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## Transformative educational development scholarship: beginning with ourselves

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Self-study is a process of examining our beliefs and actions and exploring questions of practice that arise in particular contexts; the provisional answers we formulate present implications for practice. If we approach self-study guided by an ethic of authenticity, it can be an effective approach to the scholarship of teaching and learning, and has the potential to counter the performative culture of our institutions and transform higher education. The paper provides an introduction to self-study for educational developers who are interested in this challenging yet rewarding approach to scholarly inquiry. Educational developers are encouraged to use self-study to explore, improve – and perhaps transform – their own practice, and to contribute to the growth of academic development as a field of study and practice.

### **Le *scholarship* du développement pédagogique visant la transformation : débiter avec nous-mêmes**

L'étude de soi (*self-study*) est un processus nous permettant d'examiner nos croyances et nos actions, et d'explorer des questions pratiques qui surviennent dans des contextes particuliers. Les réponses provisoires que nous formulons nous fournissent des pistes pour la pratique. Si nous approchons l'étude de soi en étant guidé par une éthique de l'authenticité, il peut s'agir d'une approche efficace de *scholarship* de l'enseignement et de l'apprentissage, et avoir le potentiel de faire obstacle à la culture de la performance présente dans nos institutions. Cette approche peut même transformer l'enseignement supérieur. Cet article fournit une introduction à la notion d'étude de soi pour les conseillers pédagogiques qui sont intéressés par cette approche de l'enquête académique se voulant à la fois gratifiante mais pleine de défi. Les conseillers pédagogiques sont encouragés à utiliser l'étude de soi pour explorer, améliorer – et peut-être transformer – leur propre pratique, et contribuer à la croissance du développement pédagogique en tant que champ d'étude et de pratique.

**Keywords:** self-study; scholarship of teaching and learning; educational development; transformative learning

Amidst numerous and increasing calls to 'transform' our institutions of higher learning, rethinking and reshaping them so that they better reflect core academic values and goals, this paper focuses on self-study practices in higher education. Most self-studies in these settings are conducted for the purpose of quality assurance and improvement.

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For example, teaching portfolios allow colleagues to assess one another's teaching, while internal academic reviews allow us to assess the quality of a department's academic programming. Self-study can also be used by teachers as a form of practice-based inquiry that explores the connections between their teaching and their students' learning (Loughran, Hamilton, LaBoskey, & Russell, 2004). In this paper I argue that self-study is a worthwhile undertaking for individual educational developers, an approach to scholarship that holds great promise for academic development as a field of study and practice, and for higher education overall. I will begin by reflecting on what we mean by transformation, and will then introduce self-study as a possible route (though fraught with risks) to transformation. I take some time to describe how authentic self-study can help us respond to the performance-oriented institutional environments that characterize contemporary higher education, and then propose a simple framework for successfully conducting authentic self-study scholarship.

### **Transforming higher education**

Transformative learning theory (Mezirow, 1991; Cranton, 2006) offers a lens to examine what is implied by a call to transform higher education. Because educational developers are implicated in efforts to bring about change in higher education, they need to appreciate what kind of change is required. 'Transformation' suggests a dramatic change for the better; transformative learning theory explores how that change comes about. Transformative learning occurs when, through critical questioning of ourselves, our beliefs and our expectations, we experience a deep shift in perspective which leads us to a new way of being in the world. Learning may be a response to disturbing life experiences (a disorienting dilemma serves as a precipitating event, and is followed by gradual or sudden change), or it may be a developmental negotiation of life transitions, in which case there is a sense of being on the edge of, and moving towards, something new (Cranton, 2006). Through transformative learning we reconsider the ways we make sense of the world, and our revised understandings inform subsequent decisions we make and actions we take.

The transformative learning process is often described as cognitive and rational, but it may also incorporate imagination, intuition, affect and soul-work. It is not a solitary exercise; dialogue with others typically plays a vital role in the critical process of reviewing our long-held assumptions. And when individuals who have transformed their perspectives act differently in the world than they did before and share their new perspectives with other people, societal transformation can come about.

Transformation is self-directed and voluntary: although we can facilitate and support transformative processes in others, we cannot transform someone else, only ourselves (Mezirow, 1991). Transformation requires a deep, honest, authentic and open engagement in learning, from all who are involved in the process.

### **Introducing self-study**

A self-study invites us to consider 'who we are' and 'what we do', 'what we know' and 'how we know it' (Samaras & Freese, 2006). Personal subjectivity is both assumed and appreciated, allowing us to uncover our underlying values and the manner in which actions and beliefs intertwine. Thus, a completed self-study is a celebration of the individual or collective that initiated the study, and is validation and

valuation made visible. Self-study typically serves as a starting point for further development, a place from which we can identify what is needed to improve in particular contexts. Self-study may also help us to gain a deeper understanding of what is involved in the transformations we say we desire.

An appreciation for self-study as a tool for transformation comes from those who use it as an approach to scholarship (where understanding is the goal), and do not limit self-study to documentation and quality assurance purposes (where showing evidence of success is the goal). Probably the single most important aspect of an effective self-study is its use of critical reflection. Self-study invites us to engage consciously and intentionally in the self-reflective process that characterizes transformative learning experiences: 'Good work in self-study always leads researchers to reframe practices' (Hamilton & Pinnegar, 1998, p. 242). It is an ideal approach for those who are willing to critically examine their own beliefs and to challenge their existing practices.

Self-study incorporates – yet takes us beyond – reflective practice. Loughran and Northfield (1998) argue that self-study takes the personal processes involved in reflective practice and makes them public, thus leading to another series of processes that need to reside outside of the individual. Reflexivity becomes a tool for connecting self with others, enabling critical discourse among members of a community of practice. The self-study sets the stage for next steps: engaging productively with others, developing shared understandings of educational issues and strategies to address them.

There is no single way of conducting a self-study, no one best method to use. Self-study scholars have been particularly successful at incorporating approaches to understanding that involve different ways of knowing, including cognitive, rational self-reflective processes as well as extra-rational processes relying on imagination, intuition, discernment, soul work and affect (see Mitchell, Weber, & O'Reilly-Scanlon, 2005). Self-studies may be conducted using imagery, metaphor, mapping, art-making, drama and music, role-play, ritual and contemplative practices. Other methods include discussion and group work/dialogue, writing (i.e. memoir, autobiography, fiction, poetry) and using texts.

Self-study is a marvelous way to respond positively to the things that take us by surprise, allowing us to turn disorienting dilemmas of practice into positive prompts for transformative learning. Self-study can also help us to first notice the transitions we are facing (e.g. from a teacher-centred to a more learning-centred approach in the classroom) and then negotiate these transitions in more authentic ways. We begin to recognize when our perspectives are changing and must look for new ways to act/practice.

Self-studies may be conducted by individuals or they may be collaborative ventures (Louie, Drevdahl, Purdy, & Stackman, 2003) wherein a group of individuals as a collective explores areas of practice where they have a shared responsibility. Transformative learning theory's focus on the socially transformative power of an individual's critically reflective learning lends credence to the value and impact of self-studies that are conducted within professional practice communities.

We may initially take on the task of conducting a self-study for very pragmatic and instrumental purposes, willing to engage in some self-analysis in order to highlight for others how we are doing good work, and hoping that the study may contribute to self-improvement and development. Actual outcomes can include professional knowledge creation and an enhanced capacity for professional reasoning, critically reflective

practice and self-directed professional/academic development, as well as transformation of the perspectives that shape our practice.

### *Barriers to self-study in the academy*

My own encounters with self-study (e.g. Wilcox, 1997, 1998) confirm that it can indeed be transformative, yet there are barriers – some more significant than others – to fully realizing its potential for the transformation of individuals and their institutional and disciplinary cultures. One issue that often surfaces and may become problematic when academics engage in self-study is the matter of professional identity. For example, in my own work with new university teachers, I have found that an invitation to explore their emerging teacher-self may well challenge their barely formed identity as disciplinary experts. Transformative approaches to self-study ask participants to rethink academic roles and practices, and not surprisingly, not all beginning academics are ready to consider alternative ways of thinking and doing things when they are not yet secure within their disciplinary communities. The same holds true for educational developers, practitioners in an emerging field without well-defined boundaries that offers little in terms of an assured identity. Thinking critically and deeply about one's approach to practice is not always an inviting process for those lacking security in their role.

The educational developer who wishes to support teachers' self-study scholarship faces another category of risks that can become a barrier to engagement and success. The task of facilitating self-study demands a very special caring relationship between the facilitator and the scholar, yet universities are not places where such relationships are valued. We can choose to develop our relational skills (our own self-studies are particularly useful in this regard), but our efforts to improve in this area are unlikely to be rewarded in the academy. Also, when we facilitate self-study, our focus on the individuals who own the study keeps us in the background. For these reasons, there is a real risk that the valuable work of the facilitator will be unseen, not protected or supported.

Open and honest dialogue is a necessary condition for transformative self-study, with exchanges that might nudge thinking in new ways. This project is complicated by the increasing diversity within academic communities of practice. It requires a particular type of communication skills and demands a capacity for reflexivity. Of course, these skills are actually developed through engagement in self-study, and the self-study process can lead to a deeper appreciation for the diversity of ideas, perspectives, and values shaping professional experiences and institutional contexts. But the learning process is a risky one, with the potential for miscommunication and misinterpretation among those with different values and backgrounds.

What degree of safety is required so that a professional will successfully undertake the risks associated with critically reflective self-study? We owe one another safe spaces for risk-taking, if we are truly interested in challenging one another to growth. Providing adequate support for self-study is especially difficult when time is short – a problem that is all-too-common among busy professionals working in a performance-based environment. We all can take some action to exercise responsibly the power we hold to facilitate learning through self-study: for example, not complaining about the paperwork involved in doing self-studies but actually responding to the reports we read, listening carefully, asking questions, encouraging plans and following up. A compassionate appreciation for the personal risks taken by others can lower barriers to self-study scholarship.

Performative conditions in higher education complicate the transformative process and can serve as a barrier to achieving meaningful outcomes through self-study. Performativity refers to the use value of individual academic work for optimizing cost-effectiveness and increasing competitiveness of a person or institution (MacKenzie, McShane, & Wilcox, 2007). Ball defines performativity as:

... a technology, a culture and mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change – based on rewards and sanctions (both material and symbolic). (2003, p. 216)

Impression management and emotional management are critical tasks of what Ball (2003) has termed ‘performative fabrication’. The contemporary academic must ‘perform’ herself, creating convincing depictions of her achievements and aligning her activities with performance and tenure criteria. In fact, self-studies are one kind of performance we are expected to engage in. Yet there can be profound personal and institutional costs in trying to sustain and live up to our fabrications: dissonance, dividedness, anxiety and alienation. The irony is that a performative culture has given rise to self-study documentation practices, yet within such a culture it is very difficult to safely engage in the kind of self-study that will teach us something new about ourselves and thus empower, enlighten and transform. How can we counter the dehumanizing culture of the performative university? How can we make it more likely that in responding to the crises of working within performative conditions we overcome anxiety and enable transformation?

Academic practice (including self-study) is rooted explicitly in an ethic that embodies an ideal of *authenticity* (as opposed to an ideology of performativity) is a possible response. While the language of performativity overshadows and silences discussions of ethics and authenticity and of the moral purpose of the university, authenticity remains relevant to the professional project of becoming a responsible educator, intellectual and academic. Authenticity entails being true to one’s self: ‘There is a certain way of being human that is my way’ (Taylor, 1991, p. 29). Our authenticity is unique, but it is socially situated: being conscious of self, other, relationship and context (Cranton & Carusetta, 2004). The authenticity required for self-study is risky business in a performative environment, yet at the same time we can respond to the performative culture of the university by naming it as such, and can counter its dehumanizing ideology by courageously adopting an ethic (and a language) of authenticity. Elsewhere, my colleagues and I have argued that authenticity in higher education is strengthened through attention to intellectual, emotional and spiritual growth (MacKenzie, McShane, & Wilcox, 2007). Self-study affords a wonderful opportunity to promote this kind of development – the authentic growth that enables transformation.

### **Committing to self-study**

When we aim for transformation – though the desired or necessary change may be at the personal, relational, institutional and/or global level – we must be prepared to ‘work on ourselves’ (Tennant, 2005). Fortunately, wide ranges of techniques, processes and practices – or ‘technologies of the self’ – are available to us (Chappell, Rhodes, Solomon, Tennant, & Yates, 2003). Before committing to self-study as a methodology for transformative educational development, we should consider how

willing we are to use these technologies to know, manage, (re)create and care for ourselves.

### ***Knowing ourselves***

Most of us are familiar with the idea that it is a good thing to know who we are, as much as this is possible, because we bring ourselves, to a greater or lesser degree depending on circumstances, to our professional roles. Reflective journaling and collecting feedback from others are two common examples of the many techniques, processes and practices available to us for gaining insight into the values, qualities, perspectives and experiences that frame our professional practice. However, before committing to self-study, we should consider our underlying motivations and question whether we are truly open to knowing ourselves.

### ***Managing ourselves***

Ultimately, self-knowledge is not enough to enable transformation – it is also necessary to change those things that work against transformation, such as everyday habits, patterns of interpersonal relationships, community and organizational structures, etc. Our efforts may be directed inwardly towards correcting our habits and values, or outwardly towards modifying the social, historical or cultural conditions that limit us. Either way, we will need to implement and consciously practice new behaviours and attitudes and new strategies for relating to self and others. Are we willing to do the hard work that underlies and sustains transformation?

### ***(Re)creating ourselves***

Transformation is about the possibility of creating a ‘new self’ in the world. The ‘old self’ may be discarded or reinterpreted or strengthened, but the basic idea is that we become active agents in finding new ways to move ourselves forward. This typically involves re-visioning our professional roles and responsibilities, for example, or rewriting and pursuing new professional career narratives. Visioning exercises are fairly common in higher education – typically surrounded by questions of whether they are intended to help us imagine a real future that reflects our strengths and weaknesses, or are simply window-dressing and positioning ourselves so as to appear to be what we desire to be. Are we sincere when we say we are willing to become a different kind of academic, if such change is called for?

### ***Caring for ourselves***

The profound rethinking that characterizes transformative learning will inevitably affect our relations with colleagues and students and may have a remarkable impact on our professional ‘sense of self’. We need to take seriously the affective, intuitive, extra-rational and intensely personal and interpersonal aspects of self-study. Support for emotional, holistic, psychological and spiritual growth is woefully inadequate in performative higher education contexts. And so, in taking on self-study, we must be prepared to care for ourselves and to accept the care of others when it is offered. Can we foresee any opportunities to initiate respectful and reciprocal relationships with colleagues?

## Doing self-study

Educational developers who decide they are willing to engage in self-study scholarship may wonder how to begin. A gradual, staged approach to implementation is usually more rewarding than a sudden, intense immersion in a full-blown study. I have developed a three-part framework, originating in Candy's (1991) model of self-directed learning, as one possible means for promoting transformative development through authentic self-study.

### *I. Preparing for self-study*

Self-study is demanding, and many of us can benefit from activities that strengthen our capacity for this kind of research and development. As preparation for self-study it can be helpful to identify our personal learning styles and preferences, assess the conditions for learning in particular departmental and instructional settings and the impact of the institutional environment on our own capacity for learning, and search out available resources to support our learning. Most importantly, we'll need to reflect upon our interests and then make connections with others who share our interests. Finding practical ways to set aside time for self-study is also important at this stage.

### *II. Engaging in self-study*

At the next stage, we are ready to plan an informal, small-scale study. Rather than beginning with a problematic situation, I prefer first to focus my critical gaze on something I am currently doing that seems to be working well. I also like to start with self-study techniques with which I am familiar.

Of course, a successful self-study begins with a good issue or question. I have found that self-studies are most rewarding when: they are about something I care about and something I have personal experience with; I do not begin with an 'answer' to my question, and am prepared to be surprised by what I learn; the learning will have practical implications – for me and my practice; and, the topic is relevant to colleagues in similar circumstances who may benefit from my learning. 'The aim of self-study is to provoke, challenge and illuminate rather than to confirm and settle' (Bullough & Pinnegar, 2001, p. 20).

In deciding upon self-study methods to use, I keep in mind the following guidelines:

- Critical reflection (or any process that enables 'discernment') is an essential tool.
- The methods used must produce evidence to support claims, and 'sufficient evidence must be garnered that readers will have no difficulty recognizing the authority of the scholarly voice, not just its authenticity' (Bullough & Pinnegar, 2001, p. 20).
- Use whatever method works! Methods may be drawn from any number of research traditions; the key factor in choosing a method is whether it will provide insight into the question under consideration.

Our self-studies may be conducted alone or in collaboration with others. As one means of promoting independent self-study, I recommend the use of journaling or other types of informal personal writing strategies that allow us to reflect deeply on our professional experiences, values and assumptions (Moon, 1999; Watson & Wilcox, 2000).



See Figure 1 for some suggested exercises to get started. Another approach would be to monitor and evaluate our practices, by setting personally meaningful criteria for performance and collecting varied evidence regarding current level of competency (Hammond & Collins, 1991; Oberg, 1988). A third approach to independent self-study is the development of a professional portfolio/dossier, grounded in a personal philosophy statement (Redman, 1994).

In the realm of collaborative self-study, I suggest that developers build and explore relationships with colleagues that will foster our own professional development as well as others' learning, and that we collect and use feedback from the colleagues we work with (Rando & Lenze, 1994; Weimer, 1988). We can also learn through such collegial approaches as action-learning networks, discussion groups, peer feedback and peer mentoring (McGill & Beaty, 1995; Collier & Wilcox, 1998; Hutchings, 1996; Zachary, 2000).

### III. From study to scholarship

At some point, we will feel ready to engage in more formal self-studies, confident that we have the skills to collect significant evidence about important topics. A formal self-

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Think back over your experiences as an educator. Recall an incident that stands out for you – because it was challenging, frustrating, disturbing, exciting, etc. Describe this incident in a specific and concrete way.

*Method 1. Three readings help us to read closely:* Close readings may deepen our insight, helping us to illuminate assumptions, values and beliefs that shape the most ordinary moments of teaching and learning.

- a. do a 'quick reading' of the incident.
- b. 'zoom in' close to the text to examine and interpret what you have written: what words and phrases do you notice and what is their meaning in this story?
- c. 'zoom out', as if in a bird's eye view, to identify insights gained through the close reading of this story and to connect your insights to what you already know.

*Method 2. Altered point of view case study:* Writing about yourself objectively as 'he' or 'she', or trying to understand someone else's motivations by writing about them as 'I', allows you to distance yourself emotionally from a situation or to look at it from another's point of view.

- d. rewrite your incident, telling the story either in the third person about yourself (e.g. instead of saying, 'I told my students...', say 'Susan told her students...'), or in the first person as if you were someone else in the story (e.g. instead of 'my students appeared bored...', write 'I was not very interested in what my teacher had to say...'). Allow the story to change shape as you retell it.
- e. or, rewrite the incident as if it took place in a different geographical location, or in a different time. For example, if you described an incident as it happened in the past (I saw...), rewrite it as if it is happening now ('I see...'). Again, allow the story to change shape as you rewrite it.

*Method 3. Creating an artistic representation/interpretation:* Not all reflection is 'thoughtful'. By engaging our senses, we can respond more holistically to particular incidents and identify intuitive and emotional meanings.

- f. Write a poem, or short story, that captures the essence of the incident and/or expands upon it.
  - g. Write a one-act play based on the incident. Who would you choose to play each role? If it was a musical, what songs would be in the score?
  - h. Draw, paint or collage a visual representation, interpretation or response.
  - i. What other forms of expression might best suit this incident – A circus? A game? A dance? Who could you collaborate with in creating something that expresses the meaning of the incident?
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Figure 1. Exercises to explore self-study methods.

study is an opportunity to explore our experiences, beliefs, understandings and practices concerning a particular aspect of educational development so that we can improve our educational development practice. Self-study scholarship asks us to consider how we will document our learning and how we will share it with others so that they can better understand this aspect of educational development and then consider ways to improve educational development. Scholars should be able to clearly describe how their self-study outcomes may contribute to a scholarly field of practice, in this case, the 'field' of educational development. In going from study to scholarship, this is where educational developers can most make a difference to the growth of educational development as a field of study and practice.

## Conclusion

Technical knowledge of practice – without critical self-reflection – is no longer sufficient in an increasingly diverse, complex and rushed world. Wisdom gained through self-study is the foundation for authentic and transformative engagement in educational development, opening up new avenues of understanding, communication and action.

Hope for self-study as an approach to transformation lies in the ways we collaborate across diverse communities in identifying the challenges that are there for all of us in our performative institutions, and determining how we can negotiate and manage them together. When professionals and institutions together assume a caring yet self-critical stance and integrate the philosophy and varied tools of authentic self-study into professional and educational development programmes and institutional assessment practices, we have the opportunity to transform ourselves, our practices and our institutional cultures. When we do not assume a self-critical stance, others may step in to do the assessment for us.

Self-study is well suited to a scholarly approach to educational development, allowing us to contribute to the 'discipline' of educational development and to improve our own practice. My hope is that we may come to better appreciate the need for self-studies that encourage us to care for our authentic selves and cultivate more meaningful and sustainable academic, professional and institutional identities. Such self-studies offer a route to meaningful transformation.

## Notes on contributor

Susan Wilcox is associate professor in the Department of Women's Studies and the Faculty of Education at Queen's University, Canada. She has over 15 years experience as an academic developer in university settings. Susan's scholarship is concerned with emancipatory learning, dialogue and critical reflections, self-directed inquiry and transformative models of continuing professional education and development.

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