

The impact of transformational learning on individuals, families and communities

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This article is based on a larger study (Bennetts 2002) into the Second Chance Trust (SCT) and addresses one major finding from that study, that of transformational learning and its effect on 197 individuals, their close relationships, and their communities. The SCT offers money to those over the age of 30 in South West England to effect change within their lives for the benefit of the wider community. Individuals evaluated transformational learning by the extent of major changes in thinking, feeling, acting, relating and being. Significant transformations fell into the categories of self-transformation, coping with and instigating change in self and others, transformed relationships, increased educational drive, career improvement, and better quality of life. Significant transformations were enabled by giving relatively small grants to individuals within a trusting and supportive relationship. This study supports both Mezirow's (1981) theory of perspective transformation and Boyd and Myers (1988) view of transformative education. Individuals' transitions appear to have been sustained over the years by the knowledge that change is possible, necessary and rewarding. The transitions evolved through a cycle of evaluation of circumstances, assessment of learning need, and adaptation of the present pattern of life required to achieve the new goal. In this context, lifelong learning becomes the norm, a process not a discrete educational event. Sustainability thus becomes the continued ability to learn from change and does not denote a static state.

Background

The learning that adults experience occurs in many settings and is often so taken for granted that the concept of lifelong learning can often seem superfluous. Yet, in recent years, there has been a conceptual move from the theory and practice of adult education with its connotations of planned interventions and courses, to the study of lifelong learning with its multifaceted dimensions of the everyday learning of individuals. It is clear from present debate that our understanding of the many aspects of adult learning is incomplete, and our theoretical base found wanting. However, although the concept of lifelong learning remains open to multiple definitions and interpretations, opportunities exist for research that may assist with our understanding of some of the aspects of learning and change in later life. The Fellowship Scheme (FS) of the Second Chance Trust (SCT) provided one such opportunity.

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The Fellowship Scheme was initiated in 1991 by Michael Young (Lord Young of Dartington) and developed from the ideas and ideals of the Elmhursts who founded the Dartington Trust 70 years ago. It offers small grants of money to people over the age of 30 living in Devon or Cornwall who wish to change the direction of their life for their own benefit and that of the community in which they live. There is no upper age limit and successful applicants are known as Elmgrant Fellows. Mentoring support is available from the Administrator and Fellows are encouraged to use this service. However, the onus is mainly on the Fellows themselves to initiate contact in accordance with one of the Elmhurst's principles, that of achieving self-reliance.

At the time this research took place in May 2002, the SCT had already commissioned two small descriptive reports (Forster 1998, Pether 1998). These initial reports indicated that the scheme was successful in enabling change, and that this success seemed to be about more than simple monetary assistance. However, the factors supporting such change were somewhat opaque and the significance of the changes in the lives of individuals unclear. The full report (Bennetts 2003) on this present study was commissioned by Michael Young some months before his death.

Relevant literature

As the Trust's aim was concerned with transformational learning, the literature search used the key words *learning*, *adult change*, *transitions* and *transformative learning*. This revealed an eclectic knowledge base drawn from psychology and adult education, and provides life-event models, transitional stages and crisis models in the lives of men and women (Jacques 1965, Vaillant 1977, Levinson *et al.* 1978).

Hudson (1999), however, notes that whilst these models enjoyed popularity between 1950 and 1980, they are adapted from an earlier linear view of adult life in which the principle aim of adults was said to consist of the ability to love and work, a concept referred to by Jung (1970) as 'individuation'. Whilst the mid-life crisis theory still holds cultural support, a more cyclical view of adult life prevails today. According to Hudson, these cycles portray adults as human beings who go through stable and unstable times and have the capacity to manage both (1999: 38).

It is commonly understood by adult educators that the aim of adult education is to promote self-directed learning and, therefore, equip adults better for recognizing that they are agents in their own lives and futures. According to Mezirow (1981), enhancing the learner's ability for self-direction in learning represents the mode of learning characteristic of adulthood. If we accept this premise then we accept that a sense of 'self' is primary to the concept of self-direction, whilst the development of agency requires that a person has both knowledge of 'self' and has reflected on how that 'self' has been formed. Both identity and agency are seen as factors of importance in adult change and learning within settings such as the home/outside world transition (Graber *et al.* 1996), optimizing potential/managing obstacles (Carstensen *et al.* 1995) and in welfare to work studies (Riemer 1997).

Fundamental to the concept of self is also the concept of 'other' and our relationship with those with whom we interact. It is often within this interaction that learning occurs. This is the basis for our early learning within the family, and in the teacher/learner relationship of childhood, with the resultant outcomes of positive or negative learning experiences for the child. In early life, we may have heroes and

heroines, then role models and, if fortunate, we find mentors. Relationships with mythical figures take place in the realm of imagination whilst relationships with role models may also occur 'in dreams', but both can affect our developing self-image. However, relationships that take place with mentors demand an act of relating, a one-to-one alliance. Such alliances can have a sustained and lasting effect on our learning (Torrance 1984, 2002) and may be transformative and profound (Bennetts 1994, 1998).

Within the literature, there appears to be almost universal acceptance that the mentor relationship improves self-esteem for the learner. By contrast, the literature on self-actualization as a by-product of self-esteem gained from the mentor relationship is almost non-existent. As long ago as 1976, Levinson suggested that one role of the mentor was to support and facilitate 'the Dream', but Weber (1980: 20) enlarges on this by discussing the shaping and actualization of the learner's 'dream':

Mentoring is challenging and rewarding, but also exhausting and time-consuming. Among its many rewards, the most satisfying are two fold: to participate in another's growth—the creation and actualisation of his potential—and to witness one's own growth through helping another. (1980: 24)

Weber notes that neither mentor nor protégé necessarily talk about 'dreams', but about hopes, objectives, plans, events and actions, which are 'the stuff of dreams' (Weber 1980: 20). Whilst such support seems to be as important as ever, ultimately much is up to individuals and their ability to seize the day and create new ways of being. However, whether transformative learning is approached as a consciously rational process, or through a more intuitive process, those seeking to foster a conducive learning environment must consider the roles of those involved as well as the role of the rational and affective (Imel 1998). In bringing the range of adult roles and relationships to the fore in terms of identity, Hughes and Graham (1990) state:

most adults assume multiple life roles, the most common ones being a relationship with self, a relationship with work, a relationship with others, and a relationship with family. (1990: 3)

They cite Knox (1977) as observing that there are triggering events that cause adults to change existing roles or engage in new ones, and that these events motivate a person to change, adopt a new lifestyle, seek additional training or education and accommodate new life roles. These triggering events are named as: transferring to a new job; divorce; birth of a child; retirement; discovering new talents or interests; children leaving home; and disability.

A relational component to identity (self in relation to others) has been suggested (Forrest and Mikolaitis 1986) with women projecting a 'connected self' of responsiveness and empathy and men projecting a 'separate and objective self' underpinned by reciprocity. In terms of self-actualization, however, they note that:

vocational theory assumes that a *career* is the vehicle for a realisation of self. A corollary, made explicit in Psathas' (1968) vocational theory for women is that family or relational roles act as constraints to self-realisation through occupations. (1986: 86, emphasis added)

However, career advancement in the view of Grossman and Blitzer (1992) is less to do with gender and more reliant on networking and agency. They suggest:

Career advancement comes to those who consciously assess their direction, answer questions about what they want, and then set out to achieve specific objectives that move them closer to their goals. They work to maintain networks, search out information, and create work relationships that will help them achieve career priorities. (Grossman and Blitzer 1992: 68)

Counselling is one relationship often necessary at times of change and, instead of merely helping adults to adapt to external pressures, should help adults to utilize their attributes to achieve self-determined objectives and influence the nature of future choices (Lasuita 1987).

Through counselling, many people who view themselves as pawns, powerless to utilise alternatives, may be able to perceive themselves instead, as agents, having an impact on, and reacting to, their vocational experiences. (Lasuita 1987: 31)

Counselling and mentoring are often sought out when seemingly disparate long-standing factors come together to form what has been called the 'crystallization of discontent' (Baumeister 1994). New connections and associations are discerned by individuals and these connections seemingly provide 'an impetus to initiate a major change' (1994: 294), sometimes preceded by a focal incident. However, change may also depend on personal timing and change readiness or 'teachable moments' (Havighurst 1992)

In order to be 'change ready', individuals need to have some hope for the future; some dream that they can aspire to in order to go through the difficult process of changing their circumstances (Egan 1990). However, a personality study of 398 adults indicated that older adults had slightly lower ideals than others (Fleeson and Heckhausen 1997). Clearly, then, one issue for those mentoring or counselling in adult settings must be the need to 'catch the echoes of hope, and offer them back' (Egan 1992) to the individual.

Change is often incremental, with adults moving gradually towards their goals thus achieving success and gaining confidence in making small changes before getting involved in larger life changes (Grossman and Blitzer 1992). This view supports the theory that adults are no longer experiencing life as a linear upwardly progressing process, but as a more cyclical course marked by series of transitions. The cyclical perspective is useful as it promotes the view of self-renewal as a continuum, with adults trained to anticipate and facilitate transitions. Such a view would encompass the concept of self-directed learners and would encourage the vision of learning as a lifelong possibility. If adult behaviour is determined by transition and not age and adult readiness depends upon situation, support, self and strategies (Sargent and Schlossberg 1988), then it is clear that adults will need the skills to adapt and change continually.

To what extent the Fellowship Scheme offers opportunities to practice and develop such skills within a supportive environment aimed at transformation was an unknown but exciting question. What part did the FS play in the crystallization of hope; and given that the FS aims to enable change for the good of both the individual and the community, how is this made visible within the community? How

are these changes sustained and how do they evolve within a constantly changing environment? More than 950 Fellows had passed through the FS over a period of ten years. Such a large pool of Fellows was rich ground for addressing learning and change in the lives of adults within the two rural and maritime regions of Devon and Cornwall.

Methodology

Overall, this inquiry holds the perspective of the qualitative interpretive researcher and accepts that social reality is viewed in multiple and diverse ways by individuals and that no single 'truth' is privileged. Therefore, whilst some numerical measurements are included, no statistical significance is claimed. A questionnaire approach, although limited in some aspects, was deemed most appropriate and cost-effective for what was essentially a pilot study from which a longitudinal study might evolve.

Apart from the initial closed questions to ascertain demographic data, all other questions were open to invite participants to give full responses. The questions were formulated both from concepts derived from the review of literature on adult transitions and from issues of concern to the SCT. A large space was left at the end of the questionnaire for any information that Fellows deemed critical to their experiences. The questionnaire was piloted and all Fellows (955) were mailed. An annotated version of the questionnaire (with spaces removed and a rationale provided for each question), can be found in the appendix.

Some Fellows could not be traced—although 197 responded, approximately 20% of the target group. An explanatory letter had accompanied the questionnaire asking Fellows to read the questionnaire a day or two prior to completing it, to allow time for retrospection, as some had received Grants up to ten years ago. The material was analysed manually with answers to questions analysed in parallel. Initial categories were formed and refined by repeated comparison, along with the themes that permeated the stories of participants. All categories are grounded in participants' own words and were not pre-determined by the researcher.

Many Fellows wrote their stories in a 'stream of consciousness' biographical mode, ignoring the boxes. This suggests that the request to reflect on the questions prior to answering allowed participants complete freedom to speak and alleviated to some extent my concern that a questionnaire might inhibit data collection rather than encourage it. All participants were coded and pseudonyms were used in case studies. The coding system used throughout is as follows:

c = Cornwall respondent	= female
d = Devon respondent	= male

Numbers indicate both the order that responses were received and the year that Fellowship began, for example, dm 12 97 = a male from Devon who was the twelfth man to return a questionnaire for the year 1997.

Presentation of the findings

Space does not permit the complete report (Bennetts 2003) to be presented in one article and the purpose of this paper is to address transformational learning only.

This paper focuses on how Fellows evaluated transformational learning, the factors they named as most influential in those transformations and the impact of transformations within their lives. The findings are presented initially in terms of demographic data and quantitative analysis. Then Fellows' quotations are used to enable readers to get a deeper sense of their experiences and provide a forum for Fellows to speak for themselves. This is in keeping with the philosophy of the SCT and the researcher, that given the opportunity adults are able to voice their own learning. This is followed by the themes that arose from the study, and a summary and discussion of the findings.

Demographic data

Of the total of 197 responses, 15 men and 60 women were from Cornwall, and 34 men and 88 women were from Devon. This pattern of response imitates the pattern of application as three times more women than men apply each year. However, as respondents selected themselves there is a possibility that those with less positive learning experiences may have chosen not to respond.

Occupations at time of application

The following categories were derived from the data provided by participants, and not from any pre-formed list. Within the questionnaire, the words 'meaningful activity' were used rather than 'job' to encourage all occupations to be listed, not just those that were waged. Many participants reported that they had more than one occupation, and it was not unusual to find that some were looking after a family, doing voluntary work, and studying as a student all at the same time. Although the majority of family carers were women, some men reported that they were acting as single parents and coping with the demands of children and home. The occupations given were:

- looking after family (95);
- part-time paid employment (63);
- student (41);
- voluntary work (34);
- full-time paid employment (31);
- self-employed (21);
- unwaged (15);
- benefit (ill health) (6); and
- retired (2).

Precipitating concerns in applying for a grant

These categories were also derived from participants' own words and once again many participants listed more than one concern. The concerns given were:

- desire to fulfil potential/improve career prospects (154);
- needed money to live (81);
- desire to do something to benefit others (42);

- post breakdown in physical or mental health (24);
- returning to work after relationship split (22);
- desired change (21);
- returning to work after children (16);
- response to enforced change (14);
- redundancy (5); and
- boredom (3).

Despite the high percentage of unemployment in the South West, few applicants were in receipt of state benefits and most expressed a keen desire to make some positive career change and achieve their potential. Some of the events that precipitate and motivate the need for change support those in Knox's (1977) study. These are disability, retirement, children leaving home and divorce. However, Fellows in this study also mentioned the desire to achieve their potential, the desire to improve their career prospects, the need for money to live, the desire to do something to benefit others, a response to enforced change, boredom, a wish for change and redundancy.

Amount awarded

Information on the amount of Grant awarded was provided by 191 applicants. Six Fellows could not recall the amount and as they had also given no names were unable to be traced through the SCT records.

Women

- Under £300 (69);
- Under £600 (58);
- Under £1000 (13);
- Under £1500 (4); and
- Over £1500 (1).

Men

- Under £300 (22);
- Under £600 (14);
- Under £1000 (5);
- Under £1500 (4); and
- Over £1500 (1).

It can be seen that the majority of grants are for relatively small amounts of under £300, and that these are relatively evenly distributed between men and women, taking into account that many more women apply each year than men. Grants over £1500 are rare.

How the grants were used

Most respondents (171) were applying for money to attend formal courses with only 22 initiating self-directed studies and only four having visionary status. Visionary status is defined here as those who had ambitions to create something new within their community. The majority of courses applied for were in health and

social care issues with a preponderance of applicants for counseling courses. There were also some returning to teaching or aiming to become teachers in mainstream education, a few learning to use sign language for work with the deaf and some alternative therapists. Some courses were in horticulture, and the few self-directed studies include the arts, photography, film, story telling and writing.

Changes since the grant

The changes reported since receiving an FS grant fell under the headings of

Academic, personal and career. Included within the academic category are college-based training courses for vocations as well as higher degree courses at universities. It should be noted here that, at the time of responding, some Fellows from 2000 onwards were still in the process of their education or chosen path of change. All but nine Fellows reported changes in their lives since receiving a grant. Of the 188 who responded to this question, 135 had gained academic qualifications, 134 reported personal change and 115 had either gained employment after gaining their qualifications or had a job change.

Transformational change. Whilst it was anticipated that most Fellows would be able to report on the effect of their personal changes, it was expected that fewer would consider their changes to be significantly life transforming. However, significant transformations were noted by 156 Fellows and their responses formed six categories:

- (1) self-transformation (102);
- (2) coping with/instigating change in self and others (58);
- (3) transformed relationships (54);
- (4) increased educational drive (52);
- (5) career improvement (44); and
- (6) quality of life (32).

(1) *Self-transformation:* Transformations appear to be learning events that have had a deep impact on Fellows' beliefs, attitudes, behaviours and personae. Significant learning in the case of this woman is becoming a reality as she applies it to her role as a parent.

I was incredibly inspired by the course I did. It led me to consider deeply, the way we raise our children in our culture. I believe that the careful well thought out nurturing of our children will have a direct—hopefully positive—effect on the whole community in the future. I am putting a lot of what I learnt into practice as a mother. (df 3 97)

Nine years on, this man's new found confidence has enabled him to see himself and others in a more level light: 'I feel much more confident when talking to people especially people who previously I might have thought to be of a higher educational standard' (cm 1 93). Others feel that action toward achieving their potential has also changed their health:

I feel fulfilled and this has contributed to my improved health. Without the life change I do believe I would not have recovered from cancer—my surgeon also believes this. Fulfillment in knowing I'm doing what I should be doing. (cf 4 96)

Growth and movement were phrases repeated often and this Fellow describes her metamorphosis:

I have grown enormously. Become aware of my strengths and talents and have the training to use them. I feel that my life is unfolding, going places instead of the old experience of fear and stasis and worthlessness. (cf 2 95)

Education seems also to have been a way of achieving autonomy for some participants. One woman in her late forties said:

The Fellowship and subsequent study have given me the means to be an independent woman. I am now on my own with my children and am so relieved that I studied when I did and have been fortunate enough to achieve what I wanted to. (df 1 92)

One man describes how his confidence received a boost when he was offered the Grant.

The Grant came at a time when my life was at a low ebb both financially and emotionally. As well as allowing me to continue with my training, I felt more confident about dealing with a very difficult family crisis which had occurred in my wife's family. (cm 2 94)

(2) *Coping with or instigating change in self and others:* Learning to change requires developing new perspectives and one participant describes how she is using her new skills to enable others to escape their perceived limitations and instigate their own changes.

I am more confident and assertive, more committed to helping others change and enrich their lives, to be as fulfilled as possible. More able to support my children especially in terms of improving their communication skills and self-advocacy skills. With regard to friends—relationships that have survived (some didn't!) have deepened, I tend not to encourage superficiality in friendships. I know I have helped people along—encouraging them to fulfil their potential, especially single parents and people recovering from addiction abuse, and other traumas. I think the greatest changes—and those that I work towards most actively—are helping people change unhelpful mindsets and ways of behaving—freeing them from limitations that have dominated their lives. (df 9 97)

One woman says that because she is now 'better qualified' she is able to have 'greater opportunities to explore with others and alter their lives significantly' (df 15 99) and another says that she now has 'the ability to accept that change is needed in life—we all need stimulation' (df 4 99). Others relate how they are now

more willing to accept change in their lives simply because they were encouraged by the FS: 'I was positively motivated because of the Grant inasmuch as I was inspired because someone believed in me' (cf 5 01).

(3) *Transformed relationships*: Transformations within families were reported by many Fellows: 'it rounded off my education in an holistic sense. I believe I am a better mother' (df 7 97). The following quote illuminates the significance for everyone, in the breaking of old patterns.

It was the starting point for me to realize my potential in society and within my family unit. I am now employed, my children are finishing their education and gaining GCSEs at good grades. There the significance is not only for me, but my children as well. It has broken the cycle of deprivation. (cf 5 95)

This family was also motivated to work together:

I am now able to work on my art all my free time, as I have my equipment permanently set up. My son has offered to market my pictures and this has been a very positive family experience. (cf 9 00)

One man described his significant change as the way in which he now relates his work to the countryside seasons, working in harmony with the community:

Involvement with local people concerned with the countryside, and the ability to tailor my job to the benefit of the countryside and wildlife e.g. not hedge-cutting at nesting time. (dm 4 97)

(4) *Increased educational drive*: Many Fellows reported that their significant change took the form of an increased drive to continue their learning and education.

The need to learn has become my great *itch* of life and without the help of the Fellowship I would never have been able to reach any of my goals, and the young people I have met and helped have been a rewarding experience. (df 2 98)

I have not stopped learning since the course that the FS helped to partially fund. That experience gave me a good foundation to begin learning again at a higher level. Since then the learning experience has not been so daunting. (dm 1 93)

Others evidenced their commitment to continued learning by naming the courses they had since taken, and sending detailed CVs along with their questionnaires.

(5) *Career improvement*: For a number of participants, the most significant change is that they now have paid employment. One woman who received her small grant of under £300 ten years ago, remarked that she has had the confidence 'to create one of the largest natural health practices in the South West' (cf 1 92). Another woman, whose horizons have broadened since her application nine years ago, says of her changed career:

Myself, more confident and adventurous, able to think about the wider world as well as my family, and now act on the thinking. I now co-ordinate the

counselling services at NCH Family Centre and at Victim Support, I work at Marriage Care and I am tutor of counselling at a College. (df 1 93)

Fellows reported a wide range of transformational career changes and the overlap between confidence and career surfaced time and again within Fellows' stories.

Most definitely confidence. I always felt inferior because I am a cockney. But as soon as I got qualified I felt professional and now work alongside consultants, psychiatrists and a mental health team. (cf 2 96)

A former social worker who had left her job because of serious stress reported that:

My life has been completely turned around, moved in a different direction from working in social services, retiring and not employed, re-training and then employment. (cf 7 01)

(6) *Improved quality of life*: Some participants reported that the quality of their lives and, in some cases, their families' lives had changed since their grant: 'My quality of life has improved and I'm a better, more balanced, happier person' (df 4 98); 'Able to give my family a better quality of life' (df 7 99). It is never too late to improve on the quality of our existence and, for some, this comes about in terms of what we can offer others, as this woman in her late sixties remarked:

Completing the Diploma course would not have been possible with this help. As a result of this, I can now work with women in counselling, focusing on empowerment and health. It gives meaning and purpose to retirement. (df 7 00)

Issues involved in the changes. Toward the end of the questionnaire, Fellows who had undergone transformations were asked what they thought had led them to experience such significant change. This was in order to get a picture of all the issues that helped Fellows, and not assume that these transformations were the result of the Fellowship alone. Fellows' responses (127) fell into six categories:

- (1) Self and identity (78);
- (2) FS Grant/support (49);
- (3) Educational experience (48);
- (4) Family relationships/other (18);
- (5) Holistic (15); and
- (6) Religious belief (3).

Again, responses sometimes fitted more than one category.

(1) *Self and identity*: The majority of Fellows named themselves as the one who had made things happen; however, many participants thought that the transformation had come about because they had been validated as individuals of worth by the SCT.

Being belived in. Someone having faith in me. (df 2 95)

What is mostly responsible is regaining my identity initially, as an adult and an individual, which in turn led to my feeling that I am a useful, happier, contributing part of my community and society. (cf 1 93)

Recognition—belief in me by others that enable me to believe in myself. (df 11 97)

An awakening of a sense of responsibility and keen interest in nurturing the future generation. (df 3 97)

(2) *FS Grant*: Not surprisingly many Fellows named the SCT as the initial factor in their change process.

The Grant was very important as I had a fund to draw on for art materials. However the whole experience was like taking hold of a helping hand and being supported whilst finding a new way forward. My self-esteem was boosted. (cm 2 94)

At that time I was struggling to gain a footing in a new endeavour. Although the Grant was small, it enabled me practically but also gave me a boost and helped me develop self-belief. (dm 2 97)

I feel so much more confident, which I think came directly from knowing that someone outside of my life was prepared to ‘put their money on me’! I felt a real sense of obligation in response to that, and now feel a strong pride in my achievement. (cf 4 92)

(3) *Educational experience*: Fellows also named their educational experience as the important factor in their transformations either in terms of the content of what they learned, or the process of re-entering the formal educational arena and having their awareness raised.

The course has re-affirmed certain beliefs in terms of cultural forms and their interaction with everyday life. Culture is important, and it can have positive benefits, not only in what is produced, but more so in terms of the process of bringing people together. I think I have felt more included in society because of that assurance. (dm 5 01)

Re-entering education and extending horizons enabled me to start questioning the status quo. (df 5 93)

(4) *Family and other relationships*: Some Fellows paid tribute to their families, or others, as being most responsible for transformations:

‘The support of my family. (cf 2 99)

Increase in esteem that has stemmed from the enthusiastic and positive reaction of our audiences and the people who joined us in our projects. (dm 2 99)

Those who had gone through the process of learning to counsel, where personal change is built into the training, were able to offer deeper insights into how interactions with counsellors can effect change.

Because the course brought up a lot of childhood insecurities and memories which I was unaware of and had blocked, the counselling I had allowed me to work through these issues enabling me to understand, listen and be more aware of myself and others situations and circumstances. It allowed me to accept in every way. It allowed me to be on the most important journey of all; the inner journey, understand myself. (df 10 00)

(5) *Holistic*: Not all participants who responded to the question were able to isolate individual factors but said that their transformations were holistic and that no single factor stood alone.

I see events in my life as a 'process', which is moving forward rather than backwards; and it is difficult to pin-point any particular circumstance; rather a combination of circumstances and people and happenings. (df2 93)

The FS was a small but important cog in a chain of events that helped to sustain my education. (dm 6 97)

One Fellow seemed to sum up the words of the many when she said:

Having a dream to change, pulling that dream into action and finding the support network to facilitate the process, including the Fellowship. (df 6 97)

(6) *Religious belief*: A few Fellows named their religious beliefs and practices as corner stones of their transformations: 'God! I am sure he has used the generosity of the Trust to further my career' (dm 1 93); 'Listening to the inner voice/God, and actually doing something about it' (df 12 99).

The effect of grants

The effect of Grants on Fellows hopes, plans and ways of living came under four headings.

- (1) realisation and action (44);
- (2) foundations for life/career (66);
- (3) contributing to society (62); and
- (4) lifelong learning (38).

In all, 168 Fellows responded to this question and, once more, participants responses often fitted in more than one category.

Realization and action. The word 'realization' refers to the general raised awareness of Fellows in relation to living in a world of change, and that they have some power

within that world to effect their own changes. Fellows made reference to a new way of looking at life which was often intuitive and action led:

I'm living my hopes and plans now. (df 12 99)

Feel that if I want to make changes I can, and that I can ask for and find, support. Am willing to look at other ways to run my life if I am not satisfied with how things are going. Although fragile, I find that I can trust the process of change more than before, despite the fear sometimes seeming greater! (df 1 94)

It's about daring to follow your heart, your dreams . . . it helped me reach for the stars and I'm very grateful. (df 2 95)

Foundation for life/career. Many participants described how they attempt to use their awareness and new learning into their everyday life, work and philosophy:

I have been able to fulfil a small ambition to work again. (dm 1 00)

. . . there isn't a part of me or my life that hasn't been touched by this experience. It certainly helped me recently in dealing with the death of my mother.

On a day-to-day basis, it makes me realize what is really important and that where I am is less significant than how I experience myself and others. On a professional basis, my students benefit from my experience, I pass on learning and information freely and greatly enjoy their responses.

In terms of being a parent, it helps me survive my daughters' teenage years positively. I would go so far as to say I couldn't have been there for her if I hadn't embarked on this journey. (df 9 97)

Contributing to society. Quite a few participants made remarks about how their awareness has affected their relationship with society in terms of how they act and think:

By taking a bicycle to work and thus reducing/eliminating CO2 emissions. Lots of small things that are brought about by awareness. (dm 4 97)

I realized that I am a member of society in which we all have to give and take. . . . I therefore see the importance of a collaborative society whereby people work out of love. It would seem there is an abundance for everyone if we learn to live right. Call it citizenship if you will, knowing one's limits/responsibilities. (dm 4 01)

Lifelong learning. This heading is used as a category for those Fellows who discuss both their awareness of formal learning enmeshed within their day to day lives, and the 'spin-offs' from this.

The Access course was the beginning of 7 years of study to achieve my ambition. I now understand the concept of lifelong learning and pass this on to people of all abilities, ages and gender. I hope to obtain a Master's degree sometime in the future. (df 2 92)

I have a strong belief that learning is a lifelong challenge, and am more open to taking up new learning opportunities. (df 4 95)

And another seems surprised by her new way of thinking and behaving:

Even at my age I still have many future plans. Before beginning the O.U. I never looked ahead. I try various courses in subjects I would never have tried before. (cf 1 94)

One man, whose plans didn't work out the way he wanted, eventually found his direction from taking a new route:

Although I did not qualify as a podiatrist, the whole experience was of great value and served to direct me to other areas of study and interest. I obtained a teaching qualification and am now completing an assessors award to enable me to work for the Government NVQ system and teach horticulture to young people. So there was a positive outcome to my efforts eventually, though not the way I planned in the beginning. (dm 1 99)

Finally, the words of one participant whose studies have had some family reverberations:

Was waiting for French Level III to appear on OU lists of courses, but may now look at what I might do with music to complete my degree. My son has a mum sitting GCSE and AS levels at the same time as him. My younger son seems to have focused better at school in the last 18 months, maybe as a result of seeing our determination. (cf2 94)

Themes arising from the inquiry

Throughout the analysis, the themes that appeared persistent were those of faith and agency, hope and helplessness, and trust and accountability.

Faith and agency

Fellows repeatedly mentioned the faith that the SCT had placed in them, how this had helped them feel that their dreams were sound and that they were individuals with ambitions worthy of investment. They remarked how this feeling had given them self-belief and helped them to move forward with their plans. In effect, they began to exercise some control over their circumstances. This sense of newfound agency appeared to allow a power-shift within a changing environment, which was coupled by a sense of responsibility for self and community, and eventually an increased sense of citizenship:

I can really only reiterate the importance of (the Administrator's) initial gesture of faith and confidence in supporting my application for a grant. It was certainly instrumental in my estimation of self-worth, and thus, indirectly or otherwise, in the achievements which followed. (df 5 97)

I've become more confident in my own abilities and more motivated to grow as a person. Because the FS has indirectly demonstrated their faith in my abilities (by providing the course fees), I've worked hard and made the most of other opportunities I perceive. (cf 4 01)

The concept of identity, which appeared ill-formed at the time of application, became much clearer as Fellows began to act on their own behalf and, by the time that dreams and plans were realized, appeared more defined and autonomous within interdependent relationships.

Hope and helplessness

Many participants were in desperate financial straits when applying for grants. For some, the SCT was a last hope in a series of disappointments and refusals. The ability to continue hoping appeared to sustain Fellows throughout their changes and to cope with problems as they arose. This seemed to encourage action over helplessness and small triumphs over despair and was supported by the mentoring received from the Administrator. The issue of mentoring and other supportive relationships in transformational learning will be addressed in a separate article.

Hope offers a promise of something better around the corner and gives meaning to the struggle to go on. The search for meaning is a primary motivation in life and once life becomes meaningful it not only renders happiness, but bestows the capacity to cope with suffering or strife (Frankl 1959: 63). As Fellows' movement toward possibilities turned into actualized realities, the hope did not fade, but appeared strengthened and focused. Even those who had not yet achieved their aims were still clutching on to hope: '... I had to put aside all my plans, but not my hopes. I still hope, despite my age' (cf 3 92); 'Sometimes I wish I hadn't started, but I have a determination and stamina that is going to carry me through' (cf 1 00).

Earlier within this paper I queried what part the SCT might play in the crystallization of hope. From Fellows' reports, it appears that the SCT acts as a catalyst for hope by offering the opportunity of new possibilities and new horizons.

Trust and accountability

It was clear from Fellows' comments that they felt trusted and worthy of investment by the SCT Trustees. Apart from Fellows acknowledging receipt of grants, there is no other procedure for tracking how finances are used. This approach proved puzzling for only one Fellow who said:

I was surprised by the lack of accountability regarding the use the grant was put to. There seemed to be no monitoring that the money was not spent on other things! (dm 1 94)

That this remark should have come from someone who works within the caring professions is not surprising, as these days such professions are high on accountability whilst appearing low on trust. Such a stance is evidence of a '*culture of suspicion*' (O'Neill 2002a). O'Neill considers that:

Those who are called to account should give an account of what they have done and of their successes and failures, to others who have sufficient time and experience to assess the evidence and report on it. Real accountability provides substantive and knowledgeable independent judgement of an institution's or professional's work. (O'Neill 2002b)

This independent study indicates that Fellows have demonstrated a clear commitment to not only honouring their commitment to their goals, but also delivering over and above their original intentions in forms that are visible within the community by actions and behaviours. Those who have been given grants have provided clear evidence and examples of what they have achieved and the value of the grant in their lives. The SCT is an example of a high trust organization. Fellows note that the trust placed in them has a validating effect on their self-image. They note that the faith placed in them to use the grant appropriately enables them to take steps to achieve their dreams. Although the financial investment is important, it is not this alone that enables Fellows to initiate change, but the trust and belief of the SCT that they are individuals of worth.

Discussion

Hudson (1999) notes that adult learning takes two forms: developmental and transformational. Developmental learning focuses on human effectiveness in personal life and career. Transformational learning, however, aims at evoking a new consciousness and self-understanding, and promotes the human experience by thinking, self-expression and actions (1999: 246). This study supports this view to some extent whilst allowing Fellows to evaluate for themselves what is deemed transformational. The elements that Mezirow (1981: 7) considers present in perspective transformation are:

- (1) a disorienting dilemma;
- (2) self-examination;
- (3) critical assessment of role assumptions/sense of alienation from social expectations;
- (4) recognizing that others share similar experiences;
- (5) exploring options for action;
- (6) building competence and self-confidence in new roles;
- (7) planning a course of action;
- (8) acquiring knowledge and skills for implementing plans;
- (9) provisional attempts at trying new roles; and
- (10) reintegration into society based on new perspective.

To what extent this limited inquiry into adult change reflects Mezirow's ten elements will be addressed within the wider discussion of findings.

Most Fellows who responded were aged 40–49, the years most commonly acknowledged for the development of mid-life transitions (Levinson *et al.* 1978, Levinson 1996, Sheehy 1996), and most Fellows were still within their working years.

It is clear that Fellows were not only responding and reacting to events imposed upon them but were pro-actively seeking new patterns of life. Bauemeister's (1994) '*crystallization of discontent*' clearly occurs for Fellows and Mezirow's (1981) '*disorienting dilemma*' (element 1) was also present, but was sometimes more of 'slow burn' than a critical incident. However, Fellows' readiness to accept change depended on contextually appropriate and timely opportunities, which allowed for the possibilities of hope and the formulation of dreams. According to Taylor (1997: 46), context 'reflects the personal and sociocultural factors that play an influencing role in the process of transformative learning'. The FS provided the trigger of hope and the opportunity for those changes to begin. All but one Fellow (196) reported that they were 'change ready'.

Those who had experience of managing change earlier in life were able to reflect on how they had coped and drew upon that to assist their changing circumstances. However, self-examination and critical assessment (elements 2 and 3) appeared after each small aim toward the bigger goal had been met, rather than prior to applying to the SCT. Whilst the value of shared resources and experiences with others (element 4) was evidenced in the main study (Bennetts 2003) as helpful in contributing to the overall learning process, it was not mentioned as a factor when Fellows evaluated transformational change. Exploring options for action (element 5) took place mainly with the SCT mentor, or other mentor relationships more close to home, and was in the main an initial step that occurred prior to an application being made.

Planning a course of action (element 7) also occurred, but for most this happened very early in their change process, and preceded building competence and confidence in new roles (element 6). Taylor (1997: 44), however, quotes Mezirow as concluding that the 10 stages are not always sequential. Acquiring knowledge and skills for implementing plans (element 8) and provisional attempts at trying new roles (element 9) did occur. And although Fellows had never left their local settings, they did reintegrate into society (element 10) in new roles. However, although it can be said that this study supports Mezirow's theory—in a broad sense—in that the ten elements were present to varying degrees—it is not the whole story. Fellows' portrayed a series of emotional and financial highs and lows aided by supportive relationships, hard work, determination and risk-taking, coupled with an instinctive knowledge that they were on the right path.

Fellows evaluated transformational learning by the extent of major changes in thinking, feeling, acting, relating and being. Such changes led to an improved quality of life and a change in values, both for Fellows and their families. However, the changes were not just limited to ways of thinking and viewing the world, but were concerned with action. For some, these changes had a direct effect on the community in which Fellows live. At the time of application to the SCT, 34 of the 197 Fellows were involved in some kind of community service, but today 119 Fellows are working with their communities either in developing new projects or helping with existing schemes.

This study encompasses and supports Mezirow's elements of perspective transformation, and those transformations became meaningful for Fellows by

direct action within their own lives and within communities. These actions were often driven by intuition, strong emotions, dreams and hope, elements in-keeping with Mezirow's (1991:24) 'feelings, intuition, dreams and physiological states' regarding knowing, and with Boyd and Myers, (1988) view of transformative education. They say:

... transformative education calls to public expression those fears and terrors as well as those hopes and yearnings regarding growth and change that have been denied for so long and suppressed so deeply. (1988: 276)

Taylor (1998: 41) notes that although rationality seems to be significant in transformative learning, it is possibly of no more significance than emotion.

The process of change in the lives of adults has many implications. Families still have to be cared for and fed, houses still have to be cleaned, bills and mortgages paid, and partners and children have to accept that they will need to alter their existing patterns of day-to-day living. In the very early stages of change, roles and relationships have to be negotiated. These can be unsettling times for a family, and no one within the immediate and extended family unit is immune to the effects of an individual's decision. Learning is not taking place in isolation from the family; the whole family is learning whether they choose to or not. They are learning to cope with new situations and are finding new strategies for getting by. Learning is a family affair and, in this context, appears to function as a core around which life, relationships and roles are wrapped.

Interestingly, despite both sexes openly acknowledging the support of families in their transitions, only women reported families as instrumental to those changes, whilst men quoted others. To some extent this supports Forrest and Mikolaitis' (1986) theory that women view their identity in terms of their connection and responsiveness to others, whilst men see themselves as essentially 'separate'—experiencing relationships in terms of reciprocity between individuals. This finding warrants further exploration and will be addressed within the next phase of the research.

Fellows' search for an identity to prevail beyond other roles and relationships appeared to be met by the lengthy process of change, resulting in a more definable self-image, a sense of place within a community, and a desire to help others. Self-reliance gradually developed within inter-dependent relationships of friends, family and community. This too will be addressed within the next research phase.

The FS offers an open field for developing the skills and thought patterns necessary to keep transitions on track, and for adapting to change. Hardly surprising then that many Fellows now attest to helping others work with transition. The process of change is incremental, with small achievements preceding bigger steps. What remains constant is the continual movement toward something. Even those who have had to postpone their plans still move toward getting the conditions for change in place in their lives, whilst continuing to cherish aspirations and ambitions. Contrary to Liat's (2000) study, women over the age of 50 in this study did not experience a decline in health as their income increased but rather enjoyed a better quality of life.

As noted earlier in this article, individuals frequently chose to record their responses in a biographical style as they told their stories of transition. Change

became meaningful as Fellows recalled the learning that had taken place since they received grants, and links were made between past and present situations. According to Hake (1999), this biographical skill is perhaps 'the *key* competency which can enable individuals to cope with the risks associated with transitions and critical life events, ensuring individual survival in late modernity' (1999: 86, original emphasis). It might be assumed that as many Fellows had applied for health and social care courses, they had taken a particular stance to personal learning and change, and were somehow different from those who applied to do other things. However, although the findings do not support this assumption, it must be said that those who had applied for counselling courses were able to refer to humanistic theory and were very articulate in their responses. I have noted elsewhere that counselling students are rich sources of data for those interested in lifelong learning from the holistic perspective of achieving full development of the personality (Bennetts 2002)

The transitions reported by Fellows are evidenced by their visibility within their lives and in the community. Fellows can be seen to have changed. They have different jobs, new friends, happier relationships, and more fulfilling lives. Their early dreams are now concrete realities, and many Fellows are presently working toward new ambitions within their supportive networks. These transitions appear to have been sustained over the years by the knowledge that change for that individual is possible, necessary and rewarding. The transitions evolved through a cycle of evaluation of circumstances, assessment of learning need and adaptation of present pattern of life required to achieve the new goal. In this context, lifelong learning becomes the norm, life itself; a process, not a discrete educational event. Sustainability here is about the continued ability to learn from change and does not denote a static state. When Michael Young (1982) referred to the Elmhirst's view that 'education be conceived of as life, and not merely a preparation for life', he came fairly close to predicting one of the outcomes of this study.

The SCT is unique in offering adults in Devon and Cornwall financial aid to effect change in their lives. It is evident from present respondents that recipients of FS grants have made major changes within their lives and valuable contributions to their communities from the 'seed corn' of quite small sums of money. It is equally evident that participants in the Fellowship Scheme are individuals who fall outside the criteria of other grant schemes and without such help may well have remained victims of their circumstances. The question for the SCT is now 'To what extent can the findings from 20% of past Fellows be transferred into helping all future Fellows to have positive learning experiences?' Plans are underway to meet this aim by means of offering locality mentoring and support from past Fellows to relieve the present mentoring load of the SCT Administrator. As mentioned earlier, a limitation of this present study is that as respondents were self-selected, there is the risk that Fellows with less positive experiences have chosen not to respond. This methodological weakness will be overcome in future by tracking a complete year group through their period of Fellowship over a number of years.

Further research questions will address how transformational learning in the FS can be further facilitated; the role of intuition, hope and emotion in sustaining transformations; the value of transformational learning in Fellows' communities; and the role of relationships in Fellows transformations.

Michael Young appears to have left a legacy of considerable value to the people of the South West in the form of the Second Chance Trust. Those who have benefited from this legacy have the potential to act as change agents in their own lives and in the development of the communities in which they live.

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Appendix

Elmgrant fellowship scheme (EFS) questionnaire (annotated version)

Please remember that your identity will be kept anonymous. Please answer the questions as fully as you can.

Full name:

Address:

E-mail address:

Telephone number:

Please circle the appropriate answer to the following five questions:

Gender: Male/Female

Age now:

30–39 40–49 50–59 60–69 70–79 80–89

What year were you accepted on to the Elmgrant Fellowship Scheme?

1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001

In which county did you live at that time?

Cornwall

Devon

How much was your Grant for?

under £300

under £600

under £1000

under £1500

over £1500

Please answer the following questions in your own words and as fully as possible

What sort of work occupied your life at that time? (such as looking after the home and family, paid employment or other meaningful activity)

Aim here is to ascertain what work looks like to the individual, not to force a wage-related perspective

Looking back, what factors were influential in your decision to apply to the EFS for a grant at that time? (such as, a divorce, redundancy, boredom, breakdown, etc.)

Aim here is to look at motivating issues behind the push for change

In terms of personal timing, how ready were you to accept change at that point?

Aim here is to assess 'learning readiness'

What kind of things helped you move forward with your application at that time in your life? (for instance, what did you have to sort out first and how did you go about it?)

Aim here is to address strategies used to enable application to go ahead

What did you want the Grant for?

Aim here is to establish categories of application and subsequent skills and knowledge aim

Once you had applied to the EFS, how long did you have to wait to receive a reply?

Aim here is to see if the applicants get a swift response

A few applicants were invited for interview, were you one of them?

Aim here is to see what percentage of applicants get interviewed

If you were invited to an interview, what was your experience like?

Aim here is to evaluate applicants' experience of the interview to check for approachability and learner-centredness

What help and advice were you offered from the EFS about your plans for the grant?

Aim here is to assess level of help available in deciding what direction to go

If you were offered pre-grant advice, in what way did you then amend your original plans?

Aim here is to assess benefit of such advice

What form of support did the EFS offer *after* you had received your grant?

Aim here is to check what support was on offer, mentoring or otherwise, and if participants took it up

What other people did you draw on for support during your time as a Fellow? (such as friends, partners, professional expertise, other)

Aim here is to see what other supportive relationships were utilized during the change process

What *kind* of support did you find most helpful during this time? Give examples if you can.

Aim here is to elicit concrete examples of support to inform future procedures

What other support would have been helpful to you?

Aim here is to find out if and how things could be improved and what part the EFS might play in this

What changes, no matter how small, have occurred for you since receiving the grant?

Aim here is to address incremental change

In what ways do you think these changes have affected yourself, your circle of friends and the wider community? Give examples if you can.

Aim here is to look at benefit to self, others and community

In what ways if any, has your life has been altered significantly by the Fellowship experience? Give examples if you can.

Aim here is to look for examples of transformational learning

If you *have* experienced a significant change of some kind, what do you think is most responsible for this?

Aim here is to get participants to try and identify and isolate how their changes occurred

In what ways have your future hopes and plans been influenced by your experiences as a Fellow?

Aim here is to address sustainability, and to see what part the DFS played in the 'crystallization of hope'

In what ways, no matter how small, do you now apply your experiences and learning in the various areas of your life?

Aim here is to assess the extent to which the learning can be transferred to other settings

Please add anything that you consider crucial to your life and experience that has occurred as a result of your Fellowship.

Aim here is to elicit significant individual experience

It is hoped that the information from this study might lead to a more in-depth research project starting in 2003/04. If you would be interested in taking part in a future study, please circle the following statement.

Yes I would be willing to take part in further research.

Thank you for taking the time and thought to complete this questionnaire. Please return this form in the pre-paid envelope provided by Monday 20 May 2002 to: Dr Christine Bennetts, SELL, St Lukes Campus, Heavitree Rd, Exeter EX 1 2LU.