guess I really hadn't paid attention to. So, like I said it's just a really huge awareness.

An experience that really stood out for Margie during the program, was the "other culture experience" exercise.

Participants had to pick a setting where they would be the other or the minority. Margie partnered with a colleague to visit a homeless shelter. The process turned out to be a pretty impactful one for Margie.

Moments in the program? I can answer that the first time, I mean right off. So, maybe the most difficult moment, . . . but anyway the moment that stands out the most was when we were required to do the project, where we had to put ourselves in a situation, and [other participant] and I went over to the food shelf, and I think you had said that we didn't actually have to go to the food shelf. But [other participant] and I were talking, and I actually said, I said, "I think we should actually go," and neither one of us really wanted to, but we kind of both felt that it would be the best way to really experience being out of our comfort zone. It certainly was, and it was kind of weird juxtaposition because so, [the other participant] drove. So, we are driving there in [other participant's] newish car, and we're like well, you have to park a couple of blocks over and walk there before you really get into the....

So, I was like so you're taking these two really privileged people, putting yourself in their situation. So, we walked over there, and you know we hesitated going in, and it's like, well how where do we go, how do we get in there, are we dressed okay, because we didn't want to look too out of place. So, it made me really think about what if I was really a homeless person? Let's say I had just become homeless or I just moved to a new place it's like, I would be thinking all of the same things. . . . Where do I go? Do I look okay? Are they going to accept me in there? Are they going to feed me? Or what are they going to feed me? It doesn't matter if it's me, or a real homeless person.

It made me really put myself in their shoes and say, "Well, just because you're homeless doesn't mean, that doesn't make you have all these anxieties about it, you can be anybody, and still have all these anxieties." The homeless person has all these anxieties on top of all of these other things. So, we went in and you know, we tried to sit next to people, we would try to have, you know, them say something to someone and that didn't really work, they didn't acknowledge us . . . but you don't know if that's because that's who they are, or because it was us. So, we just, so, anyway it was a very eye opening, and it just made me realize that everybody has issues. It's just that some people have a lot more.

You know, it really, I'd never ever been in a food shelter before, and it does, it makes you want to reach out and help, try to help those people to not have to deal with these horrible situations. . . . So, and anytime I see the different events going on going on that help different causes and things like that, I'm much more inclined to jump in and help them, because, you know, you do see it from the other side, and that's just, even though you're really not on the other side, at least seeing it a little bit more. So, now I think that was my biggest moment because it just made me feel so, not what I used to.

With things like when we did the community service event last month, we were working down at the gardens by the [a different college in town]. So, we worked on the gardens, which is part of it, but then he says, "They'd just taken over this park, the city of [small, Northeastern city] had. There is this homeless shelter right next door to it that we now own that we want your help cleaning up." And my first reaction was, "Okay, great we need to get this cleaned up and we'll do this," but most everybody else in the group was just like, "Aaahhh! You want us to help cleaning up this homeless shelter?" They weren't very thrilled about doing it, and you could really see that they really, um, either didn't agree with the homeless living out there, [thought] the homeless shouldn't be living out there anyway, and we shouldn't have to clean this up. And so, I kind of said, "Well, you know, they were living out here and they have obviously been forced out of this place because the city bought it. So, you know, the least we can do is go help them clean it up."

So we went over there and cleaned it up, which was fine until I pointed the poison ivy then it kind of fell apart [laughter], then from there but people who we were getting into it...putting everything in bags and things like that. But the other thing was, you know, like, is we were picking up, like there was this big book of poetry and that I picked up, and we had gloves on and everything, but I picked it up and I'm thinking, "Well, here is this homeless person sitting here in the woods, nothing to eat, probably drinking, but reading poetry." And it just kind of made of them seem more human to me and understanding that being homeless

isn't really always a choice; it's sometimes just happens. They are still people. So, it did make a big impact on me.

The experience of visiting the homeless shelter helped make the homeless human to Margie. Vestiges of her previous narratives about the homeless remain, as evidenced by the drinking and gloves comments, but central now is their humanity.

Mapping to Mezirow's (1997) phases of transformational learning. Margie can point to ways that this new awareness or lens has impacted her behavior. She spoke about her efforts to bring attention to the way people are being negatively treated, citing a specific example of a colleague of color who was suffering a crisis. She took the colleague to the hospital and found that the attendant would not make eye contact with the colleague, asking questions of her instead, even though Margie had made it clear that while the crisis was making it hard for the colleague to talk, she could write. She wondered if the inability to speak or the colleague's race was responsible for the dismissive treatment. She also spoke of her efforts to connect specifically with a student worker of color from a low income background. In the past, the student's inability to meet the high standards would have been cause for dismissal. Now, the team is trying to figure out what might be responsible for the poor performance, and how to holistically support the student. Always generous, Margie has been even more so after the project she embarked on as part of the Non-traditional Diversity Training Program. Her project involved visiting a local food shelf for a meal with the homeless. She emerged from the experience seeing the humanity in the homeless, giving to homeless causes, and advocating for the homeless when others treat them badly. Finally, while she acknowledges the privileges she carries, she also reflects on times when she might be treated in a discriminatory fashion, because of her gender for example. Table 12 illustrates Margie's transformative experiences.

Table 12. Phases of Transformational Learning Experienced by Margie

Phase	Description
Disorienting dilemma	<ul style="list-style-type: none"> • Margie’s visit to the homeless shelter was an eye opening experience that has resonated with her.
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> • Her learning in the program made her think back on past experiences. She now wonders if there were acts of bias that she did not notice in high school and whether she is sometimes treated differently because she is a woman. She also has an awareness of her privilege. • Emotion was not a huge part of Margie’s experience, probably because she is so guarded.
Recognition of shared discontent/community	<ul style="list-style-type: none"> • Community was an important part of Margie’s learning. She really appreciated having great conversations with her cohort members, especially the participant with whom she got close and visited the homeless shelter. She felt she could have open conversations with this participant, who was deeply religious, about religion with no judgment on either side.
Critical reflection on assumptions	<ul style="list-style-type: none"> • Margie’s perception that homeless people were lazy or deserved to be homeless were challenged by her visit to the homeless shelter. • Her experience of vulnerability on the visit to the he homeless shelter, made the homeless human to her.
Trying on new roles	<ul style="list-style-type: none"> • Stepping into a role as ally and mentor. • She sought to connect with a student employee of color, who was underperforming. As a person who is disciplined and focused on excellence, in the past, she would have dismissed the person without a second look. However, her new awareness made her seek to find out more and see if she could help. • She now advocates for the homeless and gives to nonprofits supporting the homeless, even as she continues to hold on to some stereotypes of the homeless as drinkers. • She also stepped in when her colleagues got mad about having to clean up a homeless tenement and tries to force people who treat others badly to do better by making them recognize their actions.

Mapping to Bennett’s (1993) developmental model of intercultural sensitivity. Margie’s cohort in the Non-traditional Diversity Training Program was the only one that did not take the Intercultural Development Inventory. However, her description of her paradigm before the program reflected a tendency to see people as humans, which is indicative of minimization. Her embracing of the humanity of the other places her at later minimization, while her willingness to consider that there might be a variety of reasons that might result in homelessness or an underperforming employee hints at the beginnings of ethno-relativity. Margie is reflecting an orientation at the end of minimization and cusp of acceptance.

Summary. Margie experienced a transformation of a point of view. Her default orientation before the program was to see people as humans first, and through the program, she has extended this view to new groups with whom she did not have extensive prior experience, namely the homeless and people of color. In other words, her existing habits of mind have now been applied to new groups. In her encounter with the homeless, she saw their humanity and began to reflect on experiences of bias she might not have noticed before and to allow for other factors that might be responsible for people's being homeless. Examples of her behavior, including working with an underperforming student of color and standing up for a colleague of color at the hospital, point to her developing a point of view about people of color as well.

In terms of *personal antecedents of transformation*, Margie did not have many prior experiences with diversity before she started taking classes and participated in the Non-traditional Diversity Training Program; however, her relationships with the few nondominant people (her friend from China, and a man who is gay) she encountered were positive, as were her experiences in the classes she took. These interactions supported her curiosity, learning orientation, and openness as she approached the Non-traditional Diversity Training Program. Her learning in prior interpersonal and intercultural classes also primed her for learning in the Non-traditional Diversity Training Program.

Programmatic facilitators of learning for Maggie included the "other culture" experience. Supportive community was also a big part of Margie's learning, especially the connection she formed with the participant with whom she went on the other culture experience. Margie felt supported and included by her fellow participants and enjoyed her conversations with them. Emotion was not a huge part of Margie's story, although she alluded to some discomfort associated with the other cultural activity. It is also highly likely that Margie's feelings of insecurity and the sense of vulnerability as she entered the homeless shelter collided and further opened her up to learning.

Interview 9: Sophia

Sophia is a White woman in early middle age, who works in a business operations function at the small, private Northeastern college. She was born and raised in the same Northeastern state, completing all of her education there. She describes herself as comfortable with compliance functions, and this focus has served her well. After completing college, she secured employment at a prominent firm and worked her way up to a senior role, before moving to the small, private Northeastern college. Her move to the college was strategically planned, as her experience in higher education convinced her that higher education was where she wanted to be, because of the community feel and the values that representatives of higher education espouse. Through her work with multiple institutions, she was also clear that [the small, private Northeastern college] was where she wanted to be. With her goal clear, she moved from working in both the utilities and higher education industries to focus solely on higher education and kept her eyes focused on job opportunities at the college.

When an opportunity arose, she already had established relationships at the college, and she leveraged those to get the position, coming in as an administrator and moving into a higher level role a few years later. She is proud of her accomplishments and emphasizes the roles she has earned as she tells her story. She was attracted to this college, because she believes it espouses her values:

I mean, caring for and trying to advance them specifically professionally and not the student population. So, for me it's that human touch behind, it's not a number, it's the person. I feel like [small, private Northeastern college] really has that and focuses on that. I think part of these efforts, part of the diversity and inclusion efforts kind of hone in on that.

You know, [small, private Northeastern college] wants to do right, wants to do right by people. Everyone wants to do right by people and how do we get there and how do we do that? So, I think that I value integrity, trust, family relationships, and I feel like [small, private Northeastern college] is very supportive of those values.

According to Sophia, her exposure to difference has been quite limited. She has been fortunate, as a woman in a technical field, to have been surrounded by and mentored by women. As such, she cannot speak to personal experiences of gender discrimination, although she has noticed it at higher levels with her supervisors. As a person committed to self-awareness, Sophia is almost hyperaware of her lack of exposure in the diversity and inclusion arena:

So, I think one thing that I took away from [the Non-traditional Diversity Training Program—and the reason that I am saying I took it away is because my perspective before was quite limited—I still think it’s quite limited in the scheme of things when I compare myself to other people who have different situations and just more diversity afforded to them based on where they grew up and what their background is.

So, I would say, I felt like I was a really open person who diversity wasn’t an issue for, right?

Because I am open to it and I am inclusive and I think, eh, what [the Non-traditional Diversity Training Program] taught me is that I was not as far along on the spectrum as I thought I was.

Participation in the Non-traditional Diversity Training Program. While Sophia’s workplace leadership encouraged her to participate, she did not mention that encouragement as a reason for her participating in the program. She rather focused on her desire to work on the “blind spot” she felt she had related to diversity and inclusion:

I really wanted to, I am a pretty self-aware person in general but I don’t feel self-aware on the diversity spectrum [with regard to diversity and inclusion issues] as I do with parenting or how I am approaching work or technically. Like if I do my performance review, I can give you every self-critique in the book. I feel a little bit more like I have a very blind spot when it comes to diversity. I actually wanted to participate in it much earlier than I did. Probably two years earlier than I did and the struggle was just finding the time in our schedule, and then I think I was on . . . leave, too. . . . So, I wanted it was more for a self-perfection and personal growth than anything else, and just having the space for that and learning from others.

Influential aspects of the program. The program challenged Sophia's views on where she fell on the diversity continuum and gave her a richer view of diversity:

I think I have gained more value in what difference and diversity bring, before I was open I would say more receptive and looking for it now, versus just if it comes by, if that makes sense? Since [the Non-traditional Diversity Training Program], I feel like I have a different appreciation for it and I can understand the struggles of the people that's it's happening to. I am more empathetic than I was before, and I am like how can I get involved and be an ally versus it doesn't affect me, so I can kind of just shut it off.

Sophia admitted that she is not where she needs to be and still struggles to do what she desires to do. She said,

I am still, I mean I am still working on that because it's still somewhat of a barrier to me, I don't necessarily feel comfortable, just, what's the word I am looking for? I don't necessarily feel comfortable just showing up, like showing up to something that I don't necessarily feel like I am the rel, the party it's representing.

So, like I think the vigil [protesting the Orlando shooting] that went on this past week is amazing and I still so much wanted to go and I am like, but I still don't, I am still kind of breaking that barrier, like I want to support it and I want to be there but it's not like it's a little out of my comfort zone still. Not because of the people that are there, just because I am not in the identified party back there.

But I do think it has changed. So before [the Non-traditional Diversity Training Program], I could easily just shut the TV off and move on. After [the program], I feel like, I am then like, how can I help? How can I support? Not just it doesn't affect me, so I can't just move on.

Sophia credited the hands-on parts of the program, including perspective taking and case studies, as really important to her learning:

I think, so, I really like the hands on, like the case study type work. I love the current events, the ability to talk about that especially because it was going on during the time--was it Missouri? The other ed institutions

and how that kind of makes it similar or different, that we do we have that same exposure and are we further along on the spectrum and what support services do we have so that we don't end up in that situation?

I like the concrete examples, talking about theory is a little bit more challenging, just, and that's my personality and my feel towards experiences is more technical and hands on. So, I really like those; I like case studies; I like the current events ones better than that just the textual ones. And then the conversation, I like the, I really like when there is two sides of the story and if you hear both sides. And both opinions are in this room, because I think that makes far more valuable learning experience, than we all know that was wrong. So, we all agree and we can move on.

Versus having both sides of that story and so you had us with the law surrounding, it was a store that refused to serve. Having like being able to be in a group where you might not have agreed with the opinion but you still had to think about how they got there and what their support was, that was eye opening. Because everybody sat in the room and they all knew something was wrong and they all felt one way about it, but putting them in the position where they had to think outside the box like if you were in this, if you were the owner of the restaurant or the, I don't remember, was that a restaurant? [PI refreshes her memory about a baker who refused to make a wedding cake.] Yes, that's exactly what it was. So, if you are an owner of this restaurant, how did you get like legitimately, there are legitimate ways of how they probably got there based on how they were raised and what exposure they have had and how did they do that. That was an interesting project.

Mapping to Mezirow's (1997) phases of transformational learning. While intent to act, pending increased courage, and self-efficacy might be an apt description of Sophia's recent history, there are indicators of actual action. For example, when faced with two equally qualified candidates, Sophia influenced the department to select the immigrant woman of color, who could add diversity to the office. The candidate excelled, and other immigrant candidates of color have since served as part of the team. Sophia credits a direct reporter and one of the other

participants, who works in Sophia’s department, with helping to intentionality encourage these hires. Sophia also pointed to an increased use of “naming” what is happening in a situation and identified benefits beyond the diversity arena. She said, “Not even just from a diversity perspective, but from a management perspective, from a diversity perspective, they are, naming it, for me, um, I am using that more and more because I think it’s really powerful.” Sophia also expressed regret at not speaking up in situations involving her supervisor, because of the politics and power differences at the end. Finally, she expressed a strong desire to be a more visible and vocal ally, although she feels uncomfortable stepping into this role without an explicit invitation from members of the affected group. Table 13 displays a summary of Sophia’s transformative learning.

Table 13. Phases of Transformational Learning Experienced by Sophia

Phase	Description
Disorienting dilemma	<ul style="list-style-type: none"> Sophia did not mention any specific disorienting dilemmas in her learning process. She did share that as a result of the Non-traditional Diversity Training Program, she realized she was not as open or inclusive as she previously thought she was.
Self-examination with feelings of guilt or shame/role of emotion	<ul style="list-style-type: none"> Sophia did not refer to a lot of emotion. She did refer to the fact that she was distant from previous events and could “shut off the TV” because of her privilege. She also referenced another colleague, who said that it was easier to look away than face the pain that comes with looking, but we must look.
Critical reflection on assumptions	<ul style="list-style-type: none"> The program afforded Sophia the opportunity to reflect on privilege and the experience of those with less privilege. She gained an understanding of context and factors that could be impacting a person’s outcomes.
Shared discontent/role of community	<ul style="list-style-type: none"> Sophia appreciated having multiple perspectives in the room and the exercises that encouraged participants to take multiple perspectives on an issue, regardless of their own personal beliefs.
Trying on new roles	<ul style="list-style-type: none"> Seeking to be an ally. She is mentally there and is seeking permission/invitation to begin to act.

Mapping to Bennett’s (1993) developmental model of intercultural sensitivity. Sophia’s initial Intercultural Development Inventory score placed her at the end of polarization/cusp of minimization. Her interview conversation places her at late minimization; she is able to empathize with the pain of others, they have become human to her, she is aware of her privileges, and she is beginning to seek opportunities and courage to act, and she

acted in at least two instances when she was provided with the opportunity to do so, both related to hiring candidates of color.

Summary. Sophia deepened an existing orientation or openness to difference by focusing on the humanity of others and developing increased empathy for their struggles. As such, the program helped Sophia amplify an existing point of view and apply it specifically to underrepresented groups, meaning she also learned a new point of view. She also alluded to the potential transformation of a point of view with her comments about not being able to turn off the TV and walk away and her desire to be a vocal and visible ally.

In terms of *personal antecedents of learning*, Sophia's commitment to growth and self-awareness and general openness to difference were facilitators of her learning. In terms of *programmatic facilitators of learning*, concrete activities including case studies and exercises that required participants to take an opposing point of view, regardless of their personal beliefs, and community member sharing were facilitators of Sophia's learning.

Interview 10: Stella

Stella is a mature, White woman. She worked at the college for several years, serving in a variety of support operations, before she became a member of another participant's department. Stella's primary focus in her final role at the college is customer service, and this function is what she considers the core of her job:

Um, I really do enjoy my job now, it's a skill set that's comfortable for me. But what I really like is customer service, that's the part I've always loved about the positions I had was being able to provide good service.

You know, pointing to, like, customer sites and training them on their equipment explaining why something happened and how to avoid it. Or fixing the problem for them, just interacting with them was engaging and enjoyable. Now I still get some interaction with parents and a little bit with students. But mostly faculty and staff. But I really do view my role as customer service. I'm helping [others in a variety of tasks]. So, that's sort of what drives me.

Stella has had a rich life that reflected resilience and adaptability, supported by her decision to take a new position late in her career, because she was not feeling challenged or empowered on the job. Stella's father was a farmer in a Northeastern state, and her mother was the child of an upper class family, who lost her access to wealth because she was a woman at a time when inheritances followed the men. While Stella's siblings were alive, they financially provided for her mother, but she did not receive a nest egg, and her siblings died within two years of their father, meaning that the money went to the siblings' families. Stella's mother had to adjust to reality as a farmer's wife, which proved to be quite a culture shock.

Well connected to, and proud of, her family's history, Stella also spoke of the impact of her paternal grandfather's . . . ethnicity and his . . . immigration to the United States and the role of ability, gender, and socioeconomic status on the lives of those on her mother's side of the family. Her maternal grandmother, who was born in the 1800s, lived next door to Stella's family. She lost one of her hands after an infection, but the family performed a remarkable norming of this condition. Stella's grandmother's brothers had insisted that she build a life, rather hide from it, in spite of her disability. Stella's grandmother never talked about her disability, but she compensated for it by always being "put together." This keeping up of appearances might have contributed to Stella's grandparents telling her mother to "never again" bring home a Black roommate. Stella juxtaposed that experience with growing up working in her grandfather's store, where she had been told in no uncertain terms that when an older Black lady came to visit, Stella would take her home, even if she had to close up the store.

Stella lost her father when she was [age] and had to drop out of college, because her family was too wealthy for her to receive financial aid. Unable to afford school, she joined the military, because they paid for college. Stella never actually completed a four-year degree, but she did receive credit for her coursework and work experience, resulting in the granting of an associate's degree. Military experiences exposed Stella to significant racial diversity, primarily Black people, where she worked in the Washington, DC, area. She shared the fact, that while her military

service was different than her experiences growing up in [a Northeastern state], her orientation was to treat people as people, and not as a color. She illustrated this statement with a particular example.

So, I guess I never, it didn't even really register so much to me. They were just my co-workers. So, I remember doing things like, I had a friend in the Navy, who was a White female, and I was working second shift. We rotated on the second shift, and I was working with this older Black woman, . . . I remember that.

She was taking the bus home at night, 11 o'clock at night. A woman my mother's age. I was like, "No, you're not taking the bus, I'll drive you home," and in fact, she was one exit before my exit. It wasn't even like I'm in the way and my friend was like, "Are you crazy, you drove up into that neighborhood." I'm like, "Yeah, you think it's safer for her to be walking home at night than for me to drive and drop her off." It just, that just didn't make any sense to me then. I had and she's like, "You understand that that's like a Black neighborhood and blah, blah, blah." I was like, "So?"

That didn't register to me; I didn't know what that could mean or might mean. It just was like, no this is, she's my mother's age, there is no way I'm letting her ride the bus at night if I can give her a ride. It just didn't make sense to me, and I credit my parents.

These life and personal experiences showed Stella the complexity of identity and social experiences. Stella also learned about difference in her efforts with her children. She served as an advocate for her child with a learning disability, whose special needs prompted the move back to [the Northeastern state], where he got the support he needed and thrived. She also found that her high achieving child, because he was not challenged by the school system, got bored and lost his way. Her recounting of the issue reflected nuance and, again, complexity:

Well [sigh], at first, the first time I jumped into realizing that [my child] needed more help, was in [a Midwestern state], and there was a large population of immigrants in the area which I didn't, it didn't bother that [my child] was going to school with these kids; that was fine.

Um, but when I learnt that the school didn't have resources for my [child], because they were all diverted to these other kids. . . . I was like, well that's fine, but my [child] needs help, too, and I couldn't get any help and they actually told me, they wouldn't even test [my child] until 3rd grade. I was like, I've worked hard with my kids. My other [child] was reading post high school level by 7th grade. You know, I read to them; they read. We read at home, we do this, you know, and [my child] was struggling, really struggling, and I knew both my [siblings] had—at the time they diagnosed everything as [a specific disability].

But I knew that it was a dominant trend that ran in my family, and I was aware that [my child] was struggling. [My child] really liked school still, and I wanted [my child] to continue to like school. So, that was the impetus for us to move to [the Northeastern state]. Then I've come to realize that not just kids that are struggling, but maybe kids that are excelling really need, they need specialized attention. They need to be engaged and the school system wants to do, everybody has to fit into this mold. I was so frustrated by that. So, [my child] got help and flourished by high school, whereas my smart kid was in school, I hated it. Just about barely got through high school at the end. I was like, this is a kid who was engaged, loved to read, wanted more and all of a sudden he was just...bored, yes. If you weren't good in this, you couldn't do that, regardless. . . . It was at this box and you had to fit in it and you couldn't. There were no exceptions and no. So, in the in the end he was the one that actually didn't get the help he needed. So, wow.

Participation in the Non-traditional Diversity Training Program. Stella participated in the program because her supervisors mandated it. While she had no problem taking it, she remains peeved that her boss and boss's boss did not take the course until many later years, while leaders of other departments went first. It was an indication to her that her department suffered from an unproductive hierarchy and poor leadership.

Influential aspects of the program. Stella believes that the program had a positive impact on her, and she spoke of a change in perspective and a willingness to support equity:

It did, it absolutely did. First of all, you know, the activists, I guess. I always felt like, why is there is so much talk about it, and I felt like maybe if we stopped hyper-sensitizing it, it would die down soon. So, I got a different perspective on that. But that was part of, I was raised with, you never talk about, you just do. You just go and people have to deal with.

That was probably a generational thing, I don't know. So, that was a definite change in my perspective. I understand now why there is a need to still talk about it and move it forward. It's not, and that was a change on women's right. So, in Black rights and every, I mean. Across the board it was a change in the perspective about activism.

Then again I'm still never going to be the one out there at the marches, any march. Well, I took to heart what you said about not everybody starting from the same place. So, in particular we have students that come from different backgrounds and they didn't necessarily get the same educational exposure. Even still we need to find a way to help them succeed and come up through even though they don't necessarily have that initial skill set.

This willingness to meet people where they are and do the necessary work to help them have similar outcomes to those who have had more advantages is a critical attitude for developing equity.

Stella shared that a critical moment for her was when the primary facilitator shared that her experiences in the military occurred in a bubble that might not translate to real life. Upon reflection, especially on the experiences of her friends, she came to realize it might be true.

We had friends in the [military] who were a mixed couple. He was Black, and she was White, and she was actually British, and when he retired and got out of the military community and moved to [a city]. And, uh, his, the group of friends that they hung with, or that they associated with, were mostly Black. She was ostracized and the marriage fell apart. They just couldn't, I don't know, get over it or you know, build the network that would support them as a couple. So, that felt terrible because these were our best friends in

threes. We both got married at the same time, we had our first kids together. You know, we did lots with them. It just was..... heart breaking to us and we're still not sure how they did.

We're not really friends with either of them anymore, because it just felt like how do you pick and how do you like, you just feel like you're, it seemed like betraying one or the other, I don't know. We weren't living near them anymore anyway. But, yeah. So, right, experience was not real life [laughter]. I'd have dug in and said you were wrong till the sky turned pink, but in hindsight and realizing and looking at it like from our friends whose marriage couldn't last outside of that community, and I'm not saying everybody's marriage is going to fall apart. But clearly they were in love and they were very engaged and committed, and it didn't work, and they had two kids. But his family was not supportive. and her family was supportive after the fact, but they were not thrilled at first, and they let that note be known. There was a lot of problems for them. It gave, I actually had think about that, because I was trying to justify like yes it is. The more I thought about, that's the more I realize no, you're right it isn't, it's not the same. I'm the same, but the world isn't the same. So, just because I don't feel any different in my relationships, they were different because of the network and the support that was there.

Not that I feel, we're still friends with different people, that hasn't changed. But how we got there, definitely was not normal. So, that was a turning point, I don't know how you want to say it. But definitely it changed how I see the military.

Stella also valued her cohort community and believed the discussions in that group enhanced her learning, bringing to mind things that she had not considered when she did the readings, providing the safety to delve deeper and supporting her examining issues through multiple perspectives.

The discussions absolutely. Um, I don't know if it was, because we had such a small group. Or we knew we were larger groups, and I don't know what that experience was. But for me I felt like our discussions were

very deep and into, you know what I mean? Like they went where you weren't comfortable to go and it felt safe and you could. I could say how I felt and you could tell me how you felt.

It wasn't about I'm right or you're wrong or, it was just this is how I feel and then it made you think about things different or at least consider them differently. So, that I really enjoy. The readings, honestly I don't remember them. So, it's been a long time, but I don't remember. I remember a few of them sticking at the time like wow. But I can't tell you which ones they were at this point.

Even more like I read them and it wasn't until somebody else would say, I thought that this when I was reading that that it would be like wow and I didn't have that lens to even read it with. So, that was important. So that those deep conversations we had in our group can be had. Because when I've talked to other people, when they have large groups they don't always feel like maybe they were engaged enough. Or had time to be engaged, to say that thing they were thinking about. I think that's what made us so rich was we had, there was time for those. The different lenses, because then when you hear them you can start looking through them. If there's a topic that if you don't have other lens to look through it with, you're still looking through your lens with your lens. So, for me I think that's huge.

Mapping to Mezirow's (1997) phases of transformational learning. Stella has engaged in observable behaviors since the program. Her supervisor, another participant in this study, commented on Stella's actions several times during the course of the interview. Her supervisor said,

I think just what I have seen and my department, [Stella] is an amazing example, just because I have seen her growth since she took [Non-traditional Diversity Training Program] and her ability to kind of just say it as it is. So there are things that I am like, I don't know if that's PC. So, I am not as likely to say it, right? She is just like, "Alright, I don't know if this is okay but I am going to throw it out there anyway."

Having that comfort and ability, like, I love that about her. That's definitely one thing in through [Nontraditional Diversity Training Program] that I also from other people like the people who I feel like are

further along on the spectrum have that quality about them. Well and part of that goes back where I hope to learn from Stella too, like if she has that comfort and that courage to really name it and get it out on the table she then has the power to go anywhere with that.

So, I know Stella is very intentional about it [diversity] when she is hiring. I think we have been afforded just the opportunity of having some of the right people like [a person I recommended] is amazing. I am so glad that it worked out and we were able to take [this person] on.

While Stella did not name these things herself, it is impressive that her supervisor can point to tangible growth and actions that Stella has taken following the program. Stella also shared the example of another unit calling to ask her to give a job to a person with a disability. This event speaks to the fact that Stella is known as a person willing to develop and support others from non-traditional backgrounds. Stella also pointed to situations where she failed to act:

I'm starting to try to be more, when I see something that's not right, I've been trying to speak up and I'm not there yet. But, so once again we had my [child]'s friend was over, spending the week with us, and [the child's friend] went with us to another friend's barbeque. Where there they had a friend that was there, and the girlfriend showed up, and she been at the beach, and she's so dark.

She might be Italian or something; she's very dark and the boyfriend said something, a joke about she was turning into a nigger or something, and I was offended, but I didn't feel like it was my place to correct my friend's friend. But we were there with our friend who is Black, yeah he's Black. His stepdad is White, but his mom is Black and his dad was Black.

So, I didn't say something at the time, but when we got home, I apologized. I said, "That was not okay, and I was offended, and I'm sorry I didn't speak up. I don't know the person who said it. I just wasn't, I know, brave enough or whatever." But to put myself, to make a scene at a friend's house with their friend. Like if they had been my friend, if it had been [my friend who] that said that, I would have been like, "Hey,

not okay.” But it was somebody I didn’t know. I didn’t know the relationship between our friend and them and you know.

Based on the social graces, Stella learned, it was the responsibility of the host to address the incident. She did, however, apologize to the person of color who was with them after they left the party. So hers was more of a failure to act in public, than a failure to act at all. Table 14 illustrates Stella’s transformational learning experiences.

Table 14. Phases of Transformational Learning Experienced by Stella

Phase	Description
Disorienting dilemma	<ul style="list-style-type: none"> PI saying that military life was a bubble.
Recognition of shared discontent/community	<ul style="list-style-type: none"> The cohort was very supportive and they built a great friendship. Stella was surprised, though, that they had had such sheltered experiences.
Critical reflection on assumptions	<ul style="list-style-type: none"> That talking about injustice ensures it will not go away and activists are hypersensitive. That people do not all start from the same place and need different kinds of support to excel.
Trying on new roles	<ul style="list-style-type: none"> Hirer and developer of diverse employees. Namer of potential diversity situations with courage.

Mapping to Bennett’s (1993) developmental model of intercultural sensitivity. Some of Stella’s statements and her initial Intercultural Development Inventory placed her at polarization, reflecting an “us” and “them” orientation, and some of her statements reflected this orientation as well, such as when she spoke about her supervisors or about immigrants in the school system who made it hard for her child to get help for the learning disability. At the same time, some of Stella’s other statements reflected minimization, especially the emphasis on people as people, and some of her actions suggested ethno-relativity. For example, she has taken the lead on using her sphere of influence to increase diversity among employees. The conclusion is that the program moved Stella to early minimization, where she emphasizes commonality with others, but she still exhibits a trailing orientation of polarization, because of deeply engrained messages; under pressure, or when things are emotionally charged, Stella shares comments reflective of a more ethno-centric, us versus them polarized perspective.

Summary. Stella developed a new point of view during the program. She applied existing habits of mind such as the desire for fairness and support, which she had expressed in her advocacy for her children, to new situations, such as to people of color in underserved situations, helping her recognize that people have different starting points. Stella's supervisor's perception of her and the actions Stella has taken are all the more impressive, since she did not actually develop a new frame of reference.

In terms of *personal antecedents of transformation*, Stella's experience in the military across racial lines, her family background, and experiences with her children all served as important contributors to her learning.

Programmatic facilitators of transformation included her challenging the military, discussions about the readings and videos, and the safety and freedom for participants to speak their minds and dive into challenging topics.

Summary of Chapter

This chapter presented the individual portraits of the 10 participants in this study. Each portrait began with the background of the participant, followed by their reasons for participating in the Non-traditional Diversity Training Program, influential aspects of the program, and their behavior after the program. Further, Mezirow's (1997) and Bennett's (1993) models facilitated examination of the transformational learning experiences and movement along the developmental model of intercultural sensitivity for each participant. The next chapter will present a synthesis of the findings for all 10 participants.

Chapter 5

Findings

Introduction

This chapter presents the themes and insights that emerged from the cross-case analysis of the 10 participants' interviews. The chapter begins by providing the research questions that guided this study. Then, drawing upon Mezirow's (1997) phases of transformational learning, Chapter 5 examines the levels of learning the participants experienced, along with an articulation of what may have influenced their transformational learning, the impact of their transformational learning on their subsequent behavior, and aspects of the program that contributed to their transformational learning. The commonalities and differences relative to the themes that emerged across the study will be presented in order of the study's research questions. Finally, the chapter concludes with a summary.

The following research questions guided the study:

1. What was the experience of transformational learning for participants in the Non-traditional Diversity Training Program?
2. What influenced participants' transformational learning experiences?
3. How did participants' transformational learning experiences impact their behavior?
4. What aspects of the program contributed to participants' transformational learning?

In order to address these questions, the researcher used a semi-structured interview protocol. The participants shared biographical information. They also described their previous learning and experiences with difference, diversity, and inclusion, which occurred before they participated in the Non-traditional Diversity Training Program. Then participants discussed their participation in the program, described the impactful experiences they had in the program, and shared how the program influenced their thinking and behavior after they completed the program.

The researcher then applied interpretive phenomenological analysis (IPA) to analyze the data accordingly. Part of the analysis process involved mapping each of the participant's experiences using Mezirow's (1997) transformative learning theory and Bennett's (1993) developmental model of intercultural sensitivity to ascertain the extent to which transformational learning or movement along the intercultural sensitivity continuum occurred during the Non-traditional Diversity Training Program and to examine commonalities and differences across the participants' experiences.

Phases of Transformative Learning Experienced by Participants

Mezirow (2006) developed a theory of transformative learning comprised of 10 steps or phases. These phases include the following:

1. A disorienting dilemma: A person's assumptions or expectations of how things should be are disrupted/interrupted, leading to disorientation.
2. Self-examination of feelings of fear, anger, guilt or shame: The disorientation tends to activate a person's threat response (fight/flight or freeze) and gives rise to attacking, defensive, or paralyzing emotions.
3. A critical assessment of assumptions: A central part of the process of transformation, Mezirow (2006) described critical reflection as "the critical assessment of the sources, nature and consequences of our habits of mind" (p. 94).
4. Recognition that one's discontent and the process of transformation co-occur: The role of community in transformation is an often-explored aspect of transformative learning research (Taylor & Cranton, 2012). The community norms the experiences of the individual.
5. Exploration of options for new roles, relationships, and action: This phase involves imagining alternate possibilities.
6. Planning a course of action: Charting a course from possibility to reality.

7. Acquiring knowledge and skills for implementing plans: Building capacity to make the course from possibility to reality happen.
8. Provisional trying of new roles: Piloting efforts to make the changes.
9. Building competence and self-confidence in new roles and relationships: Development of the new perspective through experience and practice.
10. A reintegration into one's life on the basis of conditions dictated by one's new perspective: The final phase cements the paradigm shift as the new normal. (p. 94)

Mezirow (2006) asserted that these steps are neither linear nor mandatory; that is, people do not have to go through every phase or complete them in a prescribed order to experience transformation. People may also experience more than one phase at the same time. Table 15 shows the phases of transformation experienced by the 10 participants in this study. Seven of the 10 participants in this study experienced more than half of the phases of transformation. Of these participants, Delia and Esther experienced all 10 phases of the transformational learning process. The three remaining participants experienced fewer than half of the phases of transformation. As will be explored in the next section, which presents findings according to the research question, a connection was evident between the number of phases of the model participants experienced and the depth of learning they experienced.

Table 15. Mapping the Phases of Transformation Experienced by the Participants

Phases of Transformative Learning	Participants									
	Delia	Joseph	Matthew	Gabriel	Esther	Tom	Katie	Margie	Sophia	Stella
Disorienting dilemma	X	X	X		X	X	X	X		X
Self-examination with feelings of guilt or shame/role of emotion	X	X	X		X	X	X	X	X	
Recognition of shared discontent/community	X		X		X	X	X	X	X	X
Exploration of options	X		X		X					

Table 15. Mapping the Phases of Transformation Experienced by the Participants (continued)

Phases of Transformative Learning	Participants									
	Delia	Joseph	Matthew	Gabriel	Esther	Tom	Katie	Margie	Sophia	Stella
Critical reflection on assumptions	X	X	X		X	X	X	X	X	X
Trying on new roles	X	X	X	X	X	X	X	X	X	X
Planning a course of action	X				X					
Acquiring skills and knowledge	X		X	X	X					
Building competence and self confidence	X	X	X	X	X					
Reintegration	X	X	X		X					

Note. X indicates that the participant experienced this phase.

Presentation of the Findings

Research Question 1. What was the experience of transformational learning for participants in the Non-traditional Diversity Training Program?

Mezirow (1997) articulated four levels of learning, not all of which are transformational. Level 1 consists of elaboration of existing frames of reference and seeking new information to support an existing point of view or frame of reference. Level 2 involves learning new points of view and extending habits of mind to a new context, for example, extending a habit of mind such as ethnocentrism to a new group. Level 3 is transforming a point of view. Mezirow explained that individuals might have an experience with a particular group that changes their view of that group. One of these experiences does not change the underlying ethnocentric habit of mind, but Mezirow (1997) claimed that if a person experienced enough of these transformations of points of view about particular groups, the transformations might culminate in a change of habit of mind, that is, a change in ethnocentrism itself.

The highest or deepest level of learning, Level 4 is transformation of “habits of mind or frames of reference” (p. 7). On more rare occasions, critical premise reflection, or an accumulation of transformed points of view, lead to

a transformed habit of mind. According to Mezirow (1997), “Such epochal transformations are less common and more difficult. We do not make transformative changes in the way we learn as long as what we learn fits comfortably in our existing frames of reference” (p. 7). These transformations are permanent changes in a person’s frame of reference or mental model. In summary, Levels 3 and 4 are the levels of learning where transformation happens, or the domains of transformational learning.

Table 16 indicates the levels of learning experienced by each of the 10 participants in this study, as determined after mapping participants’ experiences to Mezirow’s (2006) transformative learning theory.

Table 16. Experience of Transformative and Nontransformative Learning

Types of Learning	Participants									
	Delia	Joseph	Matthew	Gabriel	Esther	Tom	Katie	Margie	Sophia	Stella
Level 1.										X
Level 2.				X					X	X
Level 3.		X	X			X	X	X		
Level 4.	X				X					

Note. X indicates participant experienced this level of learning

As Table 16 indicates, seven of the 10 participants (Delia, Joseph, Matthew, Esther, Tom, Katie, and Margie) experienced some sort of transformation. Five of them (Joseph, Matthew, Tom, Katie, and Margie) experienced a transformation of a point of view, a Level 3 transformation/transformational learning that came from applying existing habits of minds to new contexts. For example, Tom stated,

This program changed the lens I look through around D and I [diversity and inclusion]. The water has been muddied. First, I appreciate much more the complexity of the challenge and the extent of the legal racism that occurred and continues to occur today toward people of color and different lifestyles.

And Matthew said,

I think that it was, you know, there was a lot of things that I was, you know, oblivious to, you know, um, you know, I thought discrimination and racism were bad, but I think, you know, it's hard to, to talk about it just cause it's comparing it to what I know now.

But, you know, I don't think that I understood the depth or some the systems that were in place or didn't have a framework. So, I mean I think, you know, I had some experiences with difference beforehand, you know, whether that was growing up in my home town. We had like a large Native American population and, you know, there was, I noticed some of that stuff at work and, um, but I, I, you know, I said it was, I don't think that I necessarily saw some of the other issues that were going on.

Um, so I mean, I think, you know, I was sort of stuck in just like this is the way things are or this is you know this is my frame of reference and my experience is, you know, that my experience is kind of similar to other people.

Um, so I mean I think in terms of the, the framework, like I think that it was like I had a lot of, it was a lot of homogenous experience as growing up whether it was in, um undergrad or in, you know, at, um, you know, in my home town. Ah, and I think like in going through [the Non-traditional Diversity Training Program] that there was, you know, that I saw some of the, my previous experiences in a different light, so....With, you know, like the Native American population, I think there were, you know, a number of folks who were either discriminatory or just not that pleasant to folks who were working with, um, at like the golf course, for example, that I worked at.

Um, but you know, I saw this in a different light after going through [the Non-traditional Diversity Training Program] and I think after you know other readings that I've done since in terms of like Howard Zinn, like I mean. It was this other world that was sort of opened up that's like, okay, maybe my experience

isn't the same as everyone else's then there are these, there are ways to get inside into other people's experiences.

Two participants (Delia and Esther) engaged in premise reflection and experienced a transformation of a frame of reference. Esther's comment reflected this change:

Oh, no, what if, okay, what if I look at it from this perspective? What does it mean? Right and that it would, shift to that being, like almost like it physically shifted my brain so that I feel really strongly about that now and it really came out for our students in the fall in their criticism.

Delia described how changing felt for her:

And it just, it literally, it was just this feeling of like...cracking open, and that's when, within, maybe the next two weeks, I started—you introduced us to Tim Wise [Popular national white privilege speaker], and I watched him speak and was like...everything he said made so much sense, everything he said....and all of a sudden, I understood privilege. And I became really, like, everything that has been political for me all of sudden became personal. And you know they talk about the personal being political. It was like the opposite for me. I have always been political, I've always been kind of out there. It never has felt...even with the [assault]. Even when I, there was a distance there and all of a sudden, it was like, it is not technical anymore, this is real. These are human beings. And we have a responsibility. It just felt very, like something, I wrapped my arms around it.

Three participants (Gabriel, Sophia, and Stella) experienced non-transformative forms of learning at Level 2, namely learning a new point of view or applying existing habits of mind to new groups. For example, Gabriel extended his commitment to inclusion for people of different religious and sexual orientations as well as people with low income, people with disabilities, and people of color. Gabriel described his learning:

So, I guess my hope [that] I've learnt language to be a little softer with people may not be totally true; I think I have learned language to be more supportive to the victim. So [my partner], um, has had a few experiences

that have not been pleasant, usually related to class, um, because she does not come from the same class background as me.

Um, and you know recently, her boss basically said, “You know you’ve”—to paraphrase—“you’ve come up to a different class,” And because she asked for a raise because they are hiring a graphic designer at the same pay level as her, ah, and she would be managing this person herself.

She now reports exactly, so the structure just, she should get a raise. And he basically said, “Look you’re lucky to be here and be with this upper crusty folk, um, quit asking for shit.” And now she is looking for new jobs, and I think that’s the correct response to a microaggression from your boss. It’s like, oh, I’ll seek employment elsewhere ‘cause I’m not going to educate you and you’re probably not going to listen.

And it’s given me more language to talk to people about that; I still don’t react well to bullying. Um, so it hasn’t helped me react to the bullying now that we are talking about it, I still do terribly with that or very well depending on your perspective. I’m fine with my behavior; it’s the other people that seem to not like it. [Laughing] But I’ve already kind of devalued them and decided that I’m done with them.

Additionally, Stella elaborated upon an existing frame of reference, representing Level 1 learning; that is, she articulated her belief that people should be treated with decency, regardless of who they are:

In fact, they owned a liquor store that my mom worked at in the summer, and she was told that there was a Black lady that would come do her grocery shopping. And she came past the liquor store and had a bench and she would stop and rest there. Sometimes she would ask if she could use the bathroom.

My grandfather said, “Anytime she comes, I don’t care if the store is full, you close the store and you give her a ride home. You make sure you give her a ride home. It doesn’t matter we were doing some business or whatever. You drive her home.” It just was so different from what actually. To her that was, this woman who is an elderly woman and she’s got these groceries and we’re going to stop and give her a ride. Then it wasn’t a matter of what the color of her skin or anything was.

In summary, all participants learned during the program. Seven of the 10 participants experienced some form of transformational learning. Five of them experienced Level 3 learning, transformation of a point of view, which involves applying an existing habit of mind to a new context, in this study, a new group of people. Two participants experienced the highest or deepest form of transformation, a transformation of a frame of reference.

Research Question 2. What influenced participants' transformational learning experiences?

Seven themes emerged in the data that portrayed the elements that impacted participants' transformational learning experiences:

1. Number of phases of Mezirow's model experienced
2. Emotional openness/sensitivity
3. Emotional intelligence/resilience
4. Importance of critical reflection
5. Professional orientation
6. Local primer experiences
7. Power of antecedent primer experiences.

Number of phases of Mezirow's model experienced. In this study, the number of phases a participant experienced seemed to have an impact on the level of learning they experienced. Participants who achieved learning at Levels 1 or 2 (Sophia, Stella, and Gabriel) experienced four phases of the model. Those who experienced transformational learning at Level 3 (Joseph, Matthew, Tom, Margie, and Katie) experienced five to eight phases of Mezirow's model. Finally, the two who experienced Level 4 transformational learning (Delia and Esther) experienced all 10 phases of Mezirow's model.

In addition to experiencing all 10 phases of transformation, Delia and Esther, the two participants who achieved learning at Level 4, shared several other attributes in common. Their identities as women were a salient, maybe even a central part of who they were. These two participants were both academics with terminal degrees,

whose parents had terminal degrees. Both participants, through education and learning, had developed important habits of mind, such as critical thinking and self-reflection.

Both participants had some prior exposure to diversity. Delia's exposure was through her family and the students with whom she worked. For Esther, the exposure was through the international students in her hometown, her religion, and her travels. Both participants were raised in non-traditional families. Delia referred to her mother as a "hippie" and her upbringing as one growing up in a home always filled with creative types from a variety of backgrounds. Esther referred to being a part of a non-traditional religious denomination and having a mother who earned a Ph.D. in science a generation ago, when this achievement was even rarer than it is today.

Finally, these two women carried a sense of vulnerability. For Delia, her vulnerability was related to being a survivor of an assault. Delia stated,

I think, I think, I was very aware of not having. I can see White privilege with men, it is easy to see and I have always, well not always, but for a long time, I've been aware. I've sort of seen that, but I never felt myself privileged, because I think it's the deepest, darkest piece of me, I've felt vulnerable, because of what happened to me.

Esther's vulnerability was related to having an identity as an "other":

Because I am a better teacher when I am out my comfort zone. So, when I was in [the Middle East] and unable to speak the language, and the only woman who didn't have her head covered, and the only woman who didn't dye her hair and just in terms of being very visibly *other*, it was a good reminder that it was exactly what I wanted to do in terms of thinking about my students and how I expect them to know exactly what they are doing when they show up on campus and they don't.

So, experiencing that vulnerability, I like to think makes me connect with them a little bit better, or at least allow them to articulate some of the issues that they are having as they learn to write in the academy.

For Delia and Esther, the interaction of identity-based experiences (gender, religion), prior learning (graduate education), and feelings that created less certainty (vulnerability) significantly contributed to their learning and primed these participants for the transformation they experienced.

None of the other participants exhibited this same full range of attributes. Matthew had the education that supported critical thinking, and the curiosity and humility, but not the experiences that fostered vulnerability. Tom and Margie had the vulnerability, but not the critical thinking habits fostered by terminal graduate education. Joseph had the identity-based experience and shared a sense of otherness with Delia and Esther, as did Margie, but he had worked through his feelings of shame and insecurity, and spoke of them in the past tense during his interview. These other participants experienced transformative learning, but it is possible they did not experience a deeper degree of learning because they did not share all the characteristics Delia and Esther possessed.

Emotional openness/sensitivity. Five participants (Joseph, Matthew, Tom, Katie, and Margie) experienced Level 3 transformational learning. This type of learning expands an existing point of view, essentially applying an existing frame of reference or habit of mind to a new group. Matthew was something of an outlier, because of his prior transformative learning experiences as a result of study abroad and his teaching practicum. Nevertheless, he shared attributes in common with the other participants who experienced similar levels of transformation.

Examination of the responses of the five participants who experienced Level 3 transformative learning yielded commonalities and differences that might have contributed to their experiences. These participants experienced five or six of the phases of Mezirow's transformational process. They also shared an emotional sensitivity. Tom referred to a sense of opening himself to vulnerability that had recently re-awakened in him: What I'm saying is my learning and growth right now has been to throw out my narrative and open myself up to vulnerability, and that makes sense to me because at 13, I shut myself down because I was really, I would just break up. I was in a horrible state and I couldn't function.

So, I just said, “You know what, I’m going to put my socks, I’m going to work, I’m going to just whatever.” And I adopted that script and from [age] 13 to 55 or 53; that script has lived its life and I need to get it out of my body. So, it’s been really good. It’s opened me up in a good way.

Margie and Katie referenced a sense of insecurity. Margie stated,

Well, I will say it [insecurity] affects most everything in my life, and it probably always has. And I don’t know where it comes from, but I remember it even probably from my earliest memory. Part of it is being a shy person, too, and it all kind of ties together. You know, I remember my parents would, or my mom would drop me off at the Y for swimming or gymnastics and I always had this fear that she wouldn’t come back and pick me up.

Katie recalled her feelings of insecurity, as well:

Mainly insecurity issues with myself made me nervous because I didn’t know if I opened up how I might be perceived by others, um, but I wanted to be honest. So, you know, so it was kind of the, the weighing of okay, how much do I open up and let me go in. And so I was mainly just unsure and nervous.

Joseph referenced experiencing a deep shame, as well as feelings of insecurity. He stated,

You know, because I was insecure, and I just wanted to fit in. Um, yep. So, um...And, and it wasn’t necessarily a, a, a conscious effort to sort of like push away anyone else who didn’t look like me; it was just that as I got more and more friends, they just happened to look like me, and as we became closer, the differences between us became more apparent. And that became more of a source of sort of like a little inner turmoil, maybe some shame, for me. Of course, now looking back on it, it’s just ridiculous what kids think. . . . There was always, there was always this palpable feeling of shame. . . . To me, I was just completely different, um, and even though we sort of looked like everybody—you know, we looked like all the other White kids in my school—I, I struggled with this insecurity that we *were* different.

Matthew referenced the power of humility and curiosity in his life. He said,

Yeah, I think you have both of, you know that's like curiosity and I think humility and I mean I think that that, those are you, know humility isn't always the easiest thing, um, and then I think you know it is a big barrier to growth.

But yeah, that humility piece is really important to be able to, you know it's like being open to other possibilities as opposed to just, you know, your own current understanding of the world.

And I mean, I think, um, yeah, I mean, you know, it is that curiosity, um, that's really the big one. I mean, I think, you know, with, you know, I realized that I don't know everything and, you know, I think it's helpful that I at least for the most part try to see everything as a growth opportunity.

Or, that, you know, I don't, I'm sure I sometimes have an ego but like all the time, you know, I try not to have too large of an ego as a guide. Just because it's, you know, there's always something I can learn, so I think, you know, I can take criticism. But so, that I think, you know, I think everything is sort of an opportunity for learning and growth even if it's painful or uncomfortable.

So, I think curiosity was one of the big things, I mean I think you know also that something like this might help in terms of career, you know, personal growth or career growth or just being a better human. Um, so, yeah, I think it was kind of, ah, an openness to it but that's probably the, you know, the main reason why I participated in it.

Yeah, yeah definitely. I mean, it's yeah, I think being open and being curious. I think the first step forward or, at least for me it was the first step to, you know, just being able to, you know, learn more or grow more. Like I think that's, you know, sort of the like necessary soil to be able to grow all sort of stuff.

It is highly likely that these sensitivities made it easier for participants to empathize with the challenges faced by other people. Indeed, these participants explicitly referred to the phenomenon of empathy. Joseph mentioned empathizing with darker skinned immigrants and people of color.

So there was that, and, uh, I mean, I always wanted to relate to the other, like other ethnic, other people who I knew were first-generation immigrants or children of immigrants, because I knew what they were going through, too. There were times where it dawned on me, like slightly, that okay, maybe this person from India, who is clearly Indian, you know? There's no—you can't, you can't say, you can't look at them and be like, "Well, maybe he's from Ireland or maybe," that people are judging them point blank, before a second even goes by, and it's just, I don't know, it just doesn't seem fair.

I got more out of it, reflecting on, what, like, putting myself in the shoes of someone who has to go through this, who has to suffer through these sort of silent biases at every turn. And it, that's what made me sort of, gave me pause and made me think about it on the drive home from work and be like, "Well, what, what can I do?"

Tom shared his concern with persistent racial inequalities. He said,

For African Americans, there was a deviation and a pretty serious one. So, we were just sort of saying, "Now we are on 2016, and we have as long as this country has been here longer, so we have 200 and whatever, 200 plus years of varying degrees of discrimination and racism, which is here today.

So, we were just sort of wrestling around, never mind trying to figure out the why? Or the what? But going forward, this narrative in my mind, somewhat simplistically of I think [a city in Midwest where there have been recent racial challenges]. That's was one of several examples over the past year or two where this conversation has gotten energy again in a way that it can't be tampered down again.

These affective experiences seemed to open the participants up to deeper learning than would have been possible than if they had only spent time in the cognitive domain. Another aspect of affective impact occurred in the realm of emotional intelligence or resilience.

Emotional intelligence/resilience. As previously stated, the participants' interviews revealed the power of affect for those who did experience transformation. In addition to the experiences that opened them up, such as

vulnerability, insecurity, humility, and empathy, participants also experienced negative emotions that originally turned them away from learning about diversity and inclusion before and during the program. Delia and Tom experienced anger during the program, and Joseph battled shame and insecurity, because of his ethnicity, for a long time. Matthew and Margie felt discomfort as part of their program experience, and Esther experienced resistance. Examination of these emotional experiences revealed an important point. The participants' abilities to leverage or manage their emotions was a critical part of their ability to experience transformation, which has an emotional/affective competent, as well as a cognitive one.

In order to manage the stress, fear, anger, and pain that conversations about diversity and inclusion aroused in them, participants needed to possess emotional resilience. Delia referred to experiencing an anger that closed her off. However, she was able to work through that anger and open up to learning. She explained,

I think the other thing was that I resisted the idea that I was in some way privileged. Like that really ate at me and I can remember being angry, like I can remember going home and being like, I don't know, why I am doing this, this is, why do I want to sit for two hours and be told that I am not a good person? Like that's the way it felt to me, and it was funny because at the same time, one of my colleague's husbands, they were doing sensitivity training and he was like, she would tell me stories about angry he was. He would come home and be so angry and I wasn't feeling that strongly [laughter], but I definitely was like, what is that about? I am so bugged and then, and then Trayvon [Trayvon Martin, victim of a racially motivated shooting in 2012], and I can remember, so the Trayvon thing happened. I remember reading about it, and then I heard about it, and it was like, maybe it was a day before the, we had an [Non-traditional Diversity Training Program] session, and I remember thinking about my nephew and thinking oh my god, I hope, my brother-in-law is teaching him, just to be like, aware of this stuff. And then feeling, I was blown away by this feeling that this happened and back then, it was isolated, right?

Like back then it was this isolated thing, it's not like today when you realize it is happening all the time. And I think it was like I started, everything just went like click click click click click into place, like I remember, within that 24-hour period, [city where small, Northeast college is located] had undertaken, the police department had undertaken a year or whatever prior, some study to see where they actually pulling over people of color more often or differently and what were they finding It was the thing that was being done nationally and the findings were like really compelling, you know, not good. We weren't behaving in a good way and, and eh and I felt really strongly and I remember going into [Nontraditional Diversity Training Program session] and I brought up Trayvon and I mean, I think it was just in that sort of our "what's going on?" check in and I brought it up and I remember choking, I felt so emotional about the situation, it was so, it just blew me away, and I remember thinking about, because Trayvon, Trayvon would have been the same age as my oldest, who, and thinking, how do you do that, how do you that as a mom?

How do you? and then realizing that for many moms, living in certain areas, and I remember hearing about, on NPR, on one of the, I don't know if it was this American life, but the idea that, um, graduating from high school, being alive to graduate from high school in many parts of this country, as an African American man, as a young man, that's huge, to be a mom who gets your son, through 18 years of life, and he's alive and he walks across that stage, is bigger than anything you can imagine. And all of this stuff just came together. And then the violence and the fact that that happened in Florida and what happened to me happened in Florida. And em, it just was, there were a lot of things that clicked for me. Um, and it made me start, I think what happened was, I just opened it, it just, I cracked open.

I cracked open and in that, it didn't matter to me anymore that there were people in the group who were being distant about their emotions or who were being preachy. What mattered to me was what am I going to get out of this, and I wanted to listen to you and I wanted to talk about it and I wanted to do the readings and engage and process and I just, it literally, it was just this feeling of like ...cracking open and

that's when, within, maybe the next two weeks, I started, you introduced us to Tim Wise, and I watched him speak and was like...everything he said made so much sense, everything he said....and all of a sudden, I understood privilege. And I became really, like, everything that has been political for me all of sudden became personal. And you know they talk about the personal being political. It was like the opposite for me, I have always been political, I've always been kind of out there. It never has felt...even with the assault. Even when I, there was a distance there and all of a sudden, it was like, it is not technical anymore, this is real. These are human beings. And we have a responsibility. It just felt very, like something I wrapped my arms around.

Tom also experienced anger and moved past it.

I think the one moment that stood out was when you said it didn't matter what my background was—that I worked my way through college and business school without help from my parents. I was offended. I was mad at you. I felt discounted. Eventually, I appreciated the point you were making.

I know now that you do honor my experience because I have worked with you. But you still have a mission; you have a mission and I have a [work function] mission. So it is a bit like, “You are on your knees now do, what I say.” So, we have to let people, I don't know, you have to sit there and take what feels like a hit to get more integrated with that other person's mission.

Tom's declaration of the need to “sit and take it,” that is, to deal with the sense of discomfort and pain elicited by the primary researcher and the content presented in the program in order to be able to learn, spoke to the need for emotional resilience or emotional intelligence, in essence the need to be able to experience, and then recover from, and move past negative emotions that could otherwise hinder one's ability to learn. Esther exhibited this resilience, by questioning herself. Her self-examination essentially gave her permission to move past resistance, question her deeply held beliefs and unexamined assumptions, process the attending discomfort that came with the

questioning, and allow herself to experience transformation. The process of reflecting critically on their own beliefs and feelings was important to nearly all of the participants.

Importance of critical reflection. Nine of 10 participants engaged in critical reflection as part of their learning process. Esther described her experience:

Fundamentally, of course, yeah, I'm the same as these women [from a service trip in Latin America], right? They are single parents. I was a single parent. They are working hard, they are, we, I am with these women. Then, you know, I got the results back of the IDI [intercultural development inventory] and I was like, "Okay, whatever. It's a stupid test anyway."

And then, of course, we got to do it again and for some reason that question stood out to me and it corresponded with one of the early sessions that we had. Where you had the three circles All of those influence and factors which I had the hardest time understanding and getting my head around and everything else, but, like some for some reason, "Huh." It was just enough to make me go "huh." So, that when I saw that question again, I went, "Huh," maybe not, maybe in this circle we are fundamentally the same, but there are these other circles that I am not aware of. So I was really consciously aware of that and since that time have been aware of how I, I mean I still do it, because I am aware that I make generalizations more typically about women.

Then the other one was, that conversation that we had about racism. We had [participant] really is struggling out loud. Saying, "Wait you are telling that I am racist?" Everything that he was going through out loud, I was going through in my head. That was really profound for me, but once I kind, of yeah, once I was willing to look at it from a different perspective to kind of say, "Oh, no, what if, okay, what if I look at it from this perspective? What does it mean? Right? And that it would shift to that being, like almost like it would physically shift my brain so that I feel really strongly about that now and it really came out for our students in the fall in their criticism.

Esther initially resisted information that suggested that she was not as interculturally developed as she considered herself. To her credit, she continued to mull things over and examine her assumptions, and eventually, she had a moment that illuminated her tendency to overemphasize commonality. As she continued to struggle and reflect, she challenged herself to look at things differently and experienced what she described as “physical shift in the brain,” a paradigm shift that has impacted her actions and perspective since then. It was also telling that Gabriel, who had the most experience with diversity of all the participants before he entered the program, exhibited the least amount of learning, relative to his starting point, and he was the only participant who did not engage in critical reflection. Gabriel was also among the participants whose experiences at work affected their learning in the Non-traditional Diversity Training Program.

Professional orientation. Three participants, Gabriel, Sophia, and Stella did not experience transformation in their learning. Instead, Stella experienced Level 1 learning, and Gabriel and Sophia experienced Level 2 learning. In reviewing the responses of these participants, Gabriel appeared as an outlier. While he had had significant experience with diversity, personal learning, growth, and curiosity were not his primary motivations. He was invited to participate in the Nontraditional Diversity Training Program by the primary facilitator because Gabriel was seeking a place to have conversations about diversity. He also was interested in seeing how his coworkers fared around such discussions. The other two participants, Sophia and Stella, shared a professional orientation shaped by their careers in business unit operations. Interestingly, Margie also shared a similar professional focus and orientation, but the two experiences that might have led to different outcomes for her were her experience with the homeless community and the sense of insecurity and shyness she has battled her whole life. Stella and Sophia did not reveal any affective experiences in their interviews. Their experiences came across as relatively rational, when compared to those of other participants. For example, Sophia described what she felt she learned from the program as merely a way to adjust her evaluation of her own openness:

So, I would say, I felt like I was a really open person who diversity wasn't an issue from it right? Because I am open to it and I am inclusive and I think what [the Nontraditional Diversity Training Program] taught me is that I was not as far along on the spectrum as I thought I was.

Still to this day I still challenge myself because I am not quite as far along the spectrum as I would like to be. I think part of that is awareness, which is what I really got out of [Non-traditional Diversity Training Program]. So, I would say I was always open to difference, I think I have gained more value in what difference in diversity brings, before I was open I would say more receptive and looking for it now, versus just if it comes by, if that makes sense?

Local primer experiences. The biographies and experiences of the participants appeared to have shaped their paradigms upon entry and their experiences and learning during their participation in the program. One of the most fascinating discoveries from the data analysis was the commonalities among the participants who had been born and raised or who had spent the majority of their lives in the state where the small, northeastern college is located. Two of the participants, Katie and Sophia, were born and raised in the state, and one, Margie, moved to the state when she was three years old. Stella was raised in the state and spent a good part of her life there, but she had also lived in several other places.

The first commonality among these geographically local participants was their description of their paradigms/orientations towards difference before the Non-traditional Diversity Training Program. These participants who spent significant time in the state spoke about viewing people, just as people, not as their social identities. Margie elaborated,

I worked, I was in high school, my first job, I was working with a gentleman who happened to be gay. He was out, you know, he talked about it; this is back in the 80s. So, I just never, and I don't really know how this happens, but I just never really thought, it's just like this were just all people, I mentioned before. This is my coworker. This is what he believes. This is what he likes.

Katie explained that even though her family was multi-racial, she never focused on that aspect of their identities:

So, my mom's Asian, my dad is [ethnicity], but they're just my parents. So, that never, like, occurred to me that I grew up different and that my mom was very different. Like, they were just my parents, you know. So, even though I grew up in a diverse household it didn't seem that way, and it was never really talked about, which I think is also very interesting.

I think so, um, not really my beliefs, because I've always believed that people are treated equally like it doesn't matter what you look like or what you believe or what not. So, like, I don't think my beliefs changed, but I think my perspective changed.

This type of orientation toward difference is common state- and region-wide, as the people in this region have a vested interest in inclusion. These four participants, all female, also had very little experience of discrimination or inclusion themselves. Three of the four participants, Margie, Sophia, and Katie, also had very little experience with racial diversity, although Katie's mother is half Asian, and Margie had a close friend who was Asian. Incidentally, all four of these participants were involved in business-related fields, so it is possible that the culture of their disciplinary field had an impact on their learning and/or shaped their worldview, as three of the participants, Sophia, Stella, and Margie alluded to a passion for detail, structure, precision, and getting it right.

Power of antecedent primer experiences. In contrast to those who had little experience with diversity, other participants had powerful experiences with a wide range of identities that primed them for learning. Joseph's experience of shame over his ethnicity and desire to pass as a "regular" person, and his sense of guilt and responsibility for being "ethnic but White" is an excellent example of how prior experience made him open for learning. Joseph shared,

So I definitely did use that, you know, and my mom would tell me, like, "Make sure you mark down every box as Hispanic and this and that; it's only gonna help you." And I did. All the while, hiding behind the White dominant thing, and so that there was a feeling like, okay, I should really own up to that.

You know, so, that's another reason why I wanted to sort of—I think it's so easy, especially in this state, to just go on as a White person, about your day, uh, with blinders on, and um, without a con-, without a sort of a—there's a thing about emotional intelligence and cultural sensitivity—so I want to be a more emotionally intelligent person.

I want to be constantly observing what my reactions are and taking note of them, just gathering data on my own self. And so I think [Non-traditional Diversity Training Program] was a great, a great, um, opportunity to bring up the things that I may overlook, um, bring up experiences that people have, feelings that people have, without, that I may never have ever considered.

Matthew's study abroad experiences, Esther's sense of vulnerability and feelings of otherness, Delia's experiences in her family and the feminism she developed after her assault, Tom's religious upbringing and international experiences, and Gabriel's experiences with diversity in his family vis a vis religion and sexual orientation and his overseas experiences were all things participants brought into the program that enhanced their learning. Priming was critical, whether it happened before the program or as part of the program, because of its connection to affect and affect's connection to learning and transformation. Thus, for the participants to make room for the exploration of these prior experiences and the emotions associated with them was an important facilitator of learning

In summary, along with the number of phases of Mezirow's model that participants experienced, their social/emotional capacities and competencies impacted their learning. Factors such as emotional openness/sensitivity, emotional intelligence, resilience, critical reflection, professional orientation, local primer experiences, and the power of antecedent experiences all appeared to influence transformation.

Research Question 3. How did participants' transformational learning experiences impact their behavior?

It was significant that, regardless of their level of learning, all 10 participants could point to examples of trying on new diversity experiences and roles in cognitive, affective, and behavioral domains. The focus here,

however, is on the participants who did experience transformation and those who could highlight actual behaviors that demonstrated their transformation. These actual behaviors included infusing D & I content into his/her work; taking on leadership roles in D & I efforts; becoming more inclusive at work; and infusing D & I into discussions at home with family members.

Specific influences on behaviors. In terms of infusing D & I content into work, Esther described how her new paradigm shift motivated her to work with a fellow faculty member to infuse content about race into her course:

[My faculty colleague] had never thought about doing this by himself. But he appeared to be very open about it. I didn't realize how uncomfortable he was with it until we kind of got underway, and he said, "Well, this isn't as bad as I thought it was, this is going better than I thought it would."

I want to help it and I do want to make a difference; I want to. I don't want there to be racism in the world. I want people to be better than they are, but I don't think I am in the position to make that happen. Right, it's not my community; I am an interloper because I am White. But it doesn't mean there aren't things I can do. I can drag my course students kicking and screaming through a process because they are going to be in the thick of it when they graduate.

Similarly, Delia pointed to actions she had taken at work; she had demanded diverse representation in the output of her team and had taken other steps to institutionalize diversity and inclusion. Delia stated,

30% percent diverse [for children's college choice], it can't be anything other than that. The kids have bought into it; they understand how important it is. But those kinds of things, they seem small. They are huge. It informs so much of what I do every single day. When we had our [big work event] in May. We were looking at the PowerPoint that we had created, and we had created it like three years ago. We do this PowerPoint that is just pictures of people. We say something and it is like you, pictures of certain things, like that night that you had to stay up all night to get your paper done and ignored your family and there is a picture of this screaming baby in a crib, like those kinds of things, and every single picture that we had, was of a White

person or a White baby or a, every single image and this past graduation, we had a number of people of color, who were going to be at our party and it like, it was [laughs]. I thought, this can't be, and I totally overreacted and I get that I overreacted. But I was like, "Every single person on there is White." And I had the whole team there and I was like, "What are we doing? That's not representative." We need to figure out...even like the hands throwing up their hats, everything was White...so I said to [a coworker], I was like, "You need to stop everything else you are doing and redo the PowerPoint." Which sounded silly, you know, I'm sure people were like, "This is ridiculous, this is [big event], there is a ton of shit to be done and you are worried about a freaking PowerPoint." But I was sick, literally sick to my stomach, that we were going to have, we had people travelling from all over. We had people from all over who were going to be there. And every picture was going to be of White people? So he did. He redid it. I was really happy with where it ended up; it was representative, and um, but I felt people being like, "Wow, she is overreacting." So that was, it ate at me, but not enough to change what I was doing.

With regard to taking on new leadership roles in D & I efforts, Tom took on a leadership role in diversity and inclusion efforts on campus and shared that this activity actually deepened his understanding of the concepts:

The work I continued to do with you on a variety of efforts for [my office] is what has deepened the impact of the program. Tackling this issue on a daily basis is much more difficult than just taking the program and going back to my job.

In terms of becoming more inclusive at work, Margie talked about reaching out to a student worker of color in her workplace and getting more involved in service:

Even, like, we have [current student worker]. So, he's been working for us; I know he's had some issues and since he started, it makes a lot of our other students that come in and they're like really top of their class and they really know they more than I do, about a lot of stuff, and they're just in there like, show me what to do and I'll do this.

I've really been trying to take the time to get to know [student], and talk to him about, you know, more about his personal life, and he actually hasn't been coming in. So, I'm a little concerned about that, and that's the case I'm just going to reach out to him, but, to really try to feel like, let him know that he's got someone that he can count on and talk to, and, you know whether it's problems with work or anything else.

So, I just feel like, you know, I'm trying to be much more aware of him and really try to reach out to, you know, more people that could use, even if it's just someone to listen to or talk or to just let them that there's people around that care about them, and I definitely wouldn't have been aware of that in the past, since I was like, they are just a student and they need to do the work, and I'm trying to do that with all students.

Finally, with regard to infusing D & I discussions at home with family members, Katie described that her actions have been more focused on her family, because the introverted nature of her team means that she does not have a lot of opportunities at work to exhibit pro diversity behaviors. She related an experience she had with her husband:

Um, so I think yeah my perspectives definitely changed and I remember during the program, um, my hus-, my husband and I were in a car one day and we drove by this car that was stopped on the side of the road and it had two cop cars and they had um three, two or three, I can't remember, exactly but, there was, um a Black gentlemen standing outside of the car and [my husband] made comments...and he's not racist.

He didn't mean it, but it set me off, and I shut down for the rest of the night. I did not talk to him and he was like, "What did I do?" And I was like, "You can't assume or make judgments or make comments like that because of the color of their skin."

I was like, "I mean we had a child, like in the back seat, like you don't know it he's picking up." You know so, like I was so pissed [laughs] and I shut down and I did not talk to him for the rest of the night

because like things just I notice comments more or things just kind of ping me all of differently now than they did before.

In summary, it is significant that every participant could point to some form of learning and behavior, ranging from the acquisition of language to articulate previously known concepts, and increased awareness at the lower levels of learning, to a total paradigm shift. It is also significant that all participants could point to increased pro diversity and inclusion attitudes and behaviors. These findings indicated that positive diversity and inclusion behavior can happen at any level of learning. These findings also represent encouraging news for those seeking an increased return on investment on the significant investment in diversity training. In addition to these examples of behavioral impact, another theme that emerged and related to behavioral impact was that of the work environment.

Work environment. In looking at participants' descriptions of the actions in which they have engaged, it became clear that the participants' roles in the organization and sphere of influence impacted what they were able to accomplish. Two perfect cases in point are Joseph's and Katie's; their day-to-day lives in technological spaces do not afford them much opportunity to practice, so their examples are more internal or familial in nature. These actions contrast with those of Delia and Tom, whose senior level roles have allowed them to have much broader impact. Tom also mentioned knowing that his past and current vice presidents supported his participation in diversity and inclusion activities added to his motivation to enact supportive diversity and inclusion behaviors. While not a senior leader, Stella leveraged her sphere of influence as an employer of student workers to bring some diversity to her team, and Margie leveraged the opportunity to try a different approach to help a struggling student employee of color in her department.

Research Question 4. What aspects of the program contributed to participants' transformational learning?

Seven themes emerged regarding aspects of the program that facilitated and supported participants' learning and transformation. The themes were

1. Voluntary versus mandatory training

2. Broad versus narrow content
3. Experiential program content features
4. Objective data
5. Disorienting dilemmas
6. Community and safety
7. Power of program length/Having time to struggle.

Voluntary versus mandatory training. While the researcher was aware of the role modeling and encouragement to attend from senior leadership, one of the biggest surprises from the study interviews was that attendance had been mandated by some leaders. None of the parties who were required to attend appeared to regret their participation, and their experience does not appear to have been negatively impacted by the mandating of participation. Katie mentioned her hesitation and nervousness about participating, because she was afraid of being judged. This reticence and her introversion kept her from speaking up as much as she might have, but her learning does not appear to have been negatively impacted.

Broad versus narrow content. The Non-traditional Diversity Training Program contains both broad and narrow content. This appeared to be a useful way to both challenge and support participants and help them get an understanding of multiple perspectives and identities. Stella captured a common sentiment that has been shared relative to the program:

My take away wasn't just, kind of going into it, you get the feeling that this is about Black. But coming out you feel like, no this is more about different groups. The LGBTQ community, people with disabilities, people with different skin colors and different ethnic backgrounds and different religions. It's bigger, but I think going in you have this, you're going to be told how to not be racist. So I don't know if there is a way to change the message of this is what this is about, but that might be good to make sure people are aware it's not about this one thing. We can take any group and do the same thing and get this across the board.

Indeed, although the narrow content focused on race, probably as a result of the racial homogeneity of the state, and the inclusion of broad content, some of the examples participants provided were not related to racial diversity. For example, Matthew talked about advocacy related to gender identity, specifically about gender neutral restrooms, and about feminism. Margie shared the impact of her interaction with homeless people on her learning and experience, in addition to talking about people of color, and Gabriel focused on his religion and his sibling's sexual orientation. Stella talked about ability and socioeconomic status, in addition to race. These reactions indicated that it is possible that participants focused on narrow content, as long as they had room to talk about other identities as well.

Experiential program content features. Several of the participants alluded to the power of experiences that helped them step into an other's shoes. These program features were videos for Katie, the "other culture" experience for Margie, and case studies and perspective taking exercises for Sophia.

Katie mentioned the power of videos shown in the Non-traditional Diversity Training Program that helped her "see" people's emotions.

Um, so anything video-related hit home to me and more than just discussion necessarily. Um, I really liked, you know, just having you [the researcher, who was also the facilitator of the Non-traditional Diversity Training Program], like, say someone could feel this way or this type of group of people feel this or, you know, just you saying it as one thing but seeing the emotions, seeing real, or hearing real life experiences, um, that really made it true for me and really opened my eyes more than just talking about it. Um, so all the videos, um, anything we watched really made a difference, and I'm a very visual person.

Margie spoke about the power of an experience she had with a population of homeless people.

So, and anytime I see the different events going on going on that help different causes and things like that, I'm much more inclined to jump in and help them, because, you know, you do see it from the other side, and that's just, even though you're really not on the other side, at least seeing it a little bit more. So, now I think

that [experience at the homeless shelter] was my biggest moment because, it just made me feel so, not what I used to.

These experiential program content features appeared to help bridge the gap between the lack of diversity experiences that some of the participants had and the content presented in the program. When considering the potential disciplinary orientation and the rationality/objectivity associated with technical business functions, these primer experiences might also have helped some participants engage in their affective domains, in addition to cognitive ones. Katie spoke about an increase in empathy, which developed as she observed the emotions on the faces of others in the videos. Margie described her feelings of vulnerability and insecurity when she went to the homeless shelter, calling the experience and her reaction “different from what she was used to.” Sophia described how the case studies and perspective taking exercises took the theoretical or conceptual phases and made them real. Sophia stated,

So, I really like the hands on, like the case study type work. I love the current events, the ability to talk about that especially because it was going on during the time was it Missouri the other [educational] institutions and how that kind of what makes it similar or different, that we do we have that same exposure and are we further along on the spectrum and what support services do we have so that we don't end up in that situation.

I like the concrete examples; talking about theory is a little bit more challenging just and that's my personality and my feel towards experiences more technical and hands on. So, I really like those, I like case studies, I like the current events ones better than that are just text based ones.

Then the conversation, I like the, I really like when there is two sides of the story and if you hear both sides. Both opinions are in this room, because I think that makes far more valuable learning experience than we all know that was wrong. So, we all agree and we can move on. Versus having both sides of that story and so you had us do, with the law surrounding, it was a store that refused to serve [a gay couple]. Having like,

being able to be in a group where you might not have agreed with the opinion but you still had to think about how they got there and what their support was, that was eye opening.

Because everybody sat in the room and they all knew something was wrong and they all felt one way about it, but putting them in the position where they had to think outside the box, like if you were in this, if you were the owner of the restaurant, how did you get, like get there legitimately? There are legitimate ways of how they probably got there based on how they were raised and what exposure they have had and how did they do that, that was an interesting project.

Some of these experiential program content features especially resonated with those participants who had limited previous experiences with diversity and inclusion.

Objective data. Several participants pointed to the power of objective data, primarily the Intercultural Development Inventory (Hammer, 2012), which half of the participants (Delia, Esther, Matthew, Joseph, and Katie) mentioned, and the privilege exercise, which three of them (Gabriel, Joshua, and Sophia) identified. Furthermore, readings, group projects, current events, the other culture activity, and videos also provided some form of objective data, because they presented both historical facts and third-party emotions, and these sources probably had a greater impact than would have occurred if the primary facilitator tried to present these perspectives herself. For example, Katie found the visual elements more useful than discussions. For many participants, objective data were the source of a disorienting dilemma or emotional opening point.

Delia related her reaction to taking the Intercultural Development Inventory (IDI):

So when I did the IDI, I was like, I've got this on lock, I'm good. Like, my sister is married to a Black man, and they've got kids, like, you know, and I was so kind of blown away by the fact that I was in this place that is actually not as far along as I thought I was. Um, so I think, where I lived was, I lived in this place where the way that you acknowledged differences was by not acknowledging it. The way you show that you are evolved is by being color blind or gender blind.

Matthew described his appreciation of activities and frameworks that illustrated principles of the program:

So, I mean I think like the presentations or like that we had to do something actively, I think was, was really helpful, um, you know, structurally. And, you know, I think that like having some frameworks was also really, you know, being able to be presented different things like, um, you know, like, power or like example of things or like trying to identify things as, you know, what is this and the DMIS [model the IDI is based on].

Disorienting dilemmas. In addition to objective data, external events such as the death of Trayvon Martin, some of the videos shown during the program, such as Jane Elliott's "Brown Eyes, Blues Eyes," and research on unconscious or implicit bias served as disorienting dilemmas for some of the participants. The disorienting dilemma, therefore, served as a dislodging mechanism that allowed for critical reflection to occur. All of the participants who experienced a level of transformation could point to some jarring moments that jolted them to self-reflection.

One of Delia's disorienting dilemmas was an external event, the death of Trayvon Martin, which resonated with her prior experiences of assault: in addition, listening to mothers of color talking about having "the talk" with their sons to help them stay safe in encounters with the police, and her results on the Intercultural Development Inventory, which contradicted her self-concept, further led Delia to open up to the rest of the content in the program. The IDI also provided a disorienting dilemma for Esther and Matthew, who were challenged by some of the conversations. Matthew shared,

I mean I think necessarily at times it was uncomfortable because it was challenging something that I previously you know held or something that was previously comfortable. So, with [Non-traditional Diversity Training Program], there were difficult conversations that we had, but I think those were also really you know some of the most rewarding conversations that I've had at [small, private, northeast college] um because they were real and because I could tell that I was growing and struggling throughout those conversations.

So, I think, so I think it's you know necessarily uncomfortable and I also think that it's stepping into a new world, that it's you know for things that you can unsee and then you know gives a new framework to see the world that sort of grows your world into um like an expanding circle.

Community and safety. The presence of community, meaning the others in their cohorts in the Non-traditional Diversity Training Program, was critical for many participants (Tom, Sophia, Margie, Esther, Stella, and Matthew). These participants felt the discussions enhanced their learning, exposed them to new perspectives, and made the conversations real. Participants also felt supported by the community. Margie expressed this sentiment most explicitly:

It lived up to my experience and expectations because everybody in this class as well was very supportive and helpful. So, I've still not been in too many situations where I felt excluded. So, I hope you'd never offer [Non-traditional Diversity Training Program] online, because it was much more powerful being in person.

Yeah, I took it just out of curiosity and wanting to learn more and wanting to, I like being involved in different things and different people that I don't normally get to work with. So, it's an excellent opportunity to get to know people. I think I got to know pretty much everybody in that group...better than I had beforehand. People like [participant], I had never even spoken to [participant] before class. I didn't even know who he was really. [Participant] I knew a little bit but I had had some really good conversations with her and it's just it really, I keep trying to, and I think part of it too is because I don't have any really close friends . . . a lot my inner circle is very tiny but my next circle out is pretty, there quite a few people in there that I can have good conversations with, not every conversation. So, I keep trying to add to that group.

Stella also shared that she felt there was room for the participants to challenge one another, without judgment, in the community:

The discussions absolutely. I don't know if it was, because we had such a small group. Or I knew there were larger groups and I don't know what that experience was. But for me I felt like our discussions were very

deep, you know what I mean? Like they went where you weren't comfortable to go, and it felt safe, and you could. I could say how I felt and you could tell me how you felt. It wasn't about I'm right or you're wrong or, it was just this is how I feel and then it made you think about things differently or at least consider them differently. So, that I did enjoy.

Esther appreciated taking the journey with others from all levels of the organization and in particular appreciated having a senior administrator in her group:

So, I think, I felt really comfortable asking [the researcher] questions very direct questions. I think I felt like I was supposed to get to a certain point, I don't know whether I did or not, I don't know. I really appreciated, that [vice president] was there, and the, um, spread of people who were there. The way that it was, I felt and, maybe I would have felt differently had [boss] been there. But I felt but with that group I felt, like, um, we could all be free to challenge each other.

In contrast, other participants found community to be a hindrance or felt it had a neutral impact. Delia considered community an initial distraction and had to ignore them to focus on her learning. Joseph also felt like community did not enhance his learning, because the participants were primarily White, and he wanted to put himself in the shoes of non-White people.

Power of program length/having time to struggle. Exploration of the comments of the participants revealed that the length of the program seemed to be an advantage. The average diversity training is about 10 hours long (Bendick et al., 2001), and the Non-traditional Diversity Training Program lasts 25 hours. Reviewing the journeys of several participants, especially those who experienced anger, resistance, and discomfort, indicated that having the luxury of time to “struggle with the material,” as Esther put it, appeared to be important to the learning process. Esther stated,

So, what stands out still now in terms of the learning process is that two-day intensive, like reading, or however long it was, after the semester and really being able to dig in and really have the time to have those

really good, full conversations and being, well, like, being able to grapple without—I'm not sure I want to say without judgment, but without fear. So, I think, I felt really comfortable asking you questions, very direct questions.

The extended length of time also allowed both for inclusion of more content, as well as more discussion and time for a variety of activities. The length also allowed for a developmental approach and a sequencing of content, so that the more challenging content appears later on in the program.

Summary of the Chapter

This chapter presented the cross case analysis of the data obtained from the in-depth interviews conducted with the 10 graduates, spanning seven cohorts of the Non-traditional Diversity Training Program, who participated in this research study. Four research questions guided this study and served as an overarching framework for presenting the findings of this study. The first set of findings related to the transformational learning experiences of the program participants, identified the elements that influenced their transformational learning experiences, discerned the impact of the program on participants' pro diversity and inclusion behaviors that have occurred since the completion of the program, and analyzed the aspects of the program that contributed to participants' transformational learning experiences. The next and final chapter will examine the findings relative to the existing literature domains in support of this study. It will also provide conclusions and implications for practice and will elaborate on the contributions of the findings to research and theory. Recommendations for future research presented.

Chapter 6

Discussion, Conclusions, Implications for Practice, Contributions to Research, Theory, and Future Research Recommendations

Introduction

This chapter begins with a brief summary of the study. A discussion of the findings in relation to the existing literature follows. Next, conclusions are presented, followed by an articulation of the implications for practice as they relate to the higher educational context, managers and leaders in business and industry and other organizational contexts, and human resource development and diversity and inclusion professionals. The overall contributions to research and theory are presented. Finally, this chapter articulates the limitations along with recommendations for future research. The chapter concludes with a summary.

Summary of the Study

The purpose of this study was to understand the transformational learning experiences that may have occurred in a non-traditional diversity training program, along with potential antecedents, outcomes, and program design considerations. The case in this study was a unique training program at a small, private institution in the Northeastern United States, referred to as the Non-traditional Diversity Training Program in this study. This training program was appropriate for in-depth examination because of the ways it differed from other diversity training programs. At 25 hours, the Non-traditional Diversity Training Program was significantly longer than the average diversity training program, which is typically four to 10 hours long (Bendick et al., 2001; SHRM, 2010). Additionally, the content of this diversity training program derived from a wide range of disciplines, including intercultural education, diversity and inclusion, social justice studies, and neuroscience. The Non-traditional Diversity Training Program also features and integrates both diversity educational content, such as models and

theories, and diversity training concepts, such as role playing, behavior modelling, and experiential activities. The participants in the diversity training program were faculty, staff, and administrators from the small, private institution.

Drawing upon Mezirow's (1997) transformative learning theory and Bennett's (1993) developmental model of intercultural sensitivity as the theoretical grounding for the study, the aim was to examine the experiences of participants in this program. The design of this study was a phenomenological embedded case study. A total of 10 graduates, six women and four men, of the Non-traditional Diversity Training Program, representing seven cohorts that spanned five years, from the initial cohort to the most recently graduated cohort, were purposefully selected for participation in the study. In addition to interview responses, program participants submitted reflective journals, which were analyzed for evidence of transformation. Based upon the literature (Cranton & Taylor, 2012), such evidence may include signs of questioning, disorientation, critical reflection, and an expanded or altered frame of reference.

A pilot study with two participants confirmed the feasibility of the design, data collection strategies and procedures, and use of interpretative phenomenological analysis (IPA). The results of the pilot study influenced the main study design by allowing the development of a more refined interview protocol. Following the pilot study, the main study proceeded with interviews with the eight graduates of the program. Including the two pilot interviews, the total sample for this study was 10 participants, which was a reasonable size, based upon the literature in support of IPA (Smith & Osborn, 2007). Sources of data included semi-structured interviews, observations, document reviews, and field notes. The following research questions guided the study:

1. What was the experience of transformational learning for participants in the Non-traditional Diversity Training Program?
2. What influenced participants' transformational learning experiences?

3. How did participants' transformational learning experiences impact their behavior?
4. What aspects of the program contributed to participants' transformational learning?

Face-to-face personal interviews of about an hour in length were conducted using a semi-structured interview protocol. The interviews explored the participants' biographies, including their experiences with diversity and inclusion prior to the program, as well as their learning experiences during the program and the impact of their learning on their behavior after the completion of the program. Interpretative phenomenological analysis was appropriate for processing the interviews because, as creator and primary facilitator of the Non-traditional Diversity Training Program, the primary researcher was an actor in the research study. Further, the goal of the study was to understand the experiences of participants and the sense they made of their experience, which indicated that IPA was an appropriate analytical approach (Smith & Osborn, 2007).

The original intent of the study was to confirm behavioral change through interviews with third parties (family members, co-workers, supervisors, etc.) who were in a position to speak to participants' behavior changes during and after the program. However, the participants were reluctant to provide names, even when they had mentioned third party participants during the interviews. Analysis of the interview data provided the researcher with additional insight about this reluctance. Most people have good intentions, however, they are often very concerned about being viewed as bigoted or prejudiced. As such, the thought of receiving information that might contradict their self-perceptions and good intentions or portray them in a bad light was a threatening experience. Since this intended portion of the study did not prove to be feasible, alternate sources of validation, such as publicly available blogs, course syllabi, and campus events that the participants planned or in which they engaged were reviewed instead to provide some additional confirmation of participants' behavioral changes.

The primary researcher's dissertation chair and methodologist reviewed the interview transcripts and engaged in preliminary coding with the primary researcher to confirm alignment. Additionally, the primary researcher created a portrait of each interview participant, and shared the portraits with the participants as a form of member

checking. The committee chair and methodologist also reviewed the portraits as a form of peer and colleague review and ultimately confirmed all of the findings that emerged. The researcher also maintained an audit trail, thus ensuring that approaches for establishing validity and reliability in the qualitative tradition were achieved.

Discussion and Relation of the Findings to the Existing Literature

This section discusses the findings of the study in relation to the existing literature. Table 17 provides a summary of the findings.

Table 17. Summary of the Findings of the Study

Research Question	Findings
1. What was the experience of transformational learning for participants in the Non-traditional Diversity Training Program?	<ul style="list-style-type: none"> • Seven of 10 participants experienced transformation; 3 did not and only experienced Levels 1 and 2 of learning. Of the 7 who did experience some form of transformation, 5 experienced Levels 3 and 4 of learning, 2 experienced Level 4 learning, the highest and deepest level association with transformation.
2. What influenced participants' transformational learning experiences?	<ul style="list-style-type: none"> • Number of phases of Mezirow's model experienced • Emotional openness/sensitivity • Emotional intelligence/resilience • Importance of critical reflection • Professional orientation • Local primer experiences • Power of antecedent primer experiences
3. How did participants' transformational learning experiences impact their behavior?	<ul style="list-style-type: none"> • All 10 participants pointed to examples of trying on new diversity experiences and roles in cognitive, affective, and behavioral domains. Seven of the 10 participants who experienced transformation highlighted actual behaviors that included: infusing D & I content into his/her work; taking on leadership roles in D & I efforts; becoming more inclusive at work; and, infusing D & I discussions at home with family members • Work environment
4. What aspects of the program contributed to participants' transformational learning?	<ul style="list-style-type: none"> • Voluntary versus mandatory training • Broad versus narrow content • Experiential program content features • Objective data • Disorienting dilemmas • Community and safety • Power of program length/Having time to struggle

Analysis of the interviews determined whether participants had experienced transformative forms of learning, including a transformed point of view and a transformed habit of mind. Five participants experienced a transformed

point of view and two experienced a transformed habit of mind. Three other participants experienced nontransformative forms of learning. The data analysis also determined common themes across the participants. Seven themes emerged from the data and portrayed the elements that influenced participants' transformational learning experiences:

1. Number of phases of Mezirow's model experienced
2. Emotional openness/sensitivity
3. Emotional intelligence/resilience
4. Importance of critical reflection
5. Professional orientation
6. Local primer experiences
7. Power of antecedent primer experiences.

The following sections orient the themes and findings to the existing relevant literature.

Number of phases of Mezirow's model experienced. A study conducted by Brock (2010) confirmed that the more steps or phases of the transformation process participants experienced, the more likely they were to experience transformation. This study's findings aligned with those conclusions. Delia and Esther, who experienced Level 4 transformations, experienced all steps of the model, while the participants who experienced Level 3 transformation (Joseph, Matthew, Tom, Katie, and Margie) experienced five or six steps of the model, and those who experienced nontransformative learning (Gabriel, Sophia, and Stella) experienced four phases of the model. It is likely that in addition to number of steps, the type of steps experienced is also important. For example, Gabriel did not engage in critical reflection, and he did not learn as much one would expect based on his profile at the beginning of the program. Similarly, Sophia did not engage in affective domains, and she also experienced lower levels of learning.

Emotional openness/sensitivity. Participants who experienced Level 3 or 4 learning started the program with a positive or negative affective disposition, such as humility, shame, insecurity, vulnerability, or empathy. Their predispositions allowed for a greater connection on the affective level, a type of learning which is not often addressed in diversity training (Paluck, 2006). This affective interaction helped the participants to open up, which benefitted all participants but had particular value for those who served in business operations. The members of these professions with emotional openness experienced deeper levels of learning than the members of business professions who did not engage in the affective realm. While previous researchers emphasized the role of antecedent experiences in transformation (Hoggan et al., 2017; Taylor & Cranton, 2012), the existing literature did not specifically speak to the impact of an affective disposition. Therefore, this finding and insight was a unique contribution to the literature from this study.

Emotional intelligence/resilience. Emotion appeared to play a central role in the learning process. This finding is critical because Mezirow (1997, 1999) has been criticized for over emphasizing rationality (Boyd & Meyers, 1988; Edwards, 2004; Kovan & Dirks, 2003) and because according to Cranton and Taylor (2012), “The relationship between emotions and transformative learning is not yet well understood, and we know little about emotions and feelings in relation to other factors, such as how they foster and inhibit reflection” (p. 13). Spurred by these criticisms, Mezirow (2000, 2006) later made room for emotional components in the frame of reference and considered the role of emotions in the transformative learning process. Mezirow (2000) specifically named emotional intelligence as a critical need:

Effective participation in discourse and in transformative learning requires emotional maturity-awareness, empathy, and control what Goleman (1993) calls "emotional intelligence-knowing and managing one's emotions, motivating oneself, recognizing emotions in others and handling relationships"-as well as clear thinking. (p. 11)

Furthermore Mezirow (2000) stated,

Cognition has strong affective and cognitive dimensions; all the sensitivity and responsiveness of the Person participates in the invention, discovery, interpretation, and transformation of meaning. Transformative learning, especially when it involves subjective reframing, is often an intensely threatening emotional experience in which we have to become aware of both the assumptions under-girding our ideas and those supporting our emotional responses to the need to change. (p. 7)

These assertions explain why the need to manage perceived threat is critical if learning is to happen.

DiAngelo (2011) coined the term *White fragility* to refer to the inability of many White individuals to tolerate racial stress, such as the discomfort that arises over discussions about race and racism, which is a well-documented phenomenon (Kowal, Franklin, & Paradies, 2013; Tatum, 2017). The term has since been applied to many different social identity categories to describe the lack of capacity that exists among some people to engage in difficult conversations about differences. Like Mezirow (2000, 2006), DiAngelo (2011) spoke of the need to build capacity to have these challenging conversations by managing the negative affect that arises as part of the process of engagement. Dawson (2015) also acknowledged, “Recognizing one’s own emotional state and regulating behavior may enable one to take a step back from the emotional attachment to topics of diversity in order to hear and understand the perspectives of others” (p. 4). The emotional resilience skills that are critical in any transformative learning experience become even more important in matters related to diversity and inclusion, because participants might be invested in being viewed as unbiased and non-bigoted, meaning that any implication or information to the contrary activates their threat response (Casey & Murphy Robinson, 2014; Lieberman, Rock, & Cox, 2014). Also, diversity and inclusion content and experiences exist in a politically charged sociocultural and historical context, meaning that the established fault lines and wounds can be quickly triggered, again activating the threat response that causes people to attack, shut down, or act in defensive ways (Dawson, 2015).

In diversity and inclusion training programs, both facilitators and participants need to understand that these emotions are a part of the learning process and find ways to manage them. These insights about emotional resilience supported and added to the literature on the role of emotion in transformation, which has been described as an area where deeper insights are needed (Cranton & Taylor, 2012). The role of emotional resilience has previously been recognized in the intercultural development literature. For example, the Intercultural Effectiveness Scale presents emotional resilience as a subset of hardiness, one of the required competencies for effectiveness in working across difference (Kozai Group, 2011).

Importance of critical reflection. Previous literature has pointed to the importance of critical reflection in transformative learning (Kreber, 2012, Mezirow, 1990, 1998, 2003; Taylor, 2008). Nine of the 10 participants in this study engaged in critical reflection, and this process facilitated their learning, validating the fact that critical reflection and disorienting dilemmas have been the source of an incredible amount of focus and debate in the transformative learning literature because of their centrality to the transformation process (Taylor, 2008; Kitchenham, 2008). The ability to engage in premise reflection, defined by Mezirow (1998) as the critical assessment of the assumptions underlying a particular belief, was an important part of the learning process for participants.

For example, Matthew and Esther were able to engage in premise reflection as they listened to other participants discuss opposing views of an issue. Stella and Tom had their assumptions directly challenged by the primary facilitator, and Delia and Joseph had their assumptions challenged by objective data. Esther related that by asking herself, “What if this was true?” she provided herself permission to engage in premise reflection, which in turn allowed her to experience a “physical shift” in her brain, a process that reflects the transformation of a frame of reference.

Local primer experiences and power of antecedent primer experiences. According to Mezirow (2000), “The justification of much of what we know and believe, our values, and our feelings, depends on the context—

biographical, historical, cultural—in which they are embedded” (p. 3). Therefore, a person’s prior learning and experiences are critical factors in their learning experiences. According to Hoggan et al. (2017),

No pedagogical design can determine the learning outcome independent of the learner’s experience and existing meaning structures. There is a complex interaction between existing meaning structures, the specific experiences causing a disorienting dilemma, the epistemology used to negotiate new meaning structures, and the eventual transformational outcome. (p. 54)

This study’s findings clearly aligned with these statements in the literature. Delia’s experience of being the survivor of an assault caused her to connect with the death of Trayvon Martin and provided a powerful emotional reaction that opened her up to learning. Joseph brought his earlier experience of struggling with his ethnicity, and Esther brought her experience of growing up as an “other.” Matthew’s prior transformative learning experiences influenced his experience, and his upbringing fostered a humility that supported his engagement.

The participants who had spent an extended period of time in the small, Northeastern state brought a similar orientation to the program with regard to difference; these participants viewed individuals as people, rather than as their various identities, and the participants who had little prior experience with diversity, especially racial diversity, needed a different kind of priming than those who had had more diverse experiences. These distinctions indicated that participants are not blank slates when they come to the learning experience. Their prior experiences matter and influence their learning in the program. The existing literature and this study’s findings both supported this point and this study responded to the criticism levied by Taylor & Synder (2012) which claimed that “few studies explore whether there was something unique about the participants’ background, culture, and/or positionality and their experiences in relationship to transformative learning” (p, 43).

The transfer of training and transfer of learning literature is a large domain of research literature, theory, and conceptual writings that are focused on the application and maintenance of new knowledge and skills (Holton, Bates, & Ruona, 2000). A major criticism of the diversity training literature is that, although diversity training may result

in increased awareness, it does not improve attitudes or result in behavior change (Bezrukova et al., 2012; Chrobot-Mason & Quinones, 2002; Kulik & Roberson, 2008). This distinction is critical because these are the most often reported goals of diversity training: the improvement of the treatment of minorities, which is behavioral and linked to attitudes (Bendick, Egan, & Lofhjelm, 2001; Kulik, 2014; McKay et al., 2008; Paluck & Green, 2009). The response from scholars has been calls for studies focused on diversity trainings' impact on attitudes or prejudice reduction, behavior, and the role of emotion in transformation (Bezrukova et al., 2012; Kalinoski et al., 2012; Paluck, 2006; Taylor & Cranton, 2012).

In terms of behavioral impact, all 10 participants in this study pointed to examples of trying on new diversity experiences and roles in cognitive, affective, and behavioral domains. Seven of the 10 participants who experienced transformation highlighted actual behaviors that included infusing D & I content into his/her work, taking on leadership roles in D & I efforts, becoming more inclusive at work, and infusing D & I discussions at home with family members. In addition, the work environment also played a role in how such behavioral impact could be manifested, which was supported by the seminal literature on transfer of training (Baldwin & Ford, 1998; Blume, Ford, Baldwin, & Huang; 2010; Cromwell & Kolb, 2004; Tannenbaum & Kavanagh, 1995; Velada, Caetano, Michel, Lyons, & Kavanagh, 2007).

According to Holton et al. (2000), the general consensus is that transfer of training is affected by trainee characteristics (personality, motivation, and ability), work environment (support and opportunity to use), and training design (content and strong transfer content). This consensus is largely informed by the work of Baldwin and Ford (1988) and others, including Russ-Eft (2002), Burke and Hutchins (2007, 2008), and Hutchins (2009). The findings from this study offered support for the importance of participant characteristics, work environment, and program design as important impacts of the program on participants.

In terms of the importance of the work environment, in a study focused on motivation to transfer diversity training, Wiethoff (2004) provided a model based on the theory of planned behavior, which aligned with models of

transfer of training. According to the model, domains such as institutional and employer support, perceived value of diversity, and behavioral control impacted organizational motivation to attend and positively engage with diversity training and then transfer the content. This study supported the same model. Participants were encouraged and motivated to attend the Non-traditional Diversity Training Program and have since applied their learning to various degrees, based on perceived institutional support for the initiative. This support has been articulated through influences such as participation by senior leadership, managerial support for participation, institutional celebration of graduates, and expression of institutional commitment to diversity and inclusion through a values statement, strategic plan, and performance review process. Participants who felt that they had supervisor support, most notably Tom, have gone on to impact the campus in a variety of ways; faculty and academic administrators who operated more autonomously (Esther and Delia) have also impacted efforts within their spheres of influence.

Relative to the aspects of the program that contributed to participants' transformational learning, seven themes emerged, many of which are supported by the seminal literature on transfer of training (Baldwin & Ford, 1998; Blume, Ford, Baldwin, & Huang, 2010; Cromwell & Kolb, 2004; Tannenbaum & Kavanagh, 1995; Velada, Caetano, Michel, Lyons, & Kavanagh, 2007):

1. Voluntary versus mandatory training
2. Broad versus narrow content
3. Experiential program content features
4. Objective data
5. Disorienting dilemmas
6. Community and safety
7. Power of program length/Having time to struggle.

Voluntary versus mandatory training. Some studies in the literature identified a negative impact of mandated diversity training (Kulik & Roberson, 2007). The difference here might have been in the lack of remedial

framing associated with the mandates; such framing has been shown to have a negative impact (Holladay, Knight, Paige, & Quiñones, 2003). Role modeling by leaders who both mandated attendance and participated in the program themselves and positive framing appear to have served as a buffer to negative impact upon those whose participation was mandated. Tom shared that positive word of mouth influenced his reaction to mandated participation. Also, his vice president's framing participation in the program as a good thing to do supported the positive word of mouth, and Tom thereby came to know that diversity and inclusion were an institutional priority. Tom's description showed that the mandating did not include remedial overtones. In contrast, Stella explicitly mentioned her displeasure at the lack of role modeling exhibited by her supervisors, who mandated that lower-ranking employees attend the Non-traditional Diversity Training Program first. Other departments in the division mandated that their leaders participate first, sending a strong message, both in terms of institutional commitment and value.

Broad versus narrow content. The literature review contained studies that showed that participants preferred diversity training that looked at difference broadly over single identity training (Bezrukova et al., 2012; Holladay & Quiñones, 2008). Participants also preferred content that focused on similarities, rather than differences (Holladay & Quiñones, 2008). The Non-traditional Diversity Training Content contained both broad content looking at culture and many different identities and patterns, and narrow content, with a mini deep dive on race, allowing for conversations about similarities and differences. The broad content is sequenced first, followed by the narrow content. The Inclusion, and sequencing, of the broad perspective might be a key to participants' acceptance of the narrow focus. The focus on race also comes at the end of the program, after exploration of the general experiences of culture and dominance and non-dominance. Participants had created a sense of comfort with each other and the facilitator; had had an opportunity to share their experiences of exclusion; and built some understanding of themselves as cultural beings, before they engaged in challenging conversations about race. Framing might also be key critical. The Literature review showed that learners preferred diversity training that had a non-remedial framing i.e. this was not about fixing something wrong with participants (Holladay, Knight, Paige, & Quiñones, 2003). The

primary researcher normed the patterns of exclusion and inclusion throughout the program and presented acts of bias as independent of a person's good intentions and values. The primary researcher also presented race as an anchor identity, and suggested that its deeply embedded nature in the United States is the avenue to understanding the challenges and exclusion faced by many other identity groups. The impact of the content and sequencing appears to be positive. When participants described their recognition of privilege, they appeared to be doing so from a racial perspective, which is considered narrow content, but they could also point to several instances where they had been allies to other groups besides people of color.

Experiential program content features. Experiential experiences, such as the Other Culture Activity used in the Non-traditional Diversity Training Program, have been shown to facilitate transformation, especially when participants have the opportunity to reflect on their experiences (Doucet, Grayman-Simpson, & Shapses Wertheim, 2013). This study's findings supported this research. The study also extended the existing literature by explicitly emphasizing the importance of these experiences to those who have had little experience of diversity and to those in professions that nurture a more linear and rational orientation. Participants in these categories need experiences that help them engage in perspective taking and develop empathy for those who are different; these experiences help them engage affective domains during their learning and helps reduce prejudice (Lindsey et al., 2015).

Objective data. Limited, if any, research in the existing diversity literature speaks directly to the power of objective data to facilitate learning about diversity and inclusion, making this finding a unique addition to the literature. Participants found that external information, such as their results on the Intercultural Development Inventory (M. J. Bennett, 1993), results based on their self-reported information, historical context about existing disparities, and data on such disparities supported their learning. These facts, which were either self-sourced information (such as research for a group project they completed as part of the program) or delivered from a non-invested source (such as a documentary narrator) added a level of legitimacy/credibility to the learning process and allowed them to engage in a different way.

These objective data, most notably the results on the Intercultural Development Inventory (M. J. Bennett, 1993), served as a disorienting dilemma for participants such as Delia and Esther, forcing them to confront their assumption about and overestimation of their intercultural competency and sparking their transformative learning journey through critical reflection on the disjuncture. Despite the general lack of attention to this effect, some adult education literature speaks to the power of reflection on historical context. According to Hoggan et al. (2017),

Furthermore, this orientation requires close attention to the logic of practice in a given sociohistorical context and seeks through critical thought to break with the givenness of practices and ideas. Praxis entails a specific type of epistemic break: a rupture which involves a double movement of critical negation and creative exploration. *This critical distance allows individual and collective subjects to deepen their rational understanding of the structural forces which give rise to the order of things.* (p. 57)

Premise reflection requires this sort of socio-historical reflection and examination of assumptions. In this way, the insights from this study supported Hoggan et al.'s (2017) contentions.

Disorienting dilemmas. Disorienting dilemmas were a recurring theme in the participants' interviews and findings, and they were an essential element in their transformation process. Disorienting dilemmas emerged as a major conclusion of this study, in support of the existing literature that showed their importance to the transformation process (Hoggan et al., 2017; Mezirow, 2006). While critical, disorienting dilemmas can have adverse effects on learners (Roberts, 2006), because challenging deeply held and entrenched assumptions and beliefs is threatening. Since these disorientations are an important avenue to transformation, emphasis must be placed on norming the unpleasant emotions they engender, encouraging emotional resilience, and allowing participants to struggle through to a new normal.

Community and safety. The importance of community to transformation has often been discussed in the transformative learning literature (Taylor & Cranton, 2012). Several of the insights from this study supported this literature. Participants such as Matthew, Stella, Margie, and Esther appreciated hearing the perspectives of others,

felt supported by the community, believed there was freedom to challenge, and enjoyed taking the journey with others and building relationships with fellow participants from across the campus community.

However, other participants did not appreciate the community. Joseph felt that the perspectives of the almost all-White community were less valuable, because he was interested in better understanding the experiences of non-White participants. Delia actually found community to be a hindrance to her process, but her comments revealed some nuance to be explored:

I cracked open, and in that, it didn't matter to me anymore that there were people in the group who were being distant about their emotions or who were being preachy. What mattered to me was what am I going to get out of this....and I wanted to listen to you and I wanted to talk about it and I wanted to do the readings and engage and process and I just, it literally, it was just this feeling of like cracking open.

A thoughtful reading of Delia's comments revealed that she found community, not in her fellow participants, but in the readings and in her interactions with the primary facilitator. In some ways, Delia's process and her engagement with it became her support system, and in reading her comments, one does not get a sense that she remained apart from the group or the learning process.

Power of program length/having time to struggle. Critical reflection is, by definition, not an instantaneous process; it requires emotional capacity (Mezirow, 2000). As such, allowing time for a person to cycle through the range of emotions that arise when deeply held assumptions are challenged and to navigate the emotions that prevent them from engaging in the learning process is beneficial. Some intercultural studies have shown that participants can move one standard deviation (i.e., from one developmental stage to another) after 30 to 40 hours of targeted intercultural development (Pedersen, 2010). The insights from this study that revealed that some participants experienced negative emotions such as anger that caused them to shut down, but they were able to recover and reengage. This finding provides support for the practice of investing plentiful time in the learning process, in order to achieve a true paradigm shift. Participants like Tom needed time to deeply reflect on the material after the program

ended, and his continued engagement in diversity and inclusion activities on the campus allowed his learning to take hold and become an established paradigm or lens for engaging with the world.

Major Conclusions of the Study: Integration and Extension of the Existing Literature

In addition to situating the findings within the existing literature on diversity, diversity training and diversity education, the researcher conducted an interdisciplinary analysis of the findings in order to glean deeper insights that support, deepen, and extend the existing literature. Bringing together models and perspectives from multiple fields provided a lens for integrating the findings in a way that provides summary insights and makes new contributions to the literature.

The nature of the problem. While all change is challenging, change related to diversity and inclusion is especially so, because exclusion is systemic and cultural, as well as individual and interpersonal (Adams, 2000; Hardiman, Jackson, & Griffin, 2007). Narratives about others are deeply embedded in culture, and people tacitly absorb them from a very early age (Kashima, Lyons, & Clark, 2013). Exclusion occurs on conscious and unconscious levels, making it critical to go beyond cognitive domains (Greenwald & Banaji, 1995; Greenwald, McGhee, & Schwartz, 1998; Sritharan & Gawronski, 2010) as studies have shown that participants who reported strong positive affect after diversity training revealed reduction in implicit prejudice (Rudman, Ashmore, & Gary, 2001).

In addition, self-examination is challenging. It is especially challenging when people have a positive view of themselves with regards to engaging across difference, when they overestimate their own competence in a particular domain, or when they have limited experience with the domain in question. Bringing three previously discussed concepts, minimization, fragility, and neuroscience, into focus, and connecting them, may illustrate just how entrenched the existing paradigm can be (Figure 2).

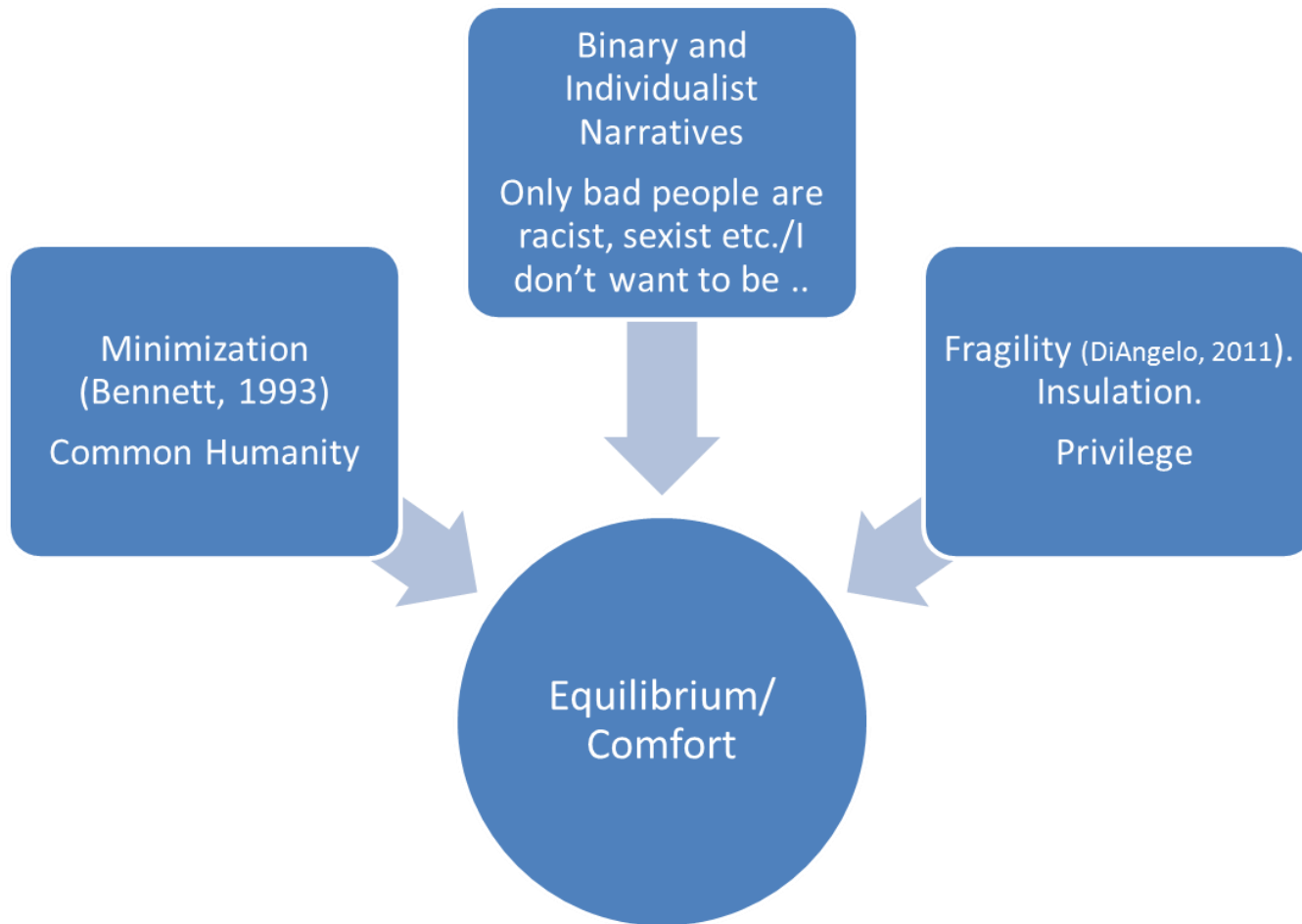


Figure 2. The nature of the problem: Forces supporting an entrenched paradigm/tenuous equilibrium.

Minimization. M. J. Bennett’s (1993) description of minimization depicts a person who is not threatened by difference but overestimates how much he/she knows about other cultures and overemphasizes commonality (through a focus on common humanity over differences). While this is a normative and comfortable intellectual and emotional position for the paradigm holder, the impact of this mindset can be an adherence to an overarching system, such as an organizational culture or economic system, that results in an emphasis on cultural conformity. That is, a person whose viewpoint involves minimization exhibits a tendency to assume similarity or commonality, rather than to recognize and engage with the implications of his/her reactions to differences. Challenging this view of cultural competence likely requires a person to experience a disorienting dilemma, or at least some dissonant or disconfirming information, because the recognition of privilege directly counteracts the mindset of minimization.

Fragility. DiAngelo's (2011) concept of White fragility focuses on White people's inability to tolerate even a minimal amount of stress related to engaging with diversity because they have been insulated by privilege. Recognition of their own fragility is especially jarring because a history of institutional racism has resulted in enduring racial segregation. People tend to live, work, and go to school largely with people like themselves, and they have very little opportunity to become aware of or understand the experiences of others. The systems that support and provide the protection and isolation allow for people to hold onto a self-identity as interculturally competent or progressive without ever having dealt with any real challenge to this self-concept (DiAngelo, 2011).

One force that supports this cocoon effect is a social narrative that frames acts of exclusion primarily as conscious, malicious acts of bigotry, in spite of mounting evidence about the role of implicit processes in exclusion (Greenwald & Banaji, 1995; Greenwald et al., 1998; Sritharan & Gawronski, 2010). Furthermore, this isolation occurs in an era when it is socially undesirable to be bigoted. In essence, people who are aware of the social condemnation of prejudice hold the perception that they are not bigoted and are more interculturally competent than they are. They live in insulation from the experiences of different others and have a limited capacity to deal with the reality that they might act in ways contrary to their inclusive self-perception because the contradictions implicit in the system are never made clear to them. The interaction of these factors, as depicted in Figure 2, creates an illusion, or more accurately, a bubble, which is tenuous, but very comfortable and safe for those who live within it.

This safety, or sense of equilibrium, exists in the bubble, and the privilege of insulation maintains it.

According to Hoggan et al. (2017), groups also act in ways that support this equilibrium:

Consequently, a collective comfort zone exists wherein people protect their collective meaning perspectives to stay in the comfort zone; they avoid voicing critical comments or viewpoints that might be challenging to the harmonious atmosphere of the group or one's sense of being accepted (Mälkki, 2011). (p. 56)

Whatever it is called, this comfort zone or cocoon or bubble is propped up by multiple forces, creating redundancy in the system or worldview and providing very little motivation for people to seek to change their paradigms and realities.

As Mezirow (2000) explained, “We do not make transformative changes in the way we learn as long as what we learn fits comfortably in our existing frames of reference” (p. 7). Comfort is characteristic of the normative diversity and inclusion paradigm, meaning that discomfort is an important part of the transformative learning process. Disorienting dilemmas are the primary source of discomfort (see Figure 3), because being confronted with information that contradicts what one “knows” to be true causes dissonance, and dissonance is uncomfortable and unpleasant (Hoggan et al., 2017). Helping people to recognize the privilege of dominant groups is a prescription of M. J. Bennett’s (1993) developmental model of intercultural sensitivity as facilitators seek to move people from minimization to acceptance.

Following this prescription introduces dissonance, because most people in the West are individualists and view their lives, and cause and effect, on an individual basis, not on a group/social identity basis level or on a systemic level. The meritocracy narrative, *Work hard and you can transform your station in life*, which is a familiar trope in American life, is an illustrative example of this individualistic perspective. This worldview does not allow for any consideration of historical or current barriers and systems that might impact groups of people and make it harder for them to transform their station in life. Furthermore, when individuals from marginalized groups—women, the poor, people of color—do succeed, that success reinforces the narrative that everyone can succeed if they really want to and work hard. Furthermore, when the delicate balance and circular logic of the system is disrupted, and a person finds they must resolve contradictions, their reaction may be very disconcerting.

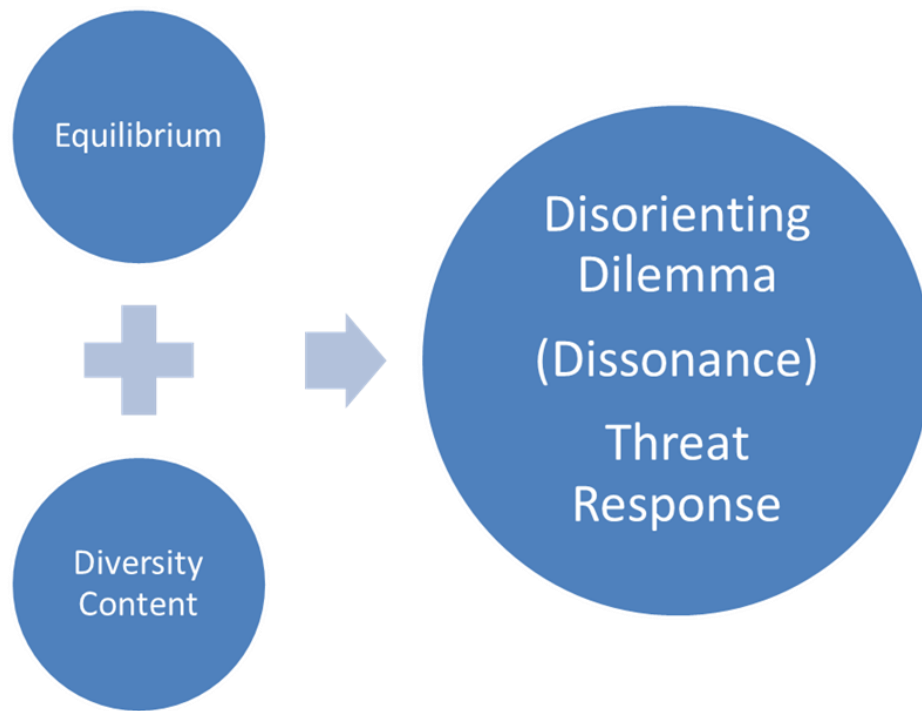


Figure 3. The centrality of a disorienting dilemma.

Neuroscience. Current advances in neuroscience offer an inside look at what happens when disconfirming information is introduced to a prevailing worldview, the reality of fragility and social desirability ensure that confronting normative values and helping a member of a dominant group see privilege will be no easy task. While the main example in this description was race, the analysis applies to a wide variety of identities and experiences, such as gender, socioeconomic status, religion and sexual orientation. Receiving information that suggests that one might not be who he/she believes him- or herself to be is threatening (Mezirow, 2000). Hoggan et al. (2017) articulated this reality:

Unpleasant edge-emotions emerge when [these] meanings, values, and social connections become challenged, when challenged, people's efforts to reflect on their meaning perspectives are faced with an automatic resistance. They feel unpleasant emotions—edge-emotions—such as hurt, shame, frustration, depression, anger, or fear. The edge-emotions tacitly orient their thinking to return to the comfort zone, and

they tend to avoid dealing with the questioned assumptions by explaining the situation in ways that allow them to avoid facing the need to reassess and revise them. (p. 55)

In essence, the perceived threat aroused by challenging information throws the individual perceiving the threat into fight, flight, or freeze mode, a state wherein they are not able to adequately regulate their emotions, think critically, be self-aware, or consider multiple options (Casey & Murphy Robinson, 2014; Lieberman et al., 2014). This stance is not an ideal one for learning.

Thus, for transformation to occur, the self-protective resistance, or anti-learning stance, must be navigated. It is also true that a person must have space to feel and process these negative emotions in order to move beyond them. In speaking about Malkki's (2010) concept of edge emotions and comfort zones, Hoggan et al. (2017) stated,

As the problematized assumptions are guarded by these unpleasant edge-emotions it is yet through these emotions that we can gain access to dealing with those assumptions. That is, instead of striving to avoid unpleasant edge emotions and return to the comfort zone as soon as possible, it may be helpful, or perhaps necessary, to embrace or at least accept the unpleasant emotions for perspective transformation to occur (Mälkki, 2010, 2011). (p. 55)

The two participants who experienced premise reflection, Delia and Esther, clearly reflected the role of strong emotions and activation of the threat response in the transformation process and the need manage and move through these negative emotions. Coding of these interviews illustrates the process of resistance, negative emotions and moving through these to a mental model shift or transformation.

Delia: And I remember going into [Non-traditional Diversity Training Program] and I brought up Trayvon and I mean, I think it was just in that sort of our "What's going on?" check in and I brought it up and I remember choking, I felt so emotional about the situation, it was so, it just blew me away, and I remember thinking about, because Trayvon, Trayvon would have been the same age as my oldest, who, and thinking, how do you do that, how do you that as a [mother]? How do you? [critical reflection] and then realizing that

for many [mothers], living in certain areas, and I remember hearing about, on NPR, on one of the, I don't know if it was this American life, but the idea that, um, graduating from high school, being alive to graduate from high school in many parts of this country, as an African American man, as a young man, that's huge, to be a [mother], who gets your son, through 18 years of life, and he's alive and he walks across that stage, is bigger than anything you can imagine. And all of this stuff just came together. And then the violence and the fact that that happened in Florida and what happened to me happened in Florida [personal connection], and um, it just was, there were a lot of things that clicked for me, um, and it made me start. I think what happened was, I just opened it, it just...I cracked open [transformation].

And I think the other was that I resisted the idea that I was in some way privileged. [threat to self-concept/disorientation] Like that really ate at me and I can remember being angry [threat response], like I can remember going home and being like, I don't know, why am I doing this, this is, why do I want to sit for two hours and be told that I am not a good person. Like that's the way it felt to me, and it was funny because at the same time, one of my colleague's husbands, they were doing sensitivity training and he was like, she would tell me stories about how angry he was. He would come home and be so angry and I wasn't feeling that strongly [shared laughter], but I definitely was like, what is that about. I am so bugged and then, and then Trayvon, and I can remember, so the Trayvon thing happened [external connecting/ empathy building event/disorienting dilemma], I remember, reading about it, and then I heard about it, and it was like, maybe it was a day before the, we had an [Non-traditional Diversity Training Program] session and I remember thinking about my [bi-racial] nephew and thinking oh my god, I hope, my brother-in-law is teaching him, just to be like, aware of this stuff [personal connection]. And then feeling, I was blown away by this feeling that this happened and back then, it was isolated, right? Like back then it was this isolated thing, it's not like today when you realize it is happening all the time. . . . I think it was like I started, everything just went like click click click click click into place. [Shift]

A similar process occurred with Esther:

When I saw that question again, I went, “huh,” maybe not, maybe in this circle we are fundamentally the same but there are these other circles that I am not aware of. So I was really consciously aware of that and since that time have been aware of how I, I mean I still do it, because I am aware that I make generalizations more typically about women.....Women, we all bond together. We all feel this way, which is not true [critical awareness].

Then the other one was that conversation that we had about racism. We had [a participant] really is struggling out loud. Saying, “Wait you are telling that I am racist.” Everything that he was going through out loud, I was going through in my head [disorientation, resistance]. That was really profound for me, but once I kind, of yeah, once I was willing to look at it from a different perspective to kind of say, “Oh, no, what if, okay, what if I look at it from this perspective? What does it mean?, right?” [critical reflection] And that it would shift to that being, like almost like it would physically shift my brain so that I feel really strongly about that now.[transformation]. I think this happens to me when something that is inherent in my thinking is so deeply engrained that I can't see the world any other way. Over time, with the right exposure, there may be chinks or cracks or some other challenge to that thinking, but I stick to what I know [underlying habits of mind remain unchanged]. Then, somehow, there's one tap or push that's just strong enough to send a ripple effect—or like an egg cracking [disorientation] where it starts in one place but spreads across the egg. Then I have to pay attention. And then it's almost as if the neurons in my brain say "Right, that was no good. This is the way to think now," and they immediately build a new path that usually ends up feeling so much better than it did before. But it is really, for lack of a better term, physiological. The brain, or thinking feels different. It's clearer, more direct.

In both of these situations, participants received information that threatened their self-concepts, and they initially resisted but then engaged in critical reflection and leveraged their abilities to be self-reflective and empathetic and moved through resistance to a new worldview. It is obvious that these two participants experienced a profound and fundamental shift, so profound, in fact, that it gives credence to Illeris's (2014) assertion that thinking of transformative learning as a fundamental change in identity as this description fully encompasses the cognitive, affective and behavioral changes that occurred.

These two participants who experienced premise reflection and ultimately a transformed habit of mind, along with those other participants who experienced some form of transformative learning in this study provided confirmation of this point. They survived or accepted their negative emotions and moved beyond these emotions to learn. Affect is critical to transformation, and both positive forms such as empathy and negative forms such as resistance must have space and be embraced in the learning process (Figure 4).

Implications for Practice and Contributions to Research and Theory

The interdisciplinary analysis of the findings and the major conclusions provide insights that can be useful to diversity and inclusion practitioners, leaders and managers, and scholars. Findings of this study also provide implications for future theory and research.

Insights for diversity and inclusion practitioners. With the deeper insight into the entrenched assumptions that make transformative learning for inclusion hard, including fragility, minimization, social desirability, and the brain's self-protection/defense mechanisms, diversity practitioners and trainers can use design interventions that take these realities into consideration. Figure 5 presents four critical recommendations to combat the forces that support and protect entrenched assumptions. In order to combat the defensive mechanisms that activate when people have their positive self-perception or social desirability challenged, trainers must change or expand the narrative.

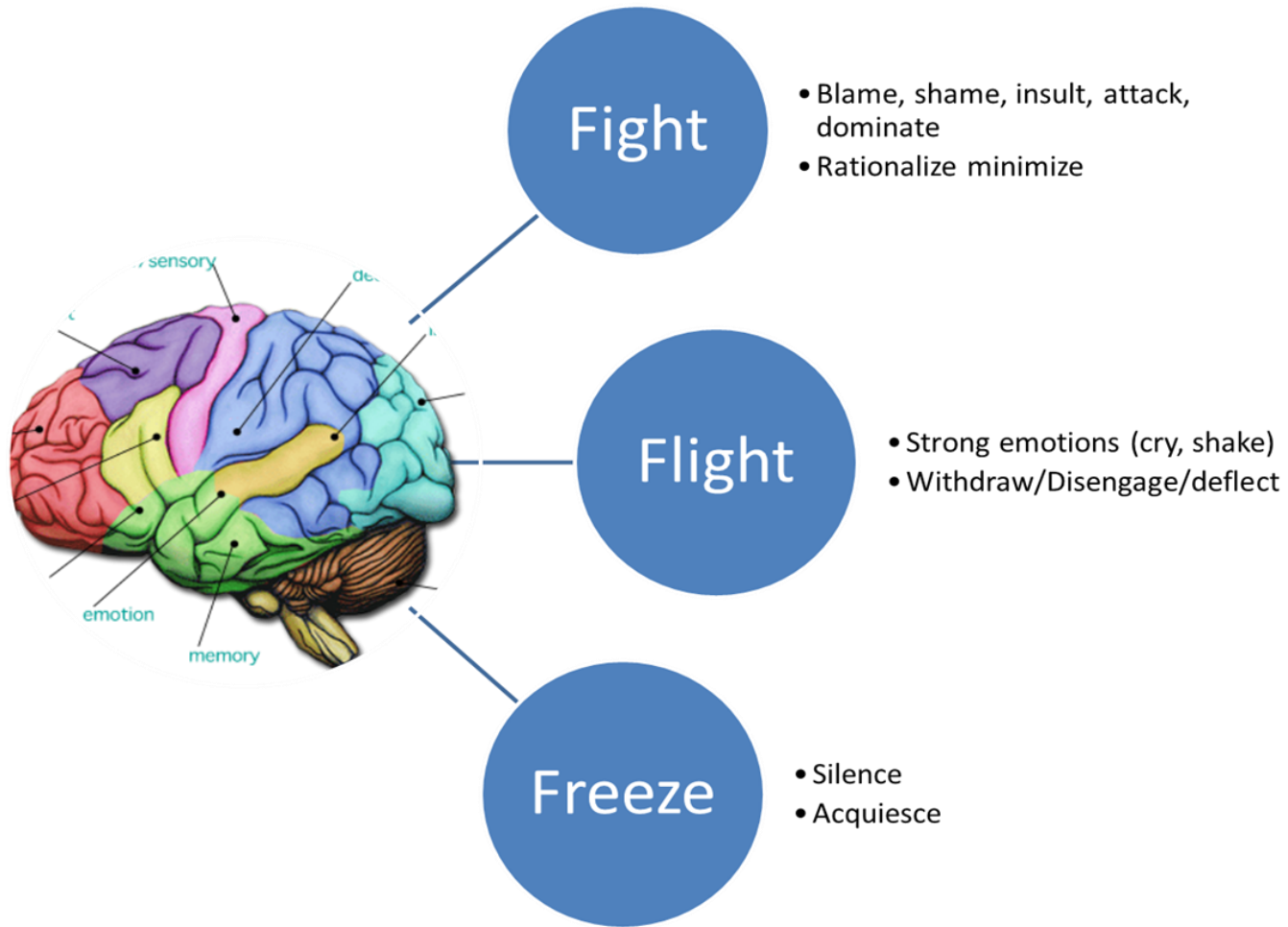


Figure 4. The impact of a disorienting dilemma and role of affect/emotions in transformation.

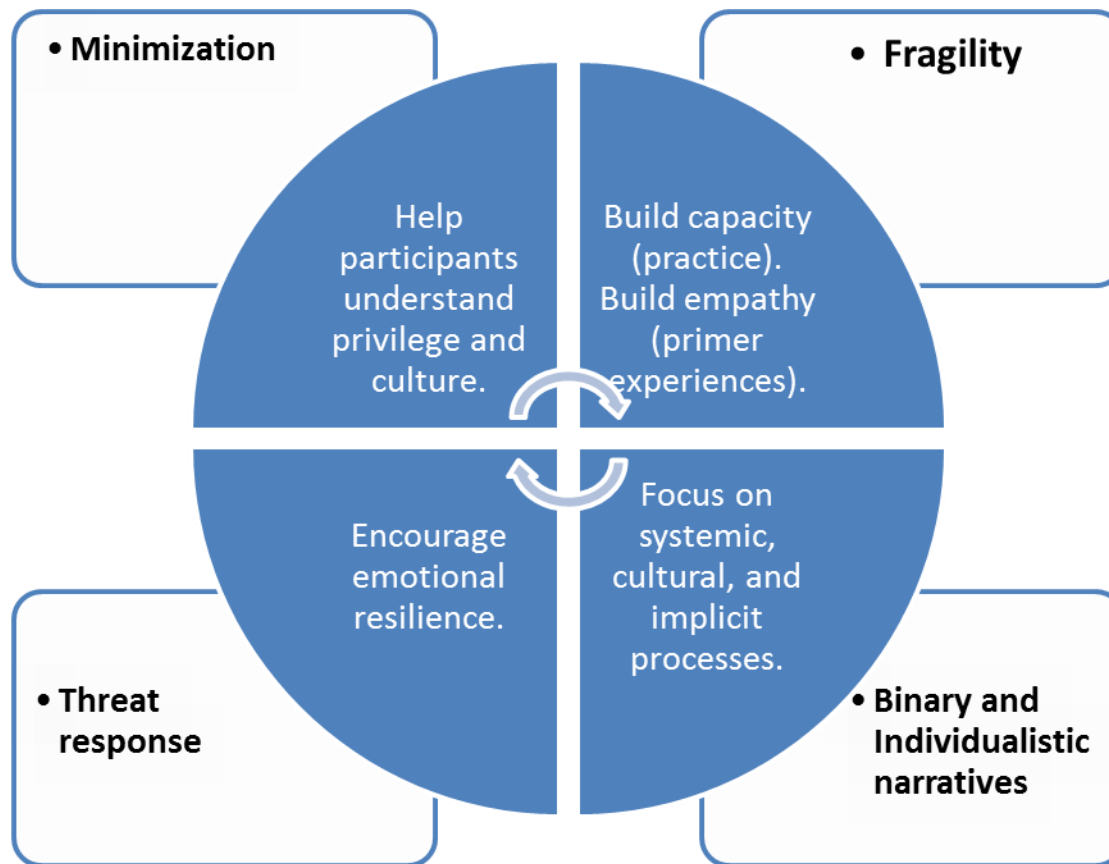


Figure 5. Facilitating transformation by counteracting the forces supporting the status quo.

Acts of bias are often unconscious and contrary to people’s good intentions (Sue et al., 2007), and disparities result from more than interpersonal actions. Changing the narrative from a binary—bad or good, bigoted or not—paradigm ensures that people’s goodness, good intentions, and values are not in jeopardy during conversations about diversity and inclusion. This process is a competency that can be developed through experience, exposure, and education (J. M. Bennett & Bennett, 2004), regardless of a person’s starting point.

Building in activities that develop empathy is another technique to which diversity trainers should attend, as they provide motivation for people to stay engaged in conversations that might be challenging or difficult. Activities in the Non-traditional Diversity Training Program that built empathy included the other culture activity, videos, and perspective taking exercises. These activities engaged the affective domains, allowing for deeper learning and for transformation.

In order to combat fragility, participants must have a way to build capacity to tolerate more racial or other identity-based stress, usually aroused when training participants are confronted with information that contradicts their self-perception or suggestions that they might be contributing to an experience of exclusion for others. Neuroscientific research has enhanced understanding of how the brain operates around difference and how the unconscious brain works (Casey & Murphy Robinson, 2014; Lieberman et al., 2014). Trainers can leverage this information by bringing people into the conversation and helping them understand what is going on when challenging content is introduced.

Trainees can be made aware that their threat response will be activated, that the true way forward is through the negative emotions, and that the discomfort is an essential part of their learning. Trainers can also remind them that their personal values will be assailed and can help participants better manage their reactions and help them reengage when they shut down. Diversity trainers can also help participants understand that as they build capacity in diversity conversations and interactions, the process will become less uncomfortable.

Table 18 depicts the linking of Mezirow's (1997) theory with Bennett's (1993) developmental model of intercultural sensitivity, which both undergirded this study. Specifically, the prescriptions for moving participants from minimization towards acceptance, the beginnings of an ethno-relative mindset, the phases of transformative learning, and their integration can yield further insights for practitioners based upon findings from participants' experiences of transformational learning in the Non-traditional Diversity Training Program.

Table 18. Linking Mezirow's (1997) Transformative Learning and Bennett's (1993) Developmental Model of Intercultural Sensitivity and the Findings from the Non-traditional Diversity Training Program

Dimension	DMIS Prescription	Transformative Learning Phases	Non-traditional Diversity Training Program
Primary Task	<ul style="list-style-type: none"> • Develop self-awareness; focus primarily on cultural self-awareness. 	Facilitate critical self-reflection, particularly premise reflection to transform frames of reference.	<ul style="list-style-type: none"> • Help participants recognize they have a culture. • Help participants understand the systemic nature of exclusion and the role of the brain and implicit process in exclusion and inclusion. • Encourage pro diversity behaviors. • Administer Intercultural Development Inventory. • Construct privilege table.
Support	<ul style="list-style-type: none"> • Educators should emphasize moderate support. • Support learners through content that focuses on definitions and some subjective cultural differences and processes that avoid excessive cultural contrasts and expand curiosity about their own culture to that of others. • Participants experience of difference: moderate challenge. 	Support facilitated by recognition experience is shared.	<ul style="list-style-type: none"> • Community building exercises, such as dyad and small group discussions. • Primary researcher's norming of the experience by sharing her own ethnocentricity and biases. • Changing the narrative from good or bad and shifting the focus from solely explicit or individual actions. • Validating people's value.
Content	<ul style="list-style-type: none"> • Challenge the learners through content that focuses on frameworks for understanding their own culture, including values, and beliefs, the privilege of dominant groups, and using authentic materials from their own culture. 	Content fosters critical reflection, usually leading to self-examination with feelings of shame and guilt.	<ul style="list-style-type: none"> • Teach patterns of dominance and non-dominance. • Other culture activities. • Focus on race as a construction and a system. • Perspective taking exercises. • Neuroscience information, including implicit processes/unconscious bias.

Table 18. Linking Mezirow's (1997) Transformative Learning and Bennett's (1993) Developmental Model of Intercultural Sensitivity and the Findings from the Non-traditional Diversity Training Program (continued)

Dimension	DMIS Prescription	Transformative Learning Phases	Non-traditional Diversity Training Program
Process	Facilitate contact with ethnorelative resource persons in structured activities. Structure opportunities for difference-seeking. Use selected and trained ethnorelative resource persons.	Provide opportunities. Disorienting dilemma. Exploring options. Trying on new behaviors. Building confidence and competence.	<ul style="list-style-type: none"> • Use cultural and societal frameworks over individual ones. • Allow opportunities for all parties to share their pain and experience of otherness, regardless of their primary identity. • Allow opportunities for participants to build empathy for those different from them through activities like video watching, perspective taking exercises, and the other cultural activity. • Use objective and third party data, such as documentaries and readings. • Help build competence, and confidence through behavioral modeling activities such as scenarios and role plays. • Deepen learning/continue engagement with post-graduation projects. • Facilitator normed behavior by sharing her own instances where she was exclusive.

From "Towards a Developmental Model of Intercultural Sensitivity," by M. J. Bennett, 2011. Retrieved from http://www.idrinstitute.org/allegati/IDRI_t_Pubblicazioni/47/FILE_Documento_Bennett_DMIS_12pp_quotes_rev_2011.pdf. Copyright 2011 by M. J. Bennett. Reprinted with permission.

M. J. Bennett's (1993) recommendation for moving participants from minimization to acceptance involves an emphasis on the development of self-awareness, which requires critical reflection, the hallmark of transformative learning. Many parts of an individual's culture, especially its values and norms, are invisible to the members of the culture. This axiom holds especially true in individualistic communities. As such, individuals must come to understand that most of their thoughts, values, and actions are culturally determined. Early prescribed activities to help support the learners in their understanding of themselves as cultural beings include an introduction to cultural norms, values, and communication styles. Using the lens of transformative learning theory provides support through the recognition of shared struggle and experience, and community nurtures the learning and development process. The Non-traditional Diversity Training Program apparently followed both of these prescriptions by providing

content about subjective cultural differences and engineering opportunities to norm participants' prior ignorance and current struggles and to build community. The findings from this study suggest that the integration of Mezirow's (1997) theory and M. J. Bennett's (1993) model can favorably influence transformational learning to occur.

In moving from the developmental model of intercultural sensitivity's (DMIS) focus on supporting the learners to its prescription for challenging them, the utility of a transformative learning process is apparent. As evidenced in this study and prior research, a disorienting dilemma is necessary to dislodge participants from their comfortable self-assessment of their intercultural development, and critical reflection is needed to help participants see themselves as cultural beings who are part of dominant groups and who are benefiting from a system that advantages some and not others. This disorienting dilemma, if explored (as opposed to resisted), leads to self-examination and critical reflection, as Mezirow (1997) stated, often accompanied by shame or guilt.

The presence of a supportive community, either of fellow strugglers or nonjudgmental facilitators, can ease this process. The recognition of one's privilege and the impact that comes after disorientation and critical reflection is paradigm shifting, often leading to an exploration of new options and attempts at new behaviors, as exhibited by the participants interviewed. These processes were borne out by the experiences of interview participants who experienced Level 3 or 4 transformative learning. These participants moved from their disorienting dilemma, through a period of critical reflection and self-examination, to an exploration of options and trying on of new roles. The participants shared elements of the program that assisted them in their transformational learning. The Intercultural Development Inventory and the privilege walk table are examples of activities that were part of the NDTP that helped foster a disorienting dilemma. Other content that followed the prescription to focus on the privilege on dominant groups and supported a disorienting dilemma included a look at race as a system, rather than as a series of individual or interpersonal acts as a bigot and a focus on the role of the brain and implicit processes, such as unconscious bias.

Process is as important as content, and both the theory and model have prescriptions for processes that complement the prescribed content. Transformative learning focuses on the importance of disorienting dilemmas and critical reflection, and the developmental model of intercultural sensitivity focuses on the opportunity for learners to have structured opportunities for difference seeking and contact with ethno-relative people. Prescribed transformative learning theory phases speak to, and/or allow for, exploration of options, trying on new behaviors, and building competence and confidences. Similarly, the Non-traditional Diversity Training Program allowed participants to engage with different others through videos that shared perspectives and emotions of culturally different others and the other culture activity, which allowed participants to walk a mile in someone else's shoes. These experiences built empathy, ensuring that engagement was affective as well as cognitive.

Journals and class discussions supported important critical reflection throughout the program and role plays; scenarios and perspective-taking activities supported skill building, increasing the likelihood that learning would transfer into behavior. Interestingly, while the developmental model of intercultural sensitivity and transformative learning theory are complementary models that support intercultural development, their process prescriptions differ in one key area: sequencing. The DMIS prescribes a support-challenge process whereas, the process of transformation begins with the challenge of a disorienting dilemma, followed by the support of a community. Recognizing the values of support and challenge, the primary facilitator attempted to employ a support-challenge-support model that honored the prescriptions of both models.

These design insights reveal that critical attention needs to be paid to both content and process, support and challenge, community and individual development, and intentional activities that support growth in cognitive, affective, and behavioral domains. Further, a variety of learning styles and entering points must be built into diversity training programs to maximize learning. Diversity training, like other diversity and inclusion efforts, must be as multifaceted and complex as humans are to be effective. It is important to note that these insights derived from participants who experienced transformation. Three participants in this study did not experience transformation.

While not engaging in critical reflection is supported by the extant literature as a reason for not experiencing transformation (Jones & Charteris, 2017; Mezirow, 1990, 1998), that explanation applied to one out of the three participants. There is, therefore, a need to consider what other kinds of learning interventions might be appropriate and effective for the participants in this study who did not experience transformation and others like them.

Insights for leaders and managers. The findings of this study also provided insights for leaders and managers who want to develop their intercultural competence and create more inclusive working environments. In linking intercultural competence, transformative learning, and neuroscience, this study will assist leaders and managers by more explicitly presenting inclusive behavior as a critical leadership competency. Following a review of Goleman's (1995) model of emotional intelligence, the four dimensions of emotional intelligence, self-awareness, self-management, other awareness, and other management, emerged as critical components of developing both emotional intelligence and inclusive behaviors. In many ways, on the individual and interpersonal levels, this is the concept being discussed, applied in different ways. In order to be an inclusive leader, a person must be aware of his/her own norms, biases, values, and styles. Further, individuals must be aware of the impact of these ways of being and acting on others and the environment, while managing them to ensure they have the desired impact. Similarly, an inclusive manager is aware of other's ways of being and their impact and can manage relationships, teams, and organizations comprised of a wide variety of backgrounds and cultures in order to maximize the potential of the organization and the people who comprise it.

The study's findings also support leaders who are seeking to build inclusive environments. First, leaders may have a way to frame the conversation. Describing a diversity and inclusion effort as an opportunity to develop critical leadership competencies and maximize the potential of employees, teams, and organizations has a different impact than a compliance framing (e.g., "We don't want to run afoul of the government," or "We don't want to be sued.") or a remedial framing (e.g., "There are bad people, racist, sexists, anti-Semites, etc., who need to be fixed or

‘underprivileged’ people who need to be supported.”). To use a popular colloquial phrase, the idea is about running to something, rather than running from something.

Furthermore, HRD practitioners, who serve as critical strategic partners to business leaders, can use the insights from this study to help organizational leaders create the frame or infrastructure they need for inclusion. For example, understanding the length of time required for transformation, as validated by this study, can allow HRD practitioners to make the case to organizational leaders that they must commit sufficient time to engage in significant diversity and inclusion learning and conversations in order to support positive change.

Understanding fragility, HRD practitioners can coach leaders to build capacity for conversations that feel uncomfortable and allow time to process the discomfort, as it is inevitable that individuals have their self-concepts challenged and different world views will come into contact and conflict. Encouraging participants to stay with the conversation and modeling both tenacity and a willingness to sit with discomfort will be a critical need for leaders and the HRD practitioners who support them. A final contribution to practice is that the findings from this study reinforce some of the research and tested wisdom in the general training field related to transfer of training such as supervisor and peer support, values of the training to job rewards, and opportunities to practice, which all hold true in the diversity training arena and should be considered in training design.

Insights for higher education institutions and educators. This study was situated within a higher education institution, and examined participants’ transformational learning experiences within a unique non-traditional diversity training program. The participants of this program were mainly employees who were faculty members, staff members or administrators, but not students within the higher education institution. Therefore, the findings from this study have a number of implications for higher education institutions.

Affect. Most higher educational institutions have as a goal the development of global and ethical citizens. Educators within higher education institutions must understand that these goals inherently contain the promise of transformation, because most students come in with an ethnocentric and monocultural mindset. But fostering

transformation is challenging. Transformative learning scholars have referred to the process as disruptive, disorienting, and catastrophic (Berger, 2004; Brookfield, 1994; Doucet et al., 2013; Hoggan et al., 2017; Mälkki, 2010; Mälkki & Green, 2014). Therefore, ethical considerations arise for researchers who seek to foster transformation through these disorienting dilemmas, as participants must deal with the impact of disorientating dilemmas long after the disorienting event. Researchers have an ethical responsibility to design experiences in a way that support a process of moving through the disorientation to reintegration and a new equilibrium point (Mezirow, 2000). Tisdell (2008) acknowledged that humor and media could be catalysts for transformation because of their ability to draw people into the experiences of others and build empathy. This recommendation suggests also that alternate pathways for transformation might exist.

Curricular initiatives have explicitly focused on cognitive and rational processes, and faculty have often found themselves unwilling and unprepared to handle emotionally charged discussions in the classroom, with some faculty believing that the classroom is not the right place for these discussions. This orientation stands in direct contradiction to what this study revealed about how the process of transformation happens, but it is likely that many faculty members are not aware of this dynamic. Therefore, a need exists to have explicit conversations about what global citizenship means, the path to get there, how transformation is needed to foster global citizenship, and how affect, including negative affect, is an important part of the transformation process. Support should be provided to help faculty members build capacity to handle emotionally charged material in the classroom.

Primer experiences. The power of experiential and immersive activities to support learning and intercultural development is well known (Kuh, 2008). However, there has been an overemphasis on the international immersion. As critical as these experiences are, they are not the only ones that can support learning. Additionally, research in the study abroad field shows how important it is to intentionally foster critical reflection and activities that support intercultural development, rather than just giving students a travel experience. If these immersion experiences are properly understood as primers that provide a bit of disorientation for the students and help get at affective domains

in order to facilitate learning and transformation, the experiences can be better developed, positioned, and leveraged to maximize learning. Other activities that build empathy, such as videos and perspective taking exercises, can serve as primers and should be incorporated into classes.

Time. Many institutions have one diversity course that touches on many different identity groups or offer a diversity section as part of a course with broader content. It is highly unlikely that these drop-ins or add-ons will lead to significant learning or change. Yet change, and more accurately, transformation is exactly what higher education is promising prospective students and future employers with its emphasis on global citizenship and intercultural competence. A renewed and more intentional focus, beyond touting study abroad numbers, is needed if higher education is to fulfill its potential in this area. Further, as the findings from this study demonstrated, diversity training programs that considerably exceed the minimum number of hours reported in the literature may provide more impactful training for participants. This temporal dimension is an important consideration for designing programs that may yield the types of transformations that are needed to fully embrace diversity and inclusion in organizations.

Contributions to research. The primary contribution of this study to research in the diversity field is the insights that can be gleaned from interdisciplinary thinking and research. The integration of various diversity-related fields, such as intercultural communication, diversity education, diversity training, social psychology, and neuroscience, led to deeper insights than would have been possible with a singular disciplinary lens or approach. Human change is complex, and so is diversity and inclusion. Consequently, the lenses brought to research in this area must be similarly multifaceted in order to understand the processes that facilitate the desired transformation and the outcomes and impact of diversity training.

Previous researchers have called for the integration of diversity and intercultural competence (J. M. Bennett & Bennett, 2004; Fowler, 2006; Sorrells, 2015), and for viewing intercultural competence as a transformative learning process (Taylor, 1994a). Other calls have urged scholars to focus on affective and behavioral domains

(Paluck, 2006) and focus on implicit processes (Greenwald & Banaji, 1995; Greenwald et al., 1998; Sritharan & Gawronski, 2010). Also, scholars have called for a blending of theory and concept-focused diversity education and practical, skill-based diversity training (Hite & McDonald, 2010; C. D. Johnson, 2008; Kulik & Roberson, 2008). This study responded to those calls and extended them by integrating these domains (transformative learning theory, diversity and inclusion, developmental model of intercultural sensitivity, and social psychology) with recent advances in neuroscience to create models complex enough to capture both the main interactions and more nuanced, fluid aspects of the transformation process for program participants.

Contributions to theory. This study yielded insights that support and extend the existing literature related to transformative learning, intercultural development, and diversity and inclusion. The conceptual models created as a consequence of the findings from this study present the forces that support individuals maintaining a status quo, ethnocentric paradigm, and the recommendations for alleviating these forces which is a theoretical contribution to the diversity and inclusion field, helping to bring some much needed maturity and complexity to the field.

Another theoretical contribution of this study to the adult education and human resource development fields is the operationalization of the role of emotions in the transformation process, which has been described as a gap in the literature (Taylor & Cranton, 2012), and the importance of emotional resilience in the process, which allows the learner to encounter and manage the negative affect that is part of the transformation experience as people engage with disorienting dilemmas. Emotions also play an important role in building empathy, and this study has contributed to the literature on the importance of experiential experiences in transformation by highlighting the power of priming participants for learning through experiences that activate the affective domain, whether the experiences happened before the program (antecedent experiences) or during the program through activities such as the other culture experience, videos, and perspective taking exercises.

The layers of complexity and intersections among various diversity and inclusion-related domains revealed through this study is a major contribution to thinking and conceptualizing diversity and inclusion training. Scholars

have been moving away from studying main effects to examining more complex and nuanced outcomes and impacts in evaluating the impact of diversity training and other interventions (Bell & Kravitz, 2008; Kalinoski et al., 2012; van Knippenberg & Schippers, 2007). This study heeded those calls and used a more complex intersectional and layered approach to understand the experience, impact, and outcomes, and design considerations associated with participants' transformational learning in the Non-traditional Diversity Training Program.

Limitations

As with all research, a number of limitations are associated with this study. The first limitation relates to the sample size. Although saturation was achieved and the sample size was deemed appropriate for a study seeking deep insights using the specified design and analysis approach, 10 participants represents a modest sample size.

Additionally, participants were all racially White, although several non-dominant ethnicities were represented. While the participants in the Non-traditional Diversity Training Program reflected the demographics of the institution and state, the racial homogeneity was a limitation of this study. The study was also confined to faculty, staff, and administrators who participated in a particular program at a particular institution in a particular region in the United States. These unique contextual parameters for this study preclude generalizability to other educational contexts, diversity training programs, and regions within the United States. The goal of qualitative research is not to seek generalizability, but rather in-depth understanding. Therefore, despite these limitations, it is quite possible that, through rich, thick description, the utility of these findings for other contexts, programs, and regions can be determined.

Additionally, relying on self-reported data, rather than third party observation, is another limitation of this study, as the original plan to conduct third party interviews did not prove to be feasible. While publicly available artifacts, such as blogs and syllabi were reviewed when available, the absence of extensive observation or third party confirmatory data remains a limitation. However, the focus of phenomenology is on the essence of experience and the meaning an experience has for its participants, and this study does provide a comprehensive articulation of these

transformational learning experiences, along with self-reported behavioral change outcomes. While the study involved participants from multiple cohorts, it was not a longitudinal study, so the study did not explore benefits that might accrue over time. Lastly, having the facilitator of the program as the primary researcher was also a limitation of the study, as the presence of the researcher as agent have had particular impacts on the study with regard to the interpretation of the experiences. However, member checking and peer and colleague examinations were used to ensure authenticity of the findings.

Recommendations for Future Research

The findings and limitations of this study imply several recommendations for future research. These pathways included interviewing other graduates of the program whose journals did not evidence potential transformation to determine why such transformation may or may not have occurred; conducting a similar study with a more racially heterogeneous group; conducting a longitudinal study to better understand how participants experience transformation over time; exploring participants across multiple contexts so comparison data exists; having interviews conducted by a researcher other than the program facilitator to increase objectivity; and accessing additional sources of data, such as observing participants in their work contexts or interviewing their supervisors, coworkers, and/or family members. Since this study focused on the individual level, without adequate recognition of organizational factors that might facilitate or inhibit transformational learning and the transfer of this non-traditional training throughout the organization, exploring such factors represents an area of future research. Last, an important finding from this study was the importance of emotional resilience for managing the negative affect that is part of the transformation process. All of the participants who exhibited this emotional resilience had antecedent experiences that allowed for an emotional openness/sensitivity. Therefore, future studies should deliberately investigate the connection between antecedent experiences, emotional openness/sensitivity, and emotional intelligence/resilience to determine whether this capacity for resilience can be deliberately cultivated.

Researcher Reflections

I was an actor in this study, the designer and facilitator of the Non-traditional Diversity Training Program, as well as primary researcher; therefore, this study provided much opportunity for reflection on my role as an agent of transformation. As I coded and interpreted the transcripts, I wondered what about me as a convener of the space helped or hindered the transformation process. Several participants alluded to the sense of safety they felt and several participants referred to strong emotions, especially anger, elicited by me. I hope these responses indicate that I am able to balance challenge and support in these spaces, and I hope that I allow for people to run the gamut of the emotions as they encounter both challenging and supporting information.

I know that authenticity is an important part of the facilitation process. I believe that sharing my humanity, which includes sharing about the ways privilege operates in my life and the areas where I continue to struggle and grow, is an important part of creating safety and inviting people to be honest and transparent. I think that as an immigrant who developed a racial identity later in life and now conducts diversity training, I bring an interesting perspective to this work. I teach about the construction of race and the historical and systemic forces that impact and influence it with the expectation that people know nothing about these things, because as an immigrant, I did not. I know what it is like to be oblivious about race, even though one is impacted by it, and I know what it is like to have one's identity created outside of racial narratives, because mine was. My experience as an immigrant of color means that I learned about race much later than my American peers of color, making my experiences more similar to those of a White person who typically has had fewer opportunities and reasons to learn about these things. My current lived experience in this skin aligns me with my American peers of color. Therefore, I try to use these dual realities in my diversity and inclusion training, meeting people where they are at but challenging them not to stay there.

Summary

This chapter began by presenting a summary of the study. Following a discussion of the findings of the study relative to the existing literature, the chapter presented conclusions and implications for practice and contributions to

research and theory. The chapter progressed with limitations associated with the study, recommendations for future research, and final reflections by the researcher. The findings of this study demonstrated that diversity training programs are capable of fostering transformation among participants along with a changed frame of reference and that this transformed frame of reference can result in new pro-diversity and inclusion behaviors.

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Appendix A: The University of Texas at Tyler IRB Pilot Study Application

**THE UNIVERSITY OF TEXAS AT TYLER
INSTITUTIONAL REVIEW BOARD**

EXPEDITED and EXEMPT RESEARCH APPLICATION

IRB: F2015-08 Approved by: G Duke Date: <i>November 1, 2015</i>

To qualify for expedited review research must present no more than minimal risk to human subjects and cannot explore sensitive topics. In addition the research must fit the categories of expedited research, per OHRP regulations.

Attach (electronically) to gduke@uttyler.edu with this application, the following:

Written consent form using the UT Tyler Consent Template unless a waiver of written informed consent is requested
 Signature page of Thesis or Dissertation Committee members showing proposal approval for graduate students
 Brief research proposal that outlines background and significance, research design, research questions/hypotheses, data collection instruments and related information, data collection procedures, data analysis procedures. **Most of this can be copied and pasted to relevant parts of the application but please keep B & S brief for the application.**

Human Subject Education Certification for PI, co-investigators, and research assistants participating in recruitment, data collection, data analysis, or, if they have any exposure to identifiable data (if training has not been completed at UT Tyler within a 3 year period of time)

Tool/instrument/survey; if copyright or other issues prohibit electronic form, submit one hard copy

COMPLETE ALL ITEMS TO AVOID DELAY IN IRB APPROVAL

DATE:

10/26/2015

Principal Investigator	<i>Lambert-Aikhionbare, Ame</i>	<i>O</i>
	(Last) (First) (MI)	
PI Title and Credentials	<input type="checkbox"/> Assistant Professor <input type="checkbox"/> Associate Professor <input type="checkbox"/> Professor <input checked="" type="checkbox"/> Student <input type="checkbox"/> Other	

Faculty Sponsor Name and Email if PI is Student	<i>Andrea D. Ellinger, Ph.D. aellinger@uttyler.edu. Rochell McWhorter, Ph.D. RMcWhorter@uttyler.edu</i>
PI Phone	<i>802 489 5876</i>
PI Email	<i>klamberta@aol.com, alambert@champlain.edu</i>
Co-Investigator(s)	<i>Click here to enter text.</i>
Co-Investigator(s) Email and Telephone	<i>Click here to enter text. Click here to enter text.</i>
Secondary Contact Person in Absence of PI	<i>Andrea D. Ellinger</i>
Secondary Contact Person's Telephone and Email	<i>Phone: (903) 566-7310 Email: aellinger@uttyler.edu</i>
Title of Proposed Research	<i>Click here to enter text. A PHENOMENOLOGICAL CASE STUDY OF TRANSFORMATIVE LEARNING IN A NON- TRADITIONAL DIVERSITY TRAINING PROGRAM</i>
Source of Funding	<input type="checkbox"/> NIH <input type="checkbox"/> Local <input type="checkbox"/> Industry <input type="checkbox"/> Other Federal (Specify) <input type="checkbox"/> Other (Specify) <i>Click here to enter text.</i>

Designate the category that qualifies this proposal for what you believe will be either exempt or expedited review (see UT Tyler Exempt and Expedited Categories at the end of this application) and justify this designation by responding to the statements below each category

<p>Type of application: Exempt or Expedited? <i>Expedited</i></p> <p>Category # 6</p> <p>Information Required for Justification (See specific information under each category)</p> <p><i>Data for this pilot study, in advance of the dissertation proposal, will be gathered through semi-structured interviews which will be audio taped, transcribed verbatim, and analyzed with the permission of participants. Participation in this pilot study does not present more than minimal, if any, risks.</i></p>

For proposals involving Personal Health Information (PHI) data: If this is a retrospective chart review (Category 5) (health records research), or, data involves review of PHI, refer to the IRB's HIPAA policies and procedures in the IRB Handbook and complete any appropriate forms. All can be located on the UT Tyler IRB site: <http://www.uttyler.edu/research/compliance/irb/>

2a. Does this protocol include the use of PHI? Yes No

NOTE: *If the protocol includes the use of PHI, refer to the IRB Handbook on HIPAA policies and relevant forms that must be completed before IRB approval can be obtained.*

3. **Purpose of Study:** *The purpose of this study will be to understand the transformational learning experiences that may have occurred in a non-traditional diversity training program, along with potential antecedents and outcomes.*

4. **Research Questions or Hypotheses:** *(1) Did participants have a transformative learning experience during the non-traditional diversity training program? (2) What contextual factors may have influenced the transformation, if it occurred? (3) Did the transformation impact behavior?*

5. **Type of Research Design:** *Qualitative Case Study*

5. **Brief Background and Significance of Study** (include enough to indicate literature gaps and why it is important to do this study):

Existing literature speaks to the positive impact that diversity training has on cognitive outcomes, increasing awareness of diversity issues and increasing awareness of the importance of diversity interventions (Bell & Kravitz, 2008; Bezrukova, Jehn, & Spell, 2012). However, affective and behavioral outcomes, which are the most desired outcomes of diversity training (Bendick et al., 2001) are not being significantly impacted by diversity training. Across disparate strands of research, practice, and disciplines are calls for diversity training design that impact attitudinal prejudices and behavior (Alheji, Garavan, Carbery, O' Brien & McGuire, Forthcoming, p. 22). Recommendations for achieving this goal include integrating the best of diversity training and education components and focusing on contextual factors such as participant characteristics, program length, and content, which Kulik and Roberson (2008) stated are "rarely the direct target of diversity education research" (p. 3), resulting in little knowledge about how these factors impact diversity training effectiveness. Recommendations also include using an intentional transformative learning design that follows recommendations for moving participants from ethnocentrism to ethnorelativism (Bennett, 1998; Taylor, 2004); as such approaches hold promise as a viable avenue to achieving a change in bias and in behavior (Pedersen, 2010; Sritharan and & Bertram Gawronski, 2010; Taylor, 2004).

This study responds to these calls in the literature and Moss-Rascusin, van der Toorn, Dovidio, Brescoll and Grah's (2014) recent assertion that "Research aimed at identifying why successful diversity interventions work will be particularly important for designing new programs tailored to specific audiences, outcomes, and institutional contexts (p. 2). Ultimately, "a better understanding

of the antecedents of diversity training outcomes and an understanding of how diversity beliefs impact the outcomes” (Alheji, Garavan, Carbery, O’ Brien & McGuire, Forthcoming, p. 22) is needed and this research is being done to address these shortcomings..

6. Target Population To Be Studied:

Ages: 18+

Gender: All

Explain below if either gender is to be purposely excluded.

Click here to enter text.

c. Are all racial and ethnic groups included in general recruitment? Yes No

Explain below if a racial or ethnic group is to be purposely excluded.

Click here to enter text.

d. Number of Anticipated Subjects: 2

e. Inclusion Criteria for Sample Eligibility: *Participants will be purposefully selected from a non-traditional diversity training program for faculty and staff that is a voluntary program housed within a college located in the northeast. At present, 7 cohorts of participants have completed the voluntary program and all of the assignments, including reflective journals, have been submitted to the course facilitator of this program. The course facilitator is the primary investigator and has access to these materials. All participants remaining at the institution and those who have left that can be reached will be contacted by the primary investigator to seek permission to review their journals for research purposes. The approved journals will be evaluated for evidence of transformational learning according to Mezirow’s theory of perspective transformation and those exhibiting such potential transformations will be invited to participate in the study. An example of a journal showing evidence of transformative learning is presented below.*

“This program ruined me. I was especially struck by the talk that black mothers have with their children that I do not have to have with mine. I did not think I had my head under a cloud, but boy, there was so much I had not looked at. I can’t get over the talk or Trayvon Martin being dead”...I keep annoying people because I keep bringing it up. But I have to. We are fighting for something that truly truly matters. The more I read, the more I hear, the more I talk, the more I travel, I realize that this is something we all need to commit to. I am deeply thankful for my experience in IU and for the on-going dialogue and I am increasingly impatient with the platitudes and the comfort with life as it has always been lived”... White female participant of the 2nd cohort of the program

Participants who have been identified as showing signs of perspective transformation will be contacted by the primary investigator to voluntarily participate in an interview.

Note: *Any study involving prisoners requires a full board review, and may not be approved under expedited review.*

7. Explain the locations or settings for sample recruitment and data collection:

a. Sample recruitment locations/settings:

The recruitment location is a voluntary non-traditional diversity training program that is housed within a College located in the northeastern part of the USA. Graduates of this program will form the population from which a purposeful sample will be drawn.

b. Data collection locations/settings: The interviews will be conducted on the campus of the college that houses this voluntary diversity training program located in the northeastern part of the USA.

8. Prior to sample recruitment and data collection, who will you first obtain permission to do the recruitment and data collections:

The University Provost and Associate provost for Institutional Assessment are aware of the Primary Researcher's intentions to speak with graduates of the diversity program.

9. Who will be recruiting the sample (humans, records, etc.)?

The primary researcher, who is the advisor/facilitator of the diversity training program will be recruiting the human participants.

10. How will recruitment be done?

Recruitment will be done using email and personal invitations to selected graduates of the program. The email addresses are available in the publically available institutional address book. Purposefully selected graduates of the voluntary non-traditional diversity training program will be contacted and invited to participate in this pilot study.

a. Copy and paste text, graphics, pictures, etc. below from any flyers, ads, letters etc. that are used for recruitment of participants. You may also add these as separate attachments and indicate so in space below.

Dear _____, You have been identified as a potential participant for an upcoming research study (A Phenomenological Case Study of Transformative Learning in a Non-Traditional Diversity Training Program) due to your participation in and graduation from a voluntary non-traditional diversity training program. Your participation in this research project is entirely voluntary. If you agree to participate, you will be involved in one or more of the following activities: You may be asked to schedule a meeting with a researcher to talk about the learning experiences you had in the voluntary non-traditional diversity training program. This interview will be conducted in person. These conversations will be audiotaped with your permission and will be transcribed verbatim for analysis purposes by the primary researcher. No one in the (company/organization) will have access to the audio recordings. You may be asked to schedule another brief follow up meeting, entertain a phone call or engage in an email exchange if more information is needed. If you are interested in participating in this research study, please contact me by email or phone. My contact information is below. Sincerely, Ame Lambert-Aikhionbare Ph.D. Student, The University of Texas at Tyler My phone: (802) 860-2784 My email: klamberta@aol.com

11. **Informed Consent**

Prospective research ordinarily requires written informed consent. If any special classes are eligible to participate, discuss how the consent process will differ. **Inclusion of children (under 18 years) requires permission of at least one parent AND the assent of the child (refer to UT Tyler's Policy on Informed Consent of Children).**

If written consent is to be used, terminology must be about the 8th grade level, or as appropriate for the accurate understanding of the participant or guardian.

If there are questions about the literacy or cognitive level of potential participants, there **must** be evidence that the participant is able to verbalize basic information about the research, their role, time commitment, risks, and the voluntary nature of participating and/or ceasing participation with no adverse consequences.

Please use the template posted under the IRB forms as a guide, and attach as a separate document with the application submission.

Do not copy and paste from this document into consent form. Use simple and easy to understand terminology

12. **This section ONLY for those requesting a waiver or alteration of SIGNED and written informed consent:**

Justify the waiver or alteration in accordance with the following four criteria established under 45CFR46.116(d)(1-4).

All four criteria must be met in order to not have signed written informed consents. In other words, you must answer “yes” to all four of the criteria below in order to NOT have written and signed informed consents.

If you are requesting a waiver of written and signed informed consent, Indicate “yes” if the statement is true about your proposed research:

The research involves no more than minimal risk to the subjects Yes No

2. The waiver or alteration will not adversely affect the rights and welfare of the subjects
 Yes No

3. The research could not practicably be carried out without the waiver or alteration,
 Yes No **AND**

4. Whenever appropriate, the subjects will be provided with additional pertinent information after participation
Yes No.

13. When prospective informed consent is waived, explain how you will obtain permission to use participant's data. If no permission is planned, please explain your rationale.

Click here to enter text.

14. Detailed Data Collection Procedures ATTENTION: Be very specific for this item.

Specify **who, what, when, where, how, duration type of information** for your procedures.

Write this section as if you were giving instructions to another person not familiar with your study.

*Once a participant responds affirmatively to the email or in person invitation to participate in the study, the researcher will then offer 3 time slots within the next week for the participant to choose from. This process will continue until a mutually beneficial time slot has been found. After a time has been set, the interview questions and informed consent form will be emailed to the participant allowing a week for the participant to review and reflect on the questions as well as to sign the informed consent form and return it. The participant will be interviewed during the time period: November, 2015 – December 31st, 2015. In person interviews will be semi-structured in nature and will be audiotaped for verbatim transcription and analysis. The duration of each interview will be approximately one hour. The participant will be told before and after the interview that he/she is free to stop the interview at any time. After the interview is completed, it will be manually transcribed using a word processing program and a copy of the transcript will be sent to the participant to review or correct any of the information in the interview as well as to ask if there is any sensitive information in the transcript that should not be used. **Interview questions.** Since this will be a semi structured interview, there is room for follow up questions to be asked. General semi structured questions for the interview will as follows: 1. Please tell me a little about yourself: your educational and career journey, the things you enjoy about your work, and the values that drive you 2. Please tell me about your perspectives and beliefs about difference, diversity and inclusion prior to your participation in the non-traditional training program. 3. Please tell me about your experiences with, and learning about, difference before your participation in this program. 4. What prompted you to participate in this program? 5. Did your experience in this program impact any of these beliefs or perspectives? 6. Please tell me about your experience with difference, after participation in this program. 7. As you reflect on this program, do any specific moments stand out to you? Why? Can you please describe them to me? 8. Where there any aspects of the program that were particularly important and/or meaningful to you and influenced your learning during the program? Which of these do you think contributed the most to your learning as a participant in this program? 10. Please tell me how the program has impacted you, your thinking and/ or your behavior? In what ways are you different? Please provide specific examples 11. Did your prior diversity learning or experiences influence your experience in this program? If yes, how so? 12. Is the program's impact on your thinking and behavior observable to others? If yes, how so? Can you think of a specific example where others might have observed such thinking and behavior?*

15. Data Analysis Procedures:

Verbatim transcripts made from audiotaping will be analyzed according to the Merriam (2009) method of coding and analysis and Smith and Osborn's (2007) directions for Interpretive Phenomenological analysis (IPA). According to Smith and Osborn (2007), IPA is concerned with "a detailed examination of the participant's life-world" and is concerned with "the participant's subjective perception of an event through the exploration of personal experience" (p. 53). Verbatim transcripts made from audiotaped interviews will be analyzed and a detailed line by line reading and open coding will follow. Examination of these codes will allow for the emergence of themes. Per Merriam's (2009) suggestion, analysis will be a "continuous process, so preliminary notes and themes will be generated after the transcription of each interview" (p. 170-171). The goal of the phenomenological interview is to distill "the essence or basic underlying structure of the meaning of" the transformative experience that occurred during Intercultural U (Merriam, 2009, p. 25), therefore, experiences of different individuals will be coded and compared to identify common and divergent themes and distill the essence of the experience. IPA holds that analysis is by nature interpretive (Smith & Osborn, 2007). As suggested by Smith and Osborn, the transcribed interview is read multiple times for the researcher to become intimately familiar with the account and discover new insights on each reading. Initial comments and associations are recorded in the first stage (coding), with the second reading focused on identifying themes using the theory related material approach described by Ryan and Bernard (2008) and operationalized by Doucet, Grayman-Simpson and Shapses Wertheimazv (2013). This method allows the researcher to code pre-defined phases or experiences of the potential transformative learning process and identify themes in the interviews corresponding to these phases or experiences. Themes will then be connected and/or clustered. Insights from prior analyzed interviews can be used to inform the other or each case can be analyzed independently and then connected (Smith & Osborn, 2007). The last step will involve analyzing a superordinate set of themes and writing them up along with a discussion section.

16. Risks and benefits of this research to the subjects and/or society

Risks: *Minimal: Participant data will not be shared with the employer. No participant names or other identifiable characteristics will be used in future publication/conference papers. Additionally, pseudonyms will be used to protect the identity of the college, the program, and participants. Lastly, the data will be thematically aggregated and only relevant quotes will be used as examples in support of themes.*

Benefits: *Minimal: A summary of the findings will be shared with participants at the conclusion of the study. As a result of this study, participants may gain greater insight into how transformative learning may occur in a non-traditional diversity training program.*

17. **Identifiability of data or specimens:** Will the specimens or data be identifiable?

(NOTE: Any time code numbers are used, or signed consent forms are used, there is ALWAYS potential identifiability of data).

Yes No If yes, complete item 17a

17a. State the type of identification, direct or indirect, on any specimens or data when they are made available to your study team: *Random Code*

Direct Identifiers include subject name, address, social security, etc.

Indirect Identifiers include any number that could be used by the investigator or the source providing the data/specimens to identify a subject, e.g., pathology tracking number, medical record number, sequential or random code number)

18. **Confidentiality and Protection of Data:** Specify how confidentiality will be secured and maintained for research data

For example, locked in file cabinet in office; on password protected computer, location(s) of computer; identifiers and signed consent forms are kept locked in separate entity from data, etc.).

No personal identifiers will connect data with the participants. Further, the audio recordings will be saved on a password-protected computer and the hard drive will be encrypted to protect data. Analysis of documents will remain in the possession of the PI and will be locked in a file drawer in her home/work office. Signed consent forms will be kept in separate location from the transcripts. Printed copies of the transcripts and all other paper documentation will be kept in a locked file cabinet, which only the PI will have access to.

19. **Access to Data:** Specify faculty and staff (members of the study team) permitted to have access to the study data.

Andrea D. Ellinger
Rochell McWhorter

20. **Have all individuals who have access to data been educated about human subject ethics and confidentiality measures?** (NOTE: This is responsibility of PI)

Yes No

21. **If data is on a laptop, acknowledge that the laptop will never be in an insecure location where theft is possible (e.g., in a locked car)**

I acknowledge that data will be on a laptop and that the laptop will never be left in an insecure location.

SIGNATURE OF PRINCIPAL INVESTIGATOR: Signature indicates agreement by the PI to abide by UT Tyler IRB policies and procedures in the UT Tyler Handbook and the Federal Wide Assurance, to the obligations as stated in the “Responsibilities of the Principal Investigator” and to use universal precautions with potential exposure to specimens.

Ame Lambert

10/27/2015

Principal Investigator Signature
Please print name or affix electronic signature.
Electronic submission of this
form by PI indicates signature

Date

Categories for Exempt Research

The following categories for Exempt Research is in compliance with Subpart **46.101(b)** of the Federal Policy for the Protection of Human Subjects, located at:
<http://www.med.umich.edu/irbmed/FederalDocuments/hhs/HHS45CFR46.html#46.101>

1. Research conducted in established or commonly accepted educational settings, involving normal educational practices, such as (i) research on regular and special education instructional strategies, or (ii) research on the effectiveness of or the comparison among instructional techniques, curricula, or classroom management methods.
2. Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior, unless: (i) information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; and (ii) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.
3. Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior that is not exempt under paragraph (2) if (i) the human subjects are elected or appointed public officials or candidates for public office; or (ii) federal statute(s) without exception that the confidentiality of the personally identifiable information will be maintained throughout the research and thereafter.
4. Research involving the collection or study of existing data, documents, records, pathological specimens, or diagnostic specimens, if these sources are publicly available or if the information is recorded by the investigator in such a manner that subjects cannot be identified, directly or through identifiers linked to the subjects.
5. Research and demonstration projects which are conducted by or subject to the approval of Department or Agency heads, and which are designed to study, evaluate, or otherwise

examine: (i) public benefit or service programs, (ii) procedures for obtaining benefits or services under those programs, (iii) possible changes in or alternatives to those programs or procedures, or (iv) possible changes in methods or levels of payment for benefits or services under those programs.

6. Taste and food quality evaluation and consumer acceptance studies, (i) if wholesome foods without additives are consumed or (ii) if a food is consumed that contains a food ingredient at or below the level and for a use found to be safe, or agricultural chemical or environmental contaminant at or below the level found to be safe, by the Food and Drug Administration or approved by the Environmental Protection Agency or the Food Safety and Inspection Service of the U.S. Department of Agriculture.

Categories for Expedited Research

The following describes research activities and categories for expedited reviews:

(A) Research activities that: (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the following categories, as authorized by 45 CFR 46.110 and 21 CFR 56.110. The activities listed should not be deemed to be of minimal risk simply because they are included on this list. Inclusion on this list merely means that the activity is eligible for review through the expedited review procedure when the specific circumstances of the proposed research involve no more than minimal risk to human subjects.

(B) The categories in this list apply regardless of the age of subjects, except as noted.

(C) The expedited review procedure may not be used where identification of the subjects and/or their responses would reasonably place them at risk of criminal or civil liability or be damaging to the subjects in terms of financial standing, employability, insurability, reputation, or be stigmatizing, unless reasonable and appropriate protections will be implemented so that risks related to invasion of privacy and breach of confidentiality are no greater than minimal.

(D) The expedited review procedure may not be used for classified research involving human subjects.

(E) The standard requirements for informed consent (or its waiver, alteration, or exception) apply regardless of the type of review--expedited or convened--utilized by the IRB.

(F) Categories one (1) through seven (7) pertain to both initial and continuing IRB review.

The following categories for Expedited Research is in compliance with 45 CFR 46.110 and 21 CFR 56.110 of the Federal Policy for the Protection of Human Subjects, located at:
<http://www.hhs.gov/ohrp/humansubjects/guidance/expedited98.htm>

RESEARCH CATEGORIES

CATEGORY #1 Clinical studies of drugs and medical devices only when condition (a) or (b) is met.

(a) Research on drugs for which an investigational new drug application (21 CFR Part 312) is not required. (Note: Research on marketed drugs that significantly increases the risks or decreases the acceptability of the risks associated with the use of the product is not eligible for expedited review.)

(b) Research on medical devices for which (i) an investigational device exemption application (21 CFR Part 812) is not required; or (ii) the medical device is cleared/approved for marketing and the medical device is being used in accordance with its cleared/approved labeling.

CATEGORY #2 Collection of blood samples by finger stick, heel stick, ear stick, or venipuncture as follows:

(a) from healthy, nonpregnant adults who weigh at least 110 pounds. For these subjects, the amounts drawn may not exceed 550 ml in an 8 week period and collection may not occur more frequently than 2 times per week; or

(b) from other adults and children [children are defined in the HHS regulations as "persons who have not attained the legal age for consent to treatments or procedures involved in the research, under the applicable law of the jurisdiction in which the research will be conducted." 45 CFR 46.402(a)], considering the age, weight, and health of the subjects, the collection procedure, the amount of blood to be collected, and the frequency with which it will be collected. For these subjects, the amount drawn may not exceed the lesser of 50 ml or 3 ml per kg in an 8 week period and collection may not occur more frequently than 2 times per week.

CATEGORY #3 Prospective collection of biological specimens for research purposes by noninvasive means.

Examples: (a) hair and nail clippings in a nondisfiguring manner; (b) deciduous teeth at time of exfoliation or if routine patient care indicates a need for extraction; (c) permanent teeth if routine patient care indicates a need for extraction; (d) excreta and external secretions (including sweat); (e) uncannulated saliva collected either in an unstimulated fashion or stimulated by chewing gumbase or wax or by applying a dilute citric solution to the tongue; (f) placenta removed at delivery; (g) amniotic fluid obtained at the time of rupture of the membrane prior to or during labor; (h) supra- and subgingival dental plaque and calculus, provided the collection procedure is not more invasive than routine prophylactic scaling of the teeth and the process is accomplished in accordance with accepted prophylactic techniques; (i) mucosal and skin cells collected by buccal scraping or swab, skin swab, or mouth washings; (j) sputum collected after saline mist nebulization.

CATEGORY #4 Collection of data through noninvasive procedures (not involving general anesthesia or sedation) routinely employed in clinical practice, excluding procedures involving x-rays or microwaves.

Where medical devices are employed, they must be cleared/approved for marketing. (Studies intended to evaluate the safety and effectiveness of the medical device are not generally eligible for expedited review, including studies of cleared medical devices for new indications.)

Examples: (a) physical sensors that are applied either to the surface of the body or at a distance and do not involve input of significant amounts of energy into the subject or an invasion of the subject's privacy; (b) weighing or testing sensory acuity; (c) magnetic resonance imaging; (d) electrocardiography, electroencephalography, thermography, detection of naturally occurring radioactivity, electroretinography, ultrasound, diagnostic infrared imaging, doppler blood flow, and echocardiography; (e) moderate exercise, muscular strength testing, body composition assessment, and flexibility testing where appropriate given the age, weight, and health of the individual.

CATEGORY #5 Research involving materials (data, documents, records, or specimens) that have been collected, or will be collected solely for nonresearch purposes (such as medical treatment or diagnosis).

(NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45 CFR 46.101(b)(4). This listing refers only to research that is not exempt.)

CATEGORY #6 Collection of data from voice, video, digital, or image recordings made for research purposes.

CATEGORY #7 Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

(NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45 CFR 46.101(b)(2) and (b)(3). This listing refers only to research that is not exempt.)

CATEGORY #8 Continuing review of research previously approved by the convened IRB as follows:

(a) where (i) the research is permanently closed to the enrollment of new subjects; (ii) all subjects have completed all research-related interventions; and (iii) the research remains active only for long-term follow-up of subjects; or

(b) where no subjects have been enrolled and no additional risks have been identified; or

(c) where the remaining research activities are limited to data analysis.

CATEGORY #9 Continuing review of research, not conducted under an investigational new drug application or investigational device exemption where categories two (2) through eight (8) do not apply but the IRB has determined and documented at a convened meeting that the research involves no greater than minimal risk and no additional risks have been identified.

Appendix B: The University of Texas at Tyler IRB Pilot Study Approval



THE UNIVERSITY OF TEXAS AT TYLER

3900 University Blvd. • Tyler, TX 75799 • 903.565.5774 • FAX: 903.565.5858

Office of Research and Technology

Transfer

Institutional Review Board

March 3, 2016

Dear Ms. Lambert-Aikhionbare,

Your request to conduct the study: *A Phenomenological Case Study of Transformative Learning in a Non-Traditional Diversity Training Program*, IRB #SP2016-77 has been approved by The University of Texas at Tyler Institutional Review Board under expedited review. This approval includes the written informed consents that are attached to this letter, and your assurance of participant knowledge of the following prior to study participation: this is a research study; participation is completely voluntary with no obligations to continue participating, and with no adverse consequences for non- participation; and assurance of confidentiality of their data.

In addition, please ensure that any research assistants are knowledgeable about research ethics and confidentiality, and any co-investigators have completed human protection training within the past three years, and have forwarded their certificates to the IRB office (G. Duke).

Please review the UT Tyler IRB Principal Investigator Responsibilities, and acknowledge your understanding of these responsibilities and the following through return of this email to the IRB Chair within one week after receipt of this approval letter:

- This approval is for one year, as of the date of the approval letter
- **The Progress Report** form must be completed for projects extending past one year. Your protocol will automatically expire on the one year anniversary of this letter if a Progress Report is not submitted, per HHS Regulations prior to that date (45 CFR 46.108(b) and 109(e):
<http://www.hhs.gov/ohrp/policy/contrev0107.html>
- Prompt reporting to the UT Tyler IRB of any proposed changes to this research activity
- **Prompt reporting to the UT Tyler IRB and academic department administration will be done of any unanticipated problems involving risks to subjects or others**
- Suspension or termination of approval may be done if there is evidence of any serious or continuing noncompliance with Federal Regulations or any aberrations in original proposal.
- Any change in proposal procedures must be promptly reported to the IRB prior to implementing any changes except when necessary to eliminate apparent immediate hazards to the subject.

Best of luck in your research, and do not hesitate to contact me if you need any further assistance.

Sincerely,

Justin Velten, PhD, Communication Member, UT
Tyler IRB

Appendix C: Informed Consent to Participate in Research

THE UNIVERSITY OF TEXAS AT TYLER

Informed Consent to Participate in Research

Institutional Review Board #F2015-08

Approval Date: November 1, 2015

Project Title: “A Phenomenological Case Study of Transformative Learning in a Non-Traditional Diversity Training Program”

Principal Investigator: Ame Lambert-Aikhionbare

Participant Name:

Simple Description of Project Purpose: The purpose of this study will be to explore your experiences as a participant in the IU program at C College

Research Procedures: If you agree to be in this study, we will ask you to do the following things:

You will be asked to set up a personal interview with the primary researcher. The interview may be for one hour in length and a subsequent interview or phone conversation (or email exchange) may be needed for clarification purposes. The interview will be recorded with your permission and transcribed verbatim.

You will be asked to examine your transcription for accuracy and will be asked to respond to insights gleaned by the researcher about your experiences to ensure accurate interpretation.

Potential Risks: Participation in this study should not pose any side effects or risks to you as all information shared during the interview will be kept confidential. Your data will not be shared with the college. No participant names or other identifiable characteristics will be used in future publications/conference papers. Additionally, pseudonyms will be used to protect the identity of the college, the program, and participants. Lastly, the data will be thematically aggregated and only relevant quotes will be used as examples in support of themes.

Potential Benefits: A summary of the findings will be shared with participants at the conclusion of the study. As a result of this study, participants may gain greater insight into how transformative learning may occur in a non-traditional diversity training Program

Understanding of Participants:

I have been given a chance to ask any questions about this research study. The researcher has answered my questions. I understand any and all possible risks.

If I sign this consent form I know it means that:

I am taking part in this study because I want to. I chose to take part in this study after having been told about the study and how it will affect me.

I know that I am free to not be in this study. If I choose to not take part in the study, then nothing will happen to me as a result of my choice.

I know that I have been told that if I choose to be in the study, then I can stop at any time. I know that if I do stop being a part of the study, then nothing will happen to me.

I have been promised that that my name or other identifying information will not be in any reports (presentations, publications) about this study unless I give my permission. The UT Tyler Institutional Review Board (the group that makes sure that research is done correctly and that procedures are in place to protect the safety of research participants) may look at the research documents. This is a part of their monitoring procedure and will be kept confidential.

If I have any questions concerning my participation in this project, I will contact the principal researcher:

If I have any questions concerning my rights as a research subject, I will contact Dr. Gloria Duke, Chair of the IRB, at (903) 566-7023, gduke@uttyler.edu.

CONSENT/PERMISSION FOR PARTICIPATION IN THIS RESEARCH STUDY

I have read and understood what has been explained to me. I give my permission to take part in this study as it is explained to me. I give the study researcher permission to register me in this study. I have received a signed copy of this consent form.

Signature of Participant

Date

Witness to Signature

I have discussed this project with the participant, using language that is understandable and appropriate. I believe that I have fully informed this participant of the nature of this study and its possible benefits and risks. I believe the participant understood this explanation.

Researcher/Principal Investigator

Date

Appendix D: Excerpts from Pilot Participant Journals That Influenced Their Selection

Interview 1: White, Female Academic Administrator

This program ruined me. I was especially struck by the talk that Black mothers have with their children that I do not have to have with mine. I did not think I had my head under a cloud, but boy, there was so much I had not looked at. I can't get over the talk of Trayvon Martin being dead. I keep annoying people because I keep bringing it up. But I have to. We are fighting for something that truly, truly matters. The more I read, the more I hear, the more I talk, the more I travel, I realize that this is something we all need to commit to. I am deeply thankful for my experience in IU and for the on-going dialogue, and I am increasingly impatient with the platitudes and the comfort with life as it has always been lived.

Interview 2: White, Hispanic Male Staff Member,

This class definitely opened up a lot for me. I came into it knowing that, at a glance, I epitomize the definition of the "privileged White male," as confirmed by my high dominance score on the Dominant and Subordinated Group Patterns test. Before this class I failed to realize the privilege that comes with male Whiteness, not just in career expectations and opportunities, but also in everyday interactions—like browsing in a store or walking down the street at night, etc. Actions that seem normal and unordinary to me might elicit a much different reaction if I were a darker-skinned man doing those same things.

When I was growing up, I felt as strong desire to bury my ethnicity and be just like my other White friends. My parents came from Spain and Argentina and spoke Spanish as a first language at home, and this caused me a lot of inner turmoil. To me, my heritage and ethnicity was a burden, and I wanted to push it far away from myself. I remember when I was in third grade, I was at a friend's house with a bunch of other boys. When I called my grandmother to check in, I heard all the other boys go silent so they could listen to me speaking Spanish to my grandmother. As soon as I hung up the phone, they all tackled me and called me "Spic" and other ethnic slurs. They

were joking with me, I suppose, but it caused me great shame and henceforth I tried to completely suppress my ethnic background during my grade school and high school years.

When I was applying for colleges, my friends and family kept reminding me that my ethnicity would be beneficial. So, despite my shame for being Hispanic all during my youth, I used it to my advantage whenever I could. Now that I'm older, I'm obviously much more accepting of my family's background, and I regret ever having been ashamed of being a Hispanic male, the son of immigrant parents.

What the [Non-traditional Diversity Program] course starkly reminded me was that my White maleness give me a power which I never even realized I had. While I would never consciously assert dominance due to my appearance, this course reminded me that I wield that dominance everywhere I go. I'm a Hispanic male, but compared to a Hispanic male with darker skin and a strong accent, I am in a much stronger position in society. It's unfair to say the least that, compared with this other rhetorical Hispanic man, I might be judged in a more positive light by society.

There was one particular class where you were talking about how Black men and women in society get stereotyped as being angry or sullen because they don't walk around all day smiling. For some reason, that example really struck home for me—that people can make instant snap judgments on a single person or an entire race or ethnicity—I'm guilty of making these snap judgments myself. When I lived in California, if I were driving in my car, I would make a snap judgment that because a person is Asian, they are a bad driver (DWA—driving while Asian, the saying went). I wonder if there's anything that can ever be done to erase this sort of reactionary thinking in society as a whole.

Biographical Sketch

Ame Lambert-Aikhionbare has worked in diversity and inclusion in higher education for more than a decade. For the last seven years, she has served as a senior administrator at a small, private college in the Northeast and is now serving as the founding Chief Diversity Officer at Roger Williams University. She is passionate about access and success for students and employees and about bringing an interdisciplinary, systemic, and organization development lens to diversity and inclusion efforts in organizations. She is also interested in overlaps between international and domestic diversity matters and inclusion and employee engagement efforts. She has provided diversity training to a variety of nonprofit organizations, spoken at local, regional, and national conferences and served as a reviewer of diversity-related submissions for conferences and journals.

Ame earned her Bachelor of Business Administration in Human Resources Management (2000) from Baylor University and her Masters of Labor Relations and Human Resources (2002) from Michigan State University. Ame was part of the inaugural, 2011 cohort of the Ph.D. in Human Resource Development program at The University of Texas at Tyler. Ame's interests are focused on positive engagement across cultural differences, equity, transformation at the individual and organizational levels, and closing the gaps between aspirations and reality in all facets of life.