Descriptions of Remote Academic Advisor Facilitation of Graduate-Level Learner Perspective Transformations

Submitted by

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Grand Canyon University

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Successfully Defended and Approved by All Dissertation Committee Members

April 29, 2025

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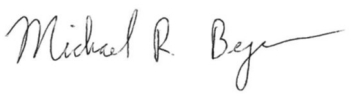

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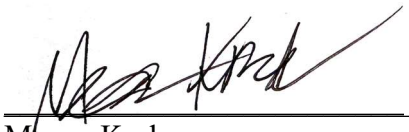

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Abstract

As adult learners progress through courses term-over-term, their personal, professional, and academic perspectives change naturally, but sometimes advisors also intervene to direct intentional learner perspective transformations. To better understand this phenomenon, the purpose of this research was to collect rich, descriptive detail to understand what occurs when an advisor engages with and makes efforts to influence the perspectives of different graduate-level learners. A qualitative descriptive approach was used to individually collect 53 semi-structured interviews (*n=18*) and open-ended questionnaires (*n=35*). Two research questions were addressed, including (RQ1) how do advisors decide 'when' and 'how' to transform a learners' perspectives, and (RQ2) 'what is involved' in facilitating transformations in graduate-level learner perspectives. To analyze collected data, Braun and Clarke's reflexive thematic analysis process was utilized. Key findings from the first research question indicated 'when' the decision to facilitate a transformation takes place, was a matter of timing (3 themes). Additionally, 'how' this decision takes place (5 themes) involves recognizing both planned and unexpected milestones occurring along the academic journey. To better understand the steps involved in this process (RQ2), 15 final themes were grouped into 6 conversational phases as described by participants. Each of the identified themes contributes significantly to the understanding of what is involved in facilitating transformations in learning perspectives. As a result of the contributions made from this research, the experiences of academic advisors interacting with learners in need of a transformed perspective is clearer.

Keywords: Remote academic advisement, graduate-level learners, facilitating transformation, and learner resistances to change

Dedication

To my incredible husband, thank you for honoring my passion for education and providing unwavering support throughout this entire journey. Your love and encouragement have been my foundation.

Mom, for always inspiring me to ‘stir the pot’ and for shaping me into the researcher, writer, and editor I am today. Dad, thank you for instilling in me a relentless work ethic and for teaching me perseverance, especially in moments of doubt.

To my dear G, B, & Q, you are the future of knowledge. Your curiosity, intelligence, and boundless potential inspire me every day. It is for you that I dedicate myself to creating a better world for you to learn and grow, where you can thrive and discover even greater possibilities.

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To my extended family, your pride in my accomplishments has made me feel cherished and supported. To Sheila, thank you especially for your unwavering support, love, and kindness.

And to my beloved grandfather (Papa Dave), though you are no longer with us, your words still resonate deeply in my heart. You taught me that I could be anyone I wanted to be, but if I set my mind to something, I must do it with all my heart. Thank you for your wisdom, which continues to guide me.

This dissertation is as much yours as it is mine.

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I also wish to thank the many higher education leaders who took the time to participate in informational interviews, helping me identify the most impactful topic space for this dissertation. Their insights were crucial in shaping the direction of my research.

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Chapter 1: Introduction to the Study

Introduction

This qualitative descriptive study sough to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations. One institution in the Middle Atlantic states provided a focused cross section of detail regarding this phenomenon. The adult learner population (age 25 and above) represents a significant portion of the contemporary college and university learner population due to expanded innovations, curriculum access, and learner capabilities (Klempin et al., 2021). Increasing demand for skilled professionals also creates the need for an educated workforce (Gordon, 2019), leading to more adult learners returning to the classroom for graduate-level programs (Hall & Liva, 2021). In higher education, academic advisors serve as additional teachers outside of school, addressing the diverse needs of adult learners regarding curriculum, institutional policies and processes, and a wide range of personal and professional topics (Lowenstein, 2020). Throughout the learning process, many changes may occur which force a learner to face alternative perspectives. When they integrate this alternative with their prior knowledge, the result is a transformed perspective.

Understanding where the learner is coming from (as a human being) and their future goals is a complex task. When an advisor takes the time to accurately identify this information about a learner, they are better prepared to provide the right guidance and support in return. A transformation in learning perspectives can be triggered by a variety of factors, such as new experiences, exposure to alternative ideas, or critical reflection on feedback received. Graduate-level learners in particular, benefit from curriculum that is

individualized and experience-based, because this allows them to practice real-world applications for skills they will need in their current or future profession (Wright-Mair et al., 2022). Adding to the challenge of this advisement process, not all learner perspective transformations have a tangible output from the student. For some learners a transformed perspective might be evidenced in an improved grade, positive feedback from an instructor, or by a timelier submission of work. Where other students might demonstrate their new perspectives by employing a more efficient approach to a particular assignment, or deeper engagement with course materials. Skilled advisors can generally identify when they have successfully changed a learner's ways of thinking, understanding, or their belief system about learning. When a learner undergoes a perspective transformation, they can see the world in a new way and approach future situations with greater skill and capability.

This chapter introduces the background of the study and outlines how advisors' experiences facilitating learner perspective transformation is situated within educational psychology research. The themes involved in this study inform how transformative advisement approaches continue to gain prominence in adult education research. An advisor's primary goal is to recognize the capacity of individual learners to receive and translate new information, then use this knowledge to facilitate a coordinated action from the learner (Lazarowicz & McGill, 2022). To achieve this task, advisors must take steps to explore the students' situation, identify potential alternative perspectives, and guide the learner towards a specific outcome. Identifying a learners perspective guides the advisor to accurately diagnose the barriers preventing the learner from achieving academic success. Though educational advisement practices are not unanimous, a substantive

theory should be employed to create more predictable and growth-oriented interactions with learners (McGill, 2021). This study seeks to provide clarity regarding how remote academic advisors describe facilitating graduate-level learner perspective transformations.

Due to the constant influence of change, advisors can make a meaningful impact on learners by helping them manage the effects of change throughout their individual program lifecycles. Literature to better understand how academic advisement staff interact with and strategically guide the actions of learners can provide needed clarity for how advisors impact learners experiencing change. Evidence shows graduate students benefit from engaging with others in their scholarly learning community, as this mentoring experience has a transformative influence on the skills a learner develops (Hall & Liva, 2021). A population of advanced learners (such as those in graduate-level programs) return to education in their adult lives with the goal of promoting their current career opportunities or for mid-career changes. The shorter program duration also may mean these learners can complete their programs and reach professional goals in quicker timeframes. A transformative approach to academic advising enables learners to cultivate agency in their learning approaches. This kind of engagement allows the advisor to promote knowledge development in individual learners by identifying their potential barriers and reminding them of the importance of their well-being throughout the process (Gopaldas et al., 2021). This study expands the literature on how academic advisors help learners manage change throughout their program by exploring advisors' experiences facilitating learners' perspective transformations.

The actions that advisors take to identify learners with needed perspective transformations are measurable. However, the strategies they develop to encourage a learner towards accepting potential alternative perspectives are less tangible. The result of a learner accepting alternative perspectives and reconciling this newly gained information with their prior knowledge is a transformed learning perspective (Mezirow, 1978). The more knowledge that can be gained about the efficient and practical application of advisement theory, the easier it is for higher education institutions to understand how they might cultivate an environment that supports positive transformation. Therefore, this study utilized a transformative approach to gain remote academic advisors' descriptions of experiences working with graduate-level learners. Higher education institutions rely on academic advisement staff to facilitate students' access to needed resources and promote learner engagement in the learning community (Museus, 2021). As advisors provide individualized support to learners, they gain the experience of seeing how different advisement tactics they use, are received, then translated into action by the learner. This study contributes to prior research by gaining an understanding of how remote academic advisors describe facilitating graduate-level learner perspective transformations.

Background of the Study

Academic advisors are responsible for facilitating institutional attempts to promote learner success and program retention. While advising can include guiding and directing educational activities, the role also includes vital life coaching components (Sepulveda & Birnbaum, 2021). Advisors coach learners to identify goals and reach optimal performance; improvement in their submitted coursework would be an example of optimal performance. Additionally, advisors continually monitor learners' academic

progress to determine at-risk behaviors and effectively plan interventions (Klempin et al., 2021). Changes in learners' behaviors – as evidenced by declining grades, attendance, or attitudes – can indicate a learners' resistances to accept necessary transformations. As learners progress through courses term-over-term, their personal, professional, and academic perspectives are apt to change naturally but sometimes the advisor must step-in to direct intentional learner perspective transformations. The actions that an advisor takes to influence learners into transforming their perspectives about something, were the central focus of this study.

The higher education field has a rich history of scholarship and the promotion of knowledge as a means for building a better society. Advisors play a critical role in learners' knowledge development by building rapport with and helping them identify needed information and resources throughout a full program of study. Future research is needed to investigate different advisement approaches (Hall & Liva, 2021) and describe how advisors humanize the learning process to promote transformations in learners' perceptions (Liu & Ammigan, 2021). At times the advisor may draw upon their own prior learning experiences or relay a story from learners they have supported in the past. Doing so allows the advisor to show the learner that they are not alone and help them identify ways to improve their circumstances. Ways advisors identify learners' perspectives and conceptualize alternative points of view may be used to enhance the advising profession (Liu & Ammigan, 2021). Using this information, institutional leaders can better predict potential learning outcomes and identify resources for a given learner population.

Adult learners require unique advisement support, increasing the demand for research regarding how advisors facilitate different actions in learner populations. In a

remote advisement model, institutions can recruit staff from a more diverse employment population leading to opportunities for more diverse matching of resources to learner needs. Helping facilitate adult development and learning requires an acute awareness of a person's history and lived experiences (Mezirow, 1978). Which is why culturally-aware advisors can make more meaningful impacts on diverse learner groups. While graduate-level learners require a specialized form of mentorship, the exact processes that are most impactful are still being explored (Hall & Liva, 2021). There is no one-size-fits-all method for effective academic advisement with all special learner groups, therefore defining the everyday activities and strategies advisors use has benefit.

This study addressed the problem of limited understanding regarding what strategies and activities advisors engage in when attempting to facilitate a transformation in learners' perspectives. The phenomenon that needed to be better understood was how remote academic advisors describe facilitating graduate-level learner perspective transformation. Transformative learning is a more engaging approach for learners in virtual graduate programs because of the increased interest in promoting learner engagement with the curriculum at this level (Heddy et al., 2021). Learners with more significant social investment in their academic environment tend to experience higher graduation rates, more manageable student debt levels, and lower loan default rates (Ober et al., 2018). This need justifies the purpose for this research, as the potential applications for transformative learning in academic advisement extend to any adult learning application.

Understanding the experiences of remote academic advisors can inform of ways to support and develop this professional role further over time. Future investigation into

the ways transformative learning can be used to investigate academic support services and promote learner self-awareness are desirable (Jaakkola et al., 2022). Research to understand how transformative advising activities impact student success (Mbindyo et al., 2021) and which conversational strategies best address different academic challenges (Gopaldas et al., 2021) were needed to this point. This study furthered the scope of research on academic advising as a profession by seeking to clarify how remote academic advisors describe their experiences facilitating graduate-level learner perspective transformations at one state-affiliated public institution in the Middle-Atlantic states.

Definition of Terms

Terminology used to define meaning in the study are detailed in this section for clarity. The language relevant to remote academic advising of graduate-level learners at one state-affiliated public institution, are further defined to position this study in related literature. Research terminology tends to be problematic to define because many commonly used terms hold additional meanings in the English language (Talbott & Lee, 2020). Using the following operational definitions, the study is positioned to gain descriptive detail regarding advisors' experiences working with graduate-level learners. To add further contextual evidence for each term, its influence on the phenomenon of transforming learners' perspectives is also outlined.

Academic Advising/Advisement. While academic advising is an action that practitioners perform, an academic advisor would service a strategic organizational need. Academic advisors guide learners toward developing strategic plans and achieving established academic milestones (Wang & Houdyshell, 2021). In this study, academic advisement is the intentional act of intervening with a learner to identify their

perspectives about something, help them acknowledge value in alternative perspectives, and use this knowledge to transform the learners' perspectives. Advisors use critical decision-making to identify the learning needs required of individual learners, to form a professional identity (McGill, 2018). This process involves an advisor acting as the facilitator for learners to develop an appropriate learning perspective for use in future situations.

Academic Advisor. In this study, an academic advisor refers to a full-time professional who assists adult learners with various education-related needs. This study has identified academic advisors, otherwise known as success coaches, from one institution in the Middle Atlantic states to provide a clear understanding of advisement practices in an established environment. An advisors' self-awareness is needed to transform learning perspectives and create competent discourse opportunities with diverse learner groups (Jaakkola et al., 2022). To ensure participants have developed the professional capacity to effectively identify and facilitate transformations in learner perspectives, a minimum benchmark of two years advising graduate-level learners is used to further define this population. While other staff may advise learners on topics influencing academic outcomes, this study defines an academic advisor as an experienced practitioner that is primarily responsible for addressing and supporting the academic needs of a learner population.

Academic Problems, Issues, and Challenges. The study collected subjective descriptions of advisor's experiences intervening with learners to help them transform their learning perspectives about a problem, issue, or challenge they are experiencing. While the scope of potential issues which could impact a learner is extensive, these

impacts tend to fall into either personal, professional, or academic categories. Any topic a learner discusses with an advisor can be considered a challenge they need to address, even if the resolution is obvious or simple to reach. An advisors' intention to transform a learners' perspectives regarding something impacting their academic progress, was the defining benchmark for collecting and analyzing data sources for this study.

Learner Perspective Transformation. The transformation of a learner's perspective is only sometimes demonstrated or fully understood for the value it contributes to knowledge development. This study defines learner perspective transformation as the process involved in and the result of an adult learner leveraging prior knowledge in combination with newly discovered information to create a new sense of meaning. Mezirow (1978) introduces a transformed learner perspective as the ultimate long-term goal of adult learning. It is necessary to recognize the role of historical events in how a person forms knowledge or awareness. Still, new information must also be considered and reconciled with prior understanding by investigating alternative perspectives when available. This study recognized the processes (activities and strategies) involved in learner perspective transformation as more contextually essential to the learning process, than course or program outcomes.

Anticipated Limitations

The anticipated limitations of a research project indicate expected impacts and constraints identified as significant to the investigation of a particular phenomenon. Qualitative research can be limiting for an underprepared researcher due to variations in philosophical characteristics and researcher interpretation that can be applied across the social and behavioral sciences (Creswell & Poth, 2018). This section acknowledges the

unique ways that the study scope imposes and addresses anticipated limitations. The identified limitations are further defined to acknowledge how the researcher acted to mitigate their impact on this research. While these limitations could be viewed as research weaknesses, in this study they were used to position the research approaches and designs used.

- Limitation 1:

  As the researcher also works in the academic advisement profession, an advanced level of awareness regarding the terminology used and experiences being communicated by participants was expected. These preconceived notions may lead to potential researcher bias, which would prevent the researcher from addressing nuances and terminology that need definition. To manage this limitation, the researcher performed member checking on research data, by having participants review transcripts to verify content. Additionally, the researcher used bracketing to identify their preconceptions about the research process.

- Limitation 2:

  While a tenure of two years or more should ensure professional capacity for participants in this study, not all advisors have the same experiential knowledge. A participating advisor needed matching conversational skills to meet the individual needs of diverse learner groups, so it was important to also interpret how meaning may be made for the learners these advisors support. It was challenging to accurately identify the contextual and situation-specific information that can influence a learner’s perspectives. Therefore the researcher needed to collect clarifying details from participants to verify the meaning behind statements relayed. The researcher was prepared to introduce at least two additional open-ended, probing questions, per main research question asked during data collection.

- Limitation 3:

  It can be challenging for advisors to recognize and acknowledge their own skills when it comes to facilitating a learner's perspective transformation. While transformative approaches to teaching and learning are more prominent today than ever, there were still gaps in participant awareness of their own professional strategies. A participant advisors' individual understanding of their role guiding learners towards transforming their perspectives about something could be a limiting factor in this study. The researcher managed this limitation by using member checking to ensure participants confirmed the meaning behind statements they made. Additionally, the researcher prevented transferability of their own

perceptions onto study participants by communicating the working definitions for perspective transformation before data collection began.

Summary and Organization of the Remainder of the Study

There was a clear need for an innovative support structure to advise and guide adult learner populations, particularly those seeking advanced degrees. Advising is an impactful form of teaching for adult learners, utilizing various learner-centered approaches and following a structured curriculum to identify the unique goals of diverse learner groups (Lowenstein, 2020). As academic advising gains further acknowledgment for its contributions to the retention and success of diverse learner groups, descriptions of advisor's experiences increases in value. Advisement effectiveness can be interpreted by looking beyond an advisors' expectations of the interaction, instead focusing on the transformative values of intervening with learners to influence their decision-making (Lozada & Johnson, 2019). This research contributed to understanding about how academic advisors experience advising learners through perspective transformations by gathering descriptions of this phenomenon directly from these practitioners.

A transformative shift continues to influence how advisement professionals view the activities involved in and strategies they develop to effectively advise adult learners. Transformative discourse leads to effective college competency development due to greater learner self-awareness and deeper connections with the program curriculum (Jaakkola et al., 2022). Maintaining a general awareness of the words that a learner is expressing while developing a mental plan for available solutions is a learned advisement skill. The ability to intuitively guide conversations with learners in various academic circumstances is expanded as advisors gain experience. When successfully applied, a transformative learning approach is more likely to motivate a learner by promoting the

value of engagement with coursework (Esmail & Matthews-Roper, 2022). A transformative approach to advising adult learning is impactful because it acknowledges the inevitability of alternative perspectives in forming new knowledge.

This study proposed to gain understanding for how advisors facilitate graduate-level learner perspective transformations by collecting interview and questionnaire data from at least 30-35 advisors at a state-affiliated public institution in the Middle Atlantic states. Upon approval, it was anticipated that it would take 2-4 weeks to collect all data for this study. An additional 2-4 weeks were predicted to be needed for verification of interview transcriptions and to upload all data for qualitative review. After this point member checking was to be conducted with participants. After all data was collected and data verified, the analysis process would begin, which was anticipated to require another 2-4 weeks to complete. When done, the researcher would report the data, estimated to take an additional 2-4 weeks to complete. Following this general timeline, data collection, analysis, and reporting for this study were expected to take no more than four months to complete.

Though the unknown factors of academic advising can be challenging to pinpoint, further research helps close this knowledge gap. As we continue to explore the current and future capabilities of the academic advisement role, the subjective accounts of best practices and the most efficient strategies used to facilitate transformations in learner perspectives have great value. Implementing transformative advising approaches is vital because this role leads to more remarkable short- and long-term student success outcomes (Mbindyo et al., 2021). How each advisor may approach facilitating learner perspective transformations might inform professionals of potential ways to better influence different

learners. This study sought to understand how remote academic advisors' gain information from learners, combine it with their own experiential knowledge, and use it to develop individualized academic progress plans.

In the following chapter (2), the literature used to frame and define this study is reviewed further. Components included in this section are a review of how the problem space was identified, the theoretical foundations, as well as relevant literature and identification of the problem statement. Additionally, the next chapter (3) details the methodological aspects of this study. Content in that section includes the purpose of the study, research questions, rationale for a qualitative methodology and research design, the identified population and sample, as well as data collection and analysis procedures. Further details provided in the methodology section are ethical considerations, trustworthiness, and identified assumptions and limitations affecting the research. Then, chapter (4) outlines how the data was collected and analyzed, including a presentation of the results and outline of how limitations were addressed. In the final chapter (5) a summary of the study informs of implications for research findings, as well as recommendations for future research and practice.

Chapter 2: Literature Review

Introduction to the Chapter and Background to the Problem

University advisement staff routinely works with diverse groups of learners to resolve a range of academic challenges and promote program retention. Academic advisors service learners worldwide from remote (i.e., at home) offices at one state-affiliated public institution in the Middle Atlantic states. These advisors interact with learners in both undergraduate (associates, bachelors, and related certificate) programs and graduate-level (master's and related certificate) programs. Due to the advanced professional competencies of graduate-level learners, the activities and strategies advisors use differs from those applicable to undergraduate learners. A transformative approach to academic advising involves iterative phases of asking learners questions to promote micro-transformations in their feelings and learning perspectives (Gopaldas et al., 2021). Each iterative phase would be followed by an opportunity for the advisor to expedite and ease the learner's ability to elaborate on and accept alternative learning perspectives. Facilitating a transformation in graduate-level learner perspectives requires action on both sides of the advisor-learner relationship. Due to a lack of comprehensive research to-date, this study seeks to describe how advisors' facilitate these learner perspective transformations.

This chapter details the background of facilitating learner perspective transformations as a problem of interest. Included in this reflection on the background of this problem space are the theoretical foundations used for this study, a review of prior related literature, and identification of the problem statement. Using the themes of transformative learning and academic advisement, literature was sourced for this study

using the following keywords: ‘remote academic advising’, ‘facilitation of learner perspective transformations’, ‘advising graduate-level learners’, and a ‘transformative approach to advising’. These terms were selected to provide a comprehensive, yet focused, perspective of the identified phenomenon. Databases used to source literature included the NACADA Journal, the International Journal of Emerging Technologies in Learning, Problems of Education in the 21st Century, the International Journal of Evidence-Based Coaching and Mentoring, the Journal of Transformative Education, and Frontiers in Education. Criteria used to define inclusion in this research followed transformative learning and academic advisement themes because they have the greatest potential impact on advisors as they interact with adult learners.

Background of the Problem

A clearer understanding of how academic advisors experience transforming learners’ perspectives may benefit the adult learning industry by improving the knowledgeability of its decision-makers. It is the advisors’ goal to motivate and enable a students’ abilities to overcome learning challenges in accordance with institutional academic progress standards. Jack Mezirow (1978) first emphasized the importance of a transformative approach to advising adult learners by contributing that this population experiences learning new information uniquely. Instead of absorbing new knowledge at face-value, adults must reconcile it with what they already know about the world, resulting in a new, transformed perspective. Using their preexisting knowledge of the institution and higher education processes, an advisor might leverage the information they gain from a learner and use it to determine plans the learner can take to overcome challenges they are facing. A skilled academic advisor may then efficiently consider

individual students' skills and abilities to make strategic decisions regarding how the learner ought to proceed (Loucif et al., 2020). How remote academic advisors go about determining which graduate students to intervene with and the approaches they will use to transforming the learners' perspectives, are important to understand.

Some higher education institutions rely on their advisement staff to form meaningful connections with different learner populations, particularly when operating remotely. Advisors in this setting must virtually identify and intervene when issues arise or when the learners' perspectives are interfering with their ability to progress academically. A technological revolution catalyzed adult learning after the turn of the 21st century due to the influence and resources available when learners were no longer limited by physical proximity (Mezirow, 2003). In the following decades, technological advancements grew rapidly, including expanded access to personal computing systems and the internet. Academic advisement as a profession also transitioned to involve the coaching of learners towards taking intentional actions which support the learners best academic interests. A prior study on transformative mentorship approaches confirms that graduate-level learners benefit from improved academic support to increase learner satisfaction with curriculum (Hall & Liva, 2021). As a result, higher education has continued experiencing transformative shifts in how practitioners engage with and support diverse adult learner populations.

As literature continues to grow and increase clarity for the academic advising profession, first-person perspectives become more valuable. Therefore, this study sought to gain the perspectives of academic advisors and exclude that of learners because the advisors' descriptions of this process was underrepresented. Research investigating how

transformative academic approaches influence learners have been predominately focused on this experience from the students' perspective (Mangundu, 2022; Wang & Houdyshell, 2021). To fill this gap in the literature, the current study seeks to gain clarity for what the advisor feels, thinks, hears, and what information they consider when making advisement decisions. Individual advisors must develop their own multi-layered approach to help learners slowly adapt to change (Klempin & Karp, 2018). Each advisors' approach may differ, depending on the learner they are working with and the perspective transformation that is needed. What still needed to be understood, was how different advisors experience intervening with learners to transform their perspectives about something impacting their academic success.

Identification of the Problem Space

This qualitative descriptive study aimed to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations. To understand the evolution of this problem, this section reviews what still needed to be understood. Building upon a theoretical foundation of Mezirow's Transformative Learning Theory (TLT), the research sough to understand how advisors' describe the experience of transforming a learners' perspectives about something influencing their academic progress. As Jack Mezirow (1978) introduced in the article *Perspective Transformations,* transformative learning is the process adults undergo to reconcile prior knowledge with new information gained. The result of this reconciliation is a transformation of the learners' perspectives, which acknowledges their prior understanding while integrating meaning from the new information gained. Applying

transformative learning approaches to academic advisement research allowed for the exploration and promotion of standard practices that define this profession.

Evolution of the Problem

Academic support staff are not a new concept in higher education. Prior to the 1950's the role of providing academic and program guidance to advanced learners was taken on by faculty advisors (Hart-Baldridge, 2020). While faculty may contribute valuable experiential and professional knowledge to guide learners, they are also responsible for teaching courses, so some administrative and coaching aspects of advising were less manageable in this model. As educational institutions explored other methods for advising learners, research priorities in this field shifted. Mezirow (1978) contributed transformative learning theory to explain a differentiation he identified in the learning processes, occurring when adults return to higher education later in life. His observations were based on observations of experiences his wife and her classmates had returning to college as adults. Towards the end of the 1990s, applying transformative learning approaches in different educational settings led to more autonomous, academically responsible behaviors from learners (Mezirow, 1997). The focus of research at this time was on identifying the new role of academic advisors in higher education.

Into the late 20th century, academic advisement research focused on the identification of approaches and methods to effectively advise different learner groups. Where in the 1980's a prescriptive, authoritarian-based advising approach was used, into the first decade of the 21st century literature showed this approach to be ineffective and replaced it with a more student-centric, collaborative approach to academic advising (McGill, 2019). This transition marked a focus from 'what academic advising is' to 'how

academic advising influences learners'. Further research in the early 2000's focused on how transformative learning theory could be used to investigate effectiveness of support services that institutions provide, leading to robust applications for TLT across educational disciplines (Kitchenham, 2008). Different institutional structures (i.e., public vs private, state-affiliated vs corporate-owned) have developed unique policies, processes, and communication structures for their advisement staff. As these institutional dynamics may influence an advisors' ability to engage with learners, therefore finding the right mix of advisement support resources for a given population of learners was necessary.

Trends in higher education research outline the path this profession has followed to keep up with innovations in technology, communication, and knowledge development. Traditional college campuses catered to lecture-based learning and relied on faculty members to provide academic guidance to graduate-level learners. However as of 2020 over 57% of all academic advising functions were being performed by primary-role academic advisors (Troxel & Kyei-Blankson, 2020). At the identified institution of record, in the Middle Atlantic states, a notable undergraduate population of over 45,100 learners is serviced by its academic advisors, who also assist 10,233 graduate students annually (University System of Maryland, 2023). As advanced programs can be shorter and more content-focused, an influx of technology-driven advisement opportunities, may be beneficial for further investigate how advisors perceive different aspects of their role influencing the behaviors of learners (Wang & Houdyshell, 2021). Learner perspective transformation is a unique cognitive process that adults undergo as they gain a lifetime of

experience. Therefore, descriptions of interactions between advisor and learner can be used to influence the training and development of academic advisors.

Study Positionality

This qualitative descriptive study aimed to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations. Participants were selected from one state-affiliated public institution in the Middle Atlantic states. Due to variation in advising roles, responsibilities, and institutional structures, selecting one institution allowed the research to focus on advisors' decision making, while excluding potential institutional differences on learner perspective transformation. This study emphasizes at least two years of experience from participant advisors because professionals with this length of tenure have experienced at least two full academic cycles. Within that timeframe, it is also possible for the advisor to have guided a learner through a full graduate-level academic program. Though shorter in duration, graduate programs are rigorous, so completion timelines depend extensively on learner action. To focus this research, transformative learning and perspectives were used as theoretical foundations to investigate how advisors experience influencing the behaviors of different learners. In the scope of this study, learner perspective transformation is the intentional act of an academic advisor interacting with a learner experiencing challenges.

Theoretical Foundations

Personal transformations are the way our bodies adapt to our ever-changing environment; learning is our way of identifying how we have adapted. Throughout their lifespan, a person will develop different learning perspectives, which influences the

decisions they make. Adult learners tend to outperform children in complex perceptual and cognitive processing activities due to enhanced auditory and visual processing capabilities (Roark et al., 2023). Understanding that adult learning is a unique process, researchers in the late 20th century began to identify the ways that this population differed. Between 1970 and 1980, Dr. Malcolm Knowles worked to inspire adult learning theory development (popularized as andragogy) and eventually introduced several assumptions which influence the work of other educational psychologists since (Han & Henschke, 2012). Knowles's contributions to learning theory and the idea that adult learning is a transformative experience are foundational to this research. Into the 1990's, a more dynamic approach to investigating these transformations occurring in adult learning was deemed necessary.

The answer to this need was Jack Mezirow, who was later identified as the father of transformative learning because of his Transformative Learning Theory (TLT). Mezirow (1978) later builds upon this theory by stating that adults engage in many kinds of regular learning transformations, such as how to act, how things work, and what is expected of an individual in different environments. Mezirow's approach to explaining transformative learning supersedes that of Knowles because it accounts for different types of perspective transformations. Mezirow's views on learner perspective transformation were deeply influenced by the positivistic learning theories of Kuhn, Freire, and Habermas (Kitchenham, 2008), then into the 21st century by Taylor, which further acknowledged the significance of cultural awareness (Mezirow, 2003). TLT was selected for the study because since it was developed it has become a commonly accepted model for researching educational phenomena related to adult learning.

Transformative Learning Perspectives

This study identified TLT as an opportunity to identify academic advisor experiences and gain descriptions of how advisors engage with learners to influence their perspective transformations. A transformative approach to advising learners might have benefits, including more accurate identification of learner perspectives and easier facilitation of learner perspective transformations (Howard et al., 2019). Though Mezirow was not the first theorist to discuss transformative aspects of adult learning, he was the first to emphasize the unique processes occurring when someone returns to formal education in later adult life. When learning, adults experience a behavioral change process where they must reformulate what they perceive as valuable and transform how they act in society when they gain new information that conflicts with their prior knowledge (Mezirow, 1978). A transformed learner perspective can occur outside of these advisor-learner relationships because advisors can help learners better manage their individual decision-making processes. An advisor could facilitate a transformation in a learners' perspectives by actively working with them to identify and accept the value of alternative perspectives.

This evolution of TLT has created opportunities for educational researchers to understand learners' perspectives better, establishing the theoretical foundation of this study. Mezirows' transformative learning theory was designed to remain flexible in different educational settings (Lozada & Johnson, 2019; Mezirow, 2003), making it highly transferable across learning environments. Dirkx (1998) contributed learner perspective transformations are best applied to the investigation of changes occurring as adult learners explore new beliefs, values, and assumptions. This information is

internalized (even if faulty), critically reflected upon, and then transformed into a new viewpoint (Dirkx & Mezirow, 2006). In action this means the learner takes in the new information, reflects on what it means as compared to what they already understood about the world, and then transforms their knowledge based on this new meaning perspective. This indicates an advisor can influence the transformation of learners' perspectives by communicating about challenges faced and by helping to plan and accomplish future goals.

TLT shares core values with industry standards of excellence with the advising profession, making it useful foundational theory for gathering descriptions of advisor's experiences. Mbindyo et al. (2021) contributes that the principles of transformational leadership ('idealized influence', 'inspirational motivation', 'intellectual stimulation', and 'individualized consideration') can easily accommodate the NACADA advising core values ('respect', 'integrity', 'empowerment', 'professionalism', 'commitment', 'caring', and 'inclusivity'). This transferability of TLT creates an opportunity for further investigation into how academic practitioners act intentionally to make the most significant potential impact on learners. Literature supports the continued use of transformative approaches to acquire the learning skills necessary to achieve a range of desired academic goals or outcomes (DeAngelis, 2022) including a renewed focus to the promotion of strategic academic outcomes (Coronella, 2018). Individual advisors must establish personal strategies to engage with learners and make meaningful contributions to their learning experiences. To help contribute knowledge regarding how advisors' experience transforming learners' perspectives, the current study sought to understand this phenomenon from the first-person accounts of professionals that have experienced it.

Study Orientations

It is no longer sufficient to advise learners by directing them to self-explore institutional resources when a specialized approach to advisement can be utilized. Mezirow (1978) contributed to the TLT model by observing how adult women reentering the workforce pursue new knowledge by reconciling it with their prior understanding. Though other theorists have contributed research informing our understanding of how adults learn, TLT helps position the research questions in this study by orienting them towards the transformation of learners' general perspectives. In a transformative advising model, there are iterative phases where micro-transformations might take place seamlessly throughout a conversation (Gopaldas et al., 2021). Each of these iterative phases is followed by opportunities for the learner to elaborate on their learning perspectives, a process which the advisor would facilitate by identifying the learners' stated criteria, judgments, and thoughts about their experiences. The advisor may then find it easier to identify alternative options, more precise action planning, or new skills they might use to transform other learners' perspectives.

This study was positioned to identify how advisors describe facilitating learner perspective transformations but excluded direct accounts from the learners' perspective because the focus was the experiences of advisors. Due to the desire to understand how advisors' describe their role and influence on learner decision- making, TLT establishes a theoretical foundation that guides the research questions for this study. By investigating remote academic advisor experiences facilitating graduate-learner perspective transformations at one state-affiliated public institution, this study attempted to extend the body of literature related to TLT applications in higher education. This application may

add to the body of literature available to understand educational phenomena and contribute formative theorization opportunities to our understanding about adult learning and development.

Review of the Literature

This study sought to investigate the phenomenon how remote academic advisors describe facilitating transformations in graduate-level learner perspectives. Alvarado and Olson (2020) contribute that due to infrequent research to-date, more future studies should focus on the professional capabilities and perspectives of institutional advisors. With continued research into advisors' experiences, higher education stakeholders can make informed decisions and invest in systems that enable more meaningful engagement between advisors and learners. Mezirow (1990) contributed adult learning requires making meaning from new experiences and using this developed knowledge to inform future decision-making. As adults experience educational dilemmas that disorient them, the natural inclination may be to follow a generic process to resolve problems (Mezirow, 1978), though more profound issues require significant reassessment. All learning issues are potential opportunities for an advisor to intervene and facilitate a transformation of a learners' perspectives. To understand how advisors experience this phenomenon, this study asked participants about when and how intervene with learners, as well as and how they approach facilitating these transformations.

Discovering Frames of Reference

How a learner thinks about (frames) their experiences when faced with new information may dictate their future decisions (references) about the world. As advisors establish rapport with individual learners, they can better understand their personality

traits and propensity to trust different advisement approaches (Terblanche & Heyns, 2020). The intended outcome of these interactions would be to discover the learners' frames of reference, which involves critically reflecting on the learners' expectations, exploring their disorienting dilemmas, and using this information to define academic success. Academic advisors might intervene with learners to facilitate (or ease) the challenge of identifying and accepting alternative perspectives, as they are met with this new information. The presence of an authoritative figure to monitor and guide transformations (changes) in learner commitment and focus, allows learners to follow a credible pathway to success (Klempin & Karp, 2018). Transformative conversations allow an advisor to extract important details about individual learners' initial expectations of themselves and the learning environment.

Critical Reflection. The value of critical reflection is evidenced in the practices and activities advisors use to examine the needs of different learners. An effective means for promoting knowledge and skill development is helping adult learners gain self-confidence through critically evaluating their academic experiences (Klempin et al., 2021). As an advisor critically reflects on their approaches used to support different learners, they develop assessment skills and strategies which can be used to support future decision-making. Mezirow's transformative learning theory explains that critical reflection promotes transformations of a person's assumptions (Gerster-Bentaya et al., 2022). With additional research the potential applications for transformative learning approaches in academic advisement are likely to increase. The continued application of TLT with different subpopulations has the potential to contextualize better advising and coaching approaches for diverse learner populations (Eastman, 2019). Critical reflection

on the learners' situation helps the advisor determine ideal ways to engage in a rational discourse, helping the learner transform their perspectives toward academic requirements.

Critically analyzing what the learner says as they describe different dilemmas faced in the academic environment allows an advisor to provide the best quality advisement possible. Active reflection on the learners' feelings and perspectives, which impact a person's decision-making capabilities, is essential to assess and capture competitive advantages in a global workforce (Syaharuddin et al., 2022). By engaging in incremental coaching sessions with inexperienced learners, an advisor can help develop skills to critically reflect upon the dilemmas that disorient (cause lack of direction or confusion) the learner. Perspective transformation is a developed skill that requires critical thinking and the ability to internally compare ideal results before acting (Mann, 2018). When given clear goals to achieve between each interaction with their advisor, learners can better self-reflect on what is required at each stage of their program (Cheng et al., 2023; Gerster-Bentaya et al., 2022). Advisors may develop experiential knowledge over time in the role, which informs the decisions they make when guiding a learner facing academic challenges. Regular practice forming critical judgments when faced with different learner dilemmas can helps an advisor estimate a learners' tolerance for acceptance of a transformed learning perspective.

Assumptions and Expectations. Assumptions are formed in a person's mind (their mindset) and establish how the individual assigns meaning to an event or person. A critical component of transformative learning is reliant upon an individual learners' ability to self-reflect on their assumptions (Gerster-Bentaya et al., 2022). Understanding a learners' assumptions can inform an advisor of how they view their responsibilities in the

classroom, allowing for better resource matching. Academic advisors must understand how their interactions with learners may inform their ability to transform individual perspectives related to academic performance (Askar et al., 2021). An example of this might include encouragement of a learner accepting authority figures (i.e. faculty) deserve a greater degree of respect, by relating this role to a professional setting (i.e. manager). People may attribute differing levels of respect across a hierarchical structure of authority figures in their life, but all of these attributes are based on their personally, underlying assumptions. Mezirow emphasized that to become aware of one's assumptions, one must question their own frames of reference and open their mind to other learning perspectives (Jaakkola et al., 2022). In the scope of this study, a transformed perspective could be described a learners' ability to accept something as accurate and valid, without clear evidence (proof) of its existence or validity.

Expectations differ from assumptions as they are formed from a person's strong beliefs about something. The process of advising learners to transform their perspectives relies on accurately identifying how a learners belief system might influence their decision making. Learners seeking to gain leadership knowledge might expect to engage in co-curricular activities that will allow them to demonstrate the skills employers will find desirable (Spratley, 2020), as an example. Understanding the learners frames of reference, enables advisors to understand how they might effectively convey ways for a learner to make connections between the content they are learning and demonstrable skills for their career. Impactful academic advisors regularly work with learners to practice the self-reflection skills needed to effectively disposition their attitudes and shape learning perspectives regarding their competencies (Gerster-Bentaya et al., 2022).

A learner might need to identify their preconceived expectations regarding learning and how they might conflict with new information. However, advisors must also critically self-reflect on their interactions with learners to effectively transform assumptions and expectations when the learner is not seeing this need.

Motivation. While signing up for school is easy, the ability to retain and succeed requires great motivation. Learner motivation decreases when an individual cannot see the value in the work they are completing (Heddy et al., 2021). The feeling that a specific action is inevitable or will happen in the future no matter how the learner acts can result in complacency or avoidance of class responsibilities. An example of this might include the learners' disengagement with peer discussion work, resulting in lower grades. Advisors can motivate a learner in situations like this by discussing the benefits and rationale for peer discussion or ways to streamline the drafting process. Advisors may facilitate a learner's ability to understand and identify logic by demonstrating appropriate learning structures and finding engaging ways to keep the learner motivated to seek out new knowledge (Lowenstein, 2020). Advising the learner towards a perspective transformation could allow the learner to accept non-traditional approaches that match their unique academic, personal, and professional goals. Critically thinking about learners' motivations further allows an advisor to identify potential resources and develop action plans, that the learner alone would be unlikely to discover.

Exploring Disorienting Dilemmas. In graduate programs learners can expect to face disorienting dilemmas as the influx of new information challenges their prior belief and value systems. Each dilemma is unique and with practice an advisor can develop the skills needed to support diverse learners despite what may be disorienting them. As

learners face these dilemmas, how they interpret meaning and their expectations of learning will influence their decision making (Taylor, 1998). By reviewing systemic data and engaging in meaningful discussion regarding their academic experiences, advisors can assess how the dilemma uniquely impacts the individual learner. Understanding a learners' goals is important because this information determines how the learner explores and manages problems they face (DeAngelis, 2022). Advisors can gain this information from a learner through their communications and by seeking out data (using institutional systems) to build a full picture of the dilemma. Throughout this process the advisor seeks to understand how the learner structures meaning and their expectations of the learning process.

Instituting systemic processes to recognize and address the potential challenges, or barriers, learners face is a proactive approach to discovering learners' disorienting dilemmas. Transformative language in advisement conversations help learners focus on the curriculum and models the potential benefits of alternative perspectives, giving the advisor a clear first-person account of how and what to discuss (Lowenstein, 2020). This indicates advisors help learners understand the value of change and effectively self-manage their decisions when faced with change. To transform someone's learning perspectives, advisement staff must be able and willing to dissociate from solely organic relationships and instead seek to form more transformative relationships with adult learners (Mezirow, 1978). By setting aside their generalized dispositions regarding learners and the problems they may face, a transformative advisor can effectively identify the depth of meaning behind their disorienting dilemmas. Using this information, the

advisor can more effectively help the learner establish realistic expectations of the academic environment, for use in the future.

Meaning Structures. Each learner defines meaning for newly gained information by using a personalized internal organization system (a meaning scheme) and unique point of view (meaning perspective). By identifying a learners' meaning schemes, an advisor can more accurately predict the outcomes of a learners' actions. Meaning schemes (i.e., cause-effect relationships) involve a persons' expectations, such as the idea that if something known occurs, something predictable will result (Mezirow, 1990). While some learners prefer not to use a physical tracking systems (such as calendars) to track due dates, this process is a demonstration of how an advisor might acknowledge a learners' meaning scheme (how they track their due dates). While a learner might be successful with one strategy, due to prior experiences the advisor might still attempt to transform the learners' perspectives by relaying the importance understanding time management strategies. An advisor's ability to solve problems for (or with) learners is predicated by how effectively the learner listens and thinks critically through the information presented to them (Mann, 2018). This meaning scheme is an essential building block of advising learner perspective transformations, as a mechanism informing the advisor of how a learner draws meaning from their life.

As a learner navigates new situations, they will develop a unique perspective which further informs how meaning is made for them. Learner meaning perspectives are higher-order mental processes where a person predicts their future experiences by relying on knowledge gained from prior experiences (Lozada & Johnson, 2019). Throughout life human interact with and form relationships with other people allows them to explore

different identities and levels of self-awareness, resulting in their perspective. Individuals cannot return to the past, so they must find a way to gain new learning perspectives as they mature and learn to manage diverse personal and professional relationships (Mezirow, 1978). The learners' ability to recognize and assign value to new meaning-making experiences can impact long-term retention in an academic program. A transformative approach to advising can help learners transform their learning perspectives in proactive and meaningful ways, translating to more engagement with different learning opportunities. By acknowledging and supporting the validity of learners' meaning perspectives, this indicates an advisor can help the learner better conceptualize what they expect from the learning process.

Expectations of learning. An advisor must determine what to discuss with learners and in what order to ask questions or bring up specific topics, particularly if likely to elicit an emotional response. Learners can have deep emotional attachments to their expectations of the learning environment, including what content they are learning and how it is delivered. Keeping adult learners on their paths to academic success takes continual advisor monitoring, as well as effective policies and procedures as needed (Klempin et al., 2021). Using information gained regarding what the learner expects from the learning environment, an advisor can approach their interventions more strategically. If a learner is focused on frustrations with their grade on a writing assignment, the advisor might ask follow-up questions to identify what grade or feedback the learner expected instead. Asking questions allows the learner to provide greater depth of detail and emphasize deeper contextual meaning to describe their experiences. By taking intentional steps to assess the expectations a learner is bringing to the learning

environment, advisors can better understand how to help the learner face disorienting dilemmas later.

Defining Academic Success. Guiding learners to take control of the planning and evaluation aspects of their academic journey requires advisor demonstration of effective milestones and goal setting. Establishing regular milestones may allow less experienced learners to better understand the unique attributes and requirements of their chosen program of study. With sufficient classroom support technologies, learners are given access to the planning and organization resources needed to develop self-efficacy, or confidence in their own abilities (Cheng et al., 2023). As a result of this research, it was determined that with effective support and guidance different learners can achieve intentional academic milestones. Recognizing a learner's level of engagement with their coursework and program of study enables advisors to formulate their responses to match learner goals. Understanding what milestones a learner intends to reach directly informs of when an advisor can intervene to guide the learners' awareness and understanding (Lowenstein, 2020). This knowledge is essential to engaging in learner perspective transformations and can look different based on the advisor-advisee relationship.

How individual learners define success is not necessarily the same as the advisor or institution might define success. Using the advisors' knowledge of a learner's goals can help when emphasizing the rationale for why certain subjects are essential to the learners' long-term academic and professional goals. If their goal is to simply pass a certain course, they have been anxious about, imposing the goal of honors level work is not a fair expectation on that learner. As learners cannot actively control the learning they practice, a greater degree of intuition for the learning process is required, course-over-course.

Learner perspectives must be intermittently supported through interventions from the institution (Syaharuddin et al., 2022). As advisors act as primary contact points for leaners, they play a critical role in relaying the milestones expected for courses or programs. As well, they help learners define what academic success looks like by establishing effective goals to drive their academic efforts.

Demonstrating Milestones. Over time advisors' experience various ways to reach program completion goals, via their interactions with learners and because of their own academic pursuits. The ability to foresee potential pitfalls or academic issues a learner may face in their program is equally important to the advisor and learner. An advisors' insight and ability to sense the underlying psychological conditions impacting a learner is a product of adequate time spent observing oneself in the act of coaching (Bennett, 2022). Additionally, the learned practice of structuring learning goals into manageable activities that an individual can efficiently perform results in further knowledge development (Bermea, 2022). Inquiring further to discover the scope of a learners' needs is foundational to academic advising, as experienced practitioners understand that learning is a complex process. The degree of challenge an advisor faces when interpreting a learners' situation directly impacts their professional capabilities and responsibilities (Troxel, 2019). By developing an intuitive sense of what learners need and how to support them best, advisors can demonstrate the milestones learners must reach to be academically successful long-term.

An enlightened advisor will craft intentional strategies and identify relevant resources to support individual learner needs. As they interact with diverse learner populations and experience alternative learner perspectives as part of this process,

advisors develop insights regarding what learners are experiencing and how this impacts their behaviors and intent to learn (Kent & Rechavi, 2020). Advisors can then use these experiences as reference when supporting future learners, showing the learner that others have achieved success through the recommended actions. When advisors approach their role from a transformative learning perspective, they develop the ability to positively predict a learner's potential academic success (Mbindyo et al., 2021). Using this information, the advisor can also reason the likely pitfalls a learner will face and assess the need for potential interventions. Over time, this practice develops into an intuitive sense that transforms the advisors' perceptions and informs each future interaction with learners (Mann, 2018). As a result of this effort, the advisor becomes more efficient at identifying and communicating needed learner perspective transformations to reach strategic academic goals.

Goal Setting. An advisor may use goal setting to facilitate discussions with learners regarding the perspectives they bring into the learning environment. DREAMS is an acronym that may be applied to the virtual coaching role specifically, indicating "goals [that] are Data-responsive, Relevant, Environment/content-specific, Attainable, Measurable, and Student-focused" help learners achieve their goals more efficiently (Rowland et al., 2023, p. 80). Adult learners thrive when provided with goals that allow them to follow a logical path to program completion, so tools like this provide structural guidance to the goal setting process. After an advisor identifies and examines the different aspects of a virtual learner's long-term goals, they can suggest more informed steps a learner might take. When learners set a career goal, mentoring them on the best path to take produces greater professional discipline, allowing them to be better prepared

for their professional responsibilities post-graduation. Due to the natural occurrence of transformation throughout the program lifecycle, goal setting helps focus the process of transforming a learners' perspectives. As a result of these activities, the learner may have their best opportunity for long-term academic success despite program and life challenges along the way.

Advisors often work with learners over several years, allowing them to influence goal setting to reach more complex, long-term goals. Identifying negative attributes of a learners' academic performance can indicate the likelihood of taking a recommended action (Gue et al., 2021). If a learner is resistant to alternative perspectives, they may not connect with goals their advisor recommends, therefore they are unlikely to make serious efforts to achieve the discussed goal. When working with a student one-on-one, academic advisors are better equipped to identify individual learners' goal-setting and academic performance needs within the scope of a select program (Keenahan et al., 2022). Due to the hands-on nature of this role, advisors can make meaningful connections between the learners' goals and the current frames of reference the learner may be using to interpret their academic environment. Discovering leaners' frames of reference requires critical reflection on their assumptions, expectations, and motivations, exploration of disorienting dilemmas (meaning structures and expectations of learning), and demonstration of academic success via establishing milestones and goal-setting.

Understanding Habits of Mind

No two academic advisors develop the same professional skills and capabilities because all persons experience life uniquely. As humans solve different problems, they develop inherent dispositions (or qualities) such as the ability to mentally process

information or their temperament towards others. These dispositions are called habits of mind and can be used to describe how an individual learner overcomes academic challenges. As an advisor reflects on what each learner is saying, they must also consider the learner's readiness for potential interventions or resources (Mann, 2018). If met with resistances, the advisor must prepare to pivot their suggestions in the moment. Though it can be challenging to meet the needs of all learners, advisors can help individuals overcome barriers and acknowledge the aspects of their perceptions which may pose a challenge to their long-term success (Collins-Warfield & Niewoehner-Green, 2021). Through purposeful communication an advisor can acknowledge alternative learning perspectives that might benefit the learner. Doing so helps the advisor understand how a learners' habits of mind might best be transformed to achieve desired academic goals.

Purposeful Communications. Academic success is gradual and looks different for everyone, therefore advisors must match their communication style and strategies to the needs of individual learners. Inquiring about a learner's habits of mind allows an advisor to identify what potential barriers the learner might face on the path to graduation. Collaborative communication allows a practitioner to reflect on individual learners' motivations and challenges, while continually identifying the potential resources they could benefit from (Beckwith & Beckwith, 2020). Through motivational interviewing advisors can better understand how to help learners experiencing mixed feelings or uncertain how to proceed with an academic challenge. Emotionally intelligent coaches communicate purposefully, emphasizing learners' skills and the systems which may benefit them the most (Ray, 2017). How an advisor communicates with learners

about their habits of mind can have long-lasting academic, personal, and professional impacts on the individual.

Motivational Interviewing. Motivational interviewing helps advisors create an open environment for learners to discuss their needs and concerns. Adult learners sometimes hold back information due to embarrassment about a potential deficiency, fear of the unknown, or a lack of awareness regarding institutional processes (Mann, 2018). Asking the right questions in these moments allows advisors to potentially normalize the question-asking process and develop stronger relationships with individual learners. A motivational interview is a proactive approach to determining learner hesitations, as it utilizes storytelling to describe how a learner feels about their experiences (Hamed Ghanem & Gurumadhva Rao, 2021). Academic advisors can ask strategic questions to motivate learners by using open-ended questions and listening intently to responses for relative information that can be further explored. As part of a motivational interview, questions asked will often root back to the mental habits of the learner and can be used to establish when a learner's perspectives may need to be transformed about something.

When receiving learners' answers during a motivational interview, the advisor may begin mentally prioritizing next steps. Using a motivational interview to engage the learner in self-reflecting on their experiences and academic performance is a holistic approach to advising (Bermea, 2022), which can effectively teach the learner to find their own motivations in the future. In these conversations, the advisor must assess the learners' options and determine what resources the institution may offer to support the learning process. By asking simple, straightforward questions, the advisor can engage a learner in making smaller transformations to their behaviors (Gopaldas et al., 2021).

These more minor, incremental transformations require less effort for learners to address and are more manageable for a remote advisor when supporting a larger population of learners. Probing, open-ended questions to seek out more detailed information on a particular topic improves the advisors' and learners' strategic decision-making capabilities (Gerster-Bentaya et al., 2022). Academic advisors may use motivational interviewing to clarify learners' perspectives and verify the accuracy of their assessments regarding academic circumstances.

Verifying Options. Rationalizing available options for a learner and matching resources for their success is an especially challenging component of transforming learners' perspectives. As the advisor cannot ultimately control a learners' behaviors, they must use short- and long-term reasoning skills to deduce the potential impact of different learner options (Mann, 2018). Reasoning the short-term impacts of a decision, allows an advisor to guide the immediate activities and perceptions of a learner as they focus on less-impactful, incremental changes. It is also important to assess the long-term impacts of learner choices as the related impacts are potentially more long-lasting and meaningful. Academic advisors are critical in promoting learner engagement with available tools and resources but must remain mindful of learner responses. Advisors' guide the actions of learners by informing them of essential processes or policies which may influence to their academic goals (Brdesee & Alsaggaf, 2022). Advisors can purposefully communicate available options for a learner; if they could decide to take a different course of action, that does not help them towards their goals, this may be discussed in advance so alternative options may be considered.

An advisor engaged in transformational conversations to influence learners' actions and thought processes must recognize the importance of the learner's perspectives. Each topic a student brings up to their advisor can change their options for next steps, making the decision-making process more complicated. Additional advising literature explores what influences learners' cognitive and affective outputs may have on improving related decision-making quality (Alvarado and Olson, 2020). Evaluating the general desire or willingness of someone to act is a challenging yet critical component of the advising profession. Exploring how an advisor decides on what options to focus their discussion with learners allows for the description of how advisors experience their profession. When forced into participating in learning activities, it should be noted that adult learners are more likely to resist a coach's intervention attempts (Rowland et al., 2023). With this knowledge, as an advisor continues engaging with a learner, their intuition and perceptions would continually activate new learning pathways. This process results in a learners' habits of mind becoming easier to detect, allowing the advisor to verify which options likely to result in desired learning outcomes.

Discussing Learning Perspectives. Professional advisors recognize understanding a learner's habits of mind requires discussing their different learning perspectives. While a transactional advisement conversation can be effective for simple learner requests, to facilitate complex learner perspective transformations skilled advisors must develop further conversational acumen. The National Academic Advising Association [NACADA] (2017), which establishes standards for the advisement profession emphasizes building rapport with learners is a core relational competency for professional academic advisors. Doing so allows the advisor to establish influence in an

advisee by facilitating conversations that introduce alternative perspectives, even when the subject matter may be difficult to hear or accept. Advisors can practice creating open spaces to investigate individual learners' perspectives and use the information gained to demonstrate the advising environment as a safe space to share vulnerabilities. The primary way advisors' form a connection with adult learners is by helping them overcome challenges, such as conveying active and implied personal support during an academic crisis (Lazarowicz & McGill, 2022). Thoroughly discussing a learners perspective requires first acknowledging the value of new information and diverse perspectives.

Acknowledging New Information. Advisors play a crucial role in helping learners reconcile what they already know with new information they receive. With this information, the advisor attempts to identify what barriers the learner must overcome, and potential resources might be available to support their needs. Every learner will eventually discover that becoming something is a process with many opportunities and challenges but is also always based on some form of structure that can be learned (Suarez & Beatty, 2022). Planning for a successful way to reach a particular goal requires strategically reviewing what the individual learner wants to become in the future, and developing a plan for them to overcome any challenges that arise. To help learners reconcile their learner perspectives with the new information they gain, it is vital to promote the value of seeking external perspectives from peer learners and other institutional staff. Practicing this type of engagement throughout their program helps a learner better manage change and self-regulate their actions when faced with similar circumstances in the future.

Higher education institutions curate and manage effective data tracking systems to make tracing and identifying learner activities easier. Effective advising requires reflection on learners' commitments toward their educational investments. Though, coaching virtual learners also requires a structured yet flexible approach that includes verifying individual learners' perspectives, examining external influences, and optimizing performance resources when possible (Rowland et al., 2023). Systemic reporting allows advisors to identify where learners must alter their learner perspectives to overcome learning barriers and how this process will help them reconcile new information moving forward. Electronic advising technologies, such as knowledge-source databases and chatbot communication systems, address common learner questions more efficiently (Alkhoori et al., 2020), freeing more time for advisors to interact with learners experiencing more complex academic issues. Learning analytics and record-keeping are primary examples of how advisors use institutional data to reconcile information, while identifying underlying needs and creating meaningful, timely interventions.

Perspective Diversity. Humans tend to focus on their smaller community first, but advisors must remain aware that learners attend from global locations. Additional consideration must be made for how learning institutions support the unique needs of different disadvantaged learners (Rowland et al., 2023). Retaining a culturally engaged academic advising environment that recognizes the value of diversity, naturally trains learners to adapt to modern workforce expectations (Museus, 2021). Disparities in the type, frequency, and accessibility of resources provided to learners with specialized needs can significantly impact their capacity to reconcile new information. Non-marginalized populations, such as young Caucasian learners, are more likely to complete a college

degree in the United States due to systemic challenges impacting marginalized student groups (Museus, 2021). These underserved populations face unique challenges in pursuing higher education, resulting in inequitable access to some personal and professional opportunities. Awareness of different cultural influences on a learner can impact how advisors interact with them and the degree of learner perspective transformation a person can achieve.

Cultural awareness is more complex than any one standard or process can manage. For advisors to impact different learners meaningfully, they must be aware of perspective diversity. When curriculum is supported by culturally relevant content, the impact tends to be transformative for marginalized populations of learners (Museus, 2021; Suarez & Beatty, 2022). This literature highlights the internalized cultural pressures advisors might face and emphasizes how learner's mental habits influence their perceptions. An experienced advisor grows to understand that different learner groups may experience unique challenges and bring different learning perspectives to the academic environment. With the return of servicemembers from World War II, the first iteration of the GI Bill was introduced to provide veterans with substantial education benefits (Hamed Ghanem & Gurumadhva Rao, 2021). This tuition assistance program substantially increased enrollment in higher education programs and emphasized the importance of continued education for diverse populations of adults transitioning to secondary professions. Understanding the unique cultural influences impacting different learners is critical to developing well-rounded advising skills and effectively facilitating learners' acceptance of alternative perspectives.

Acknowledging Validity in Alternative Perspectives. People can transform their learning perspectives only after assessing and recognizing alternative habits of mind. Mental habits (dispositions) will guide learners' decision-making, influencing their receptiveness to advisement. An advisors' belief that they can significantly influence learners and that their advice will have transformative qualities is the product of employing a strategic conversational plan. A learners' competence in acquiring new knowledge is developed through experiences that challenge their pre-existing beliefs and allow them to self-reflect (Jaakkola et al., 2022). A skilled advisor will adjust their approach and conversational strategies to transform the belief system of individual learners. The process involves iteratively discussing the learner's experiences and nurturing their ability to make small, frequent transformations in their thinking, then allowing them to practice this skill with reinforcement from the advisor, leading to an increased sense of belief in oneself (Gopaldas et al., 2021). Necessary aspects to acknowledging the validity of alternative perspectives are the ethical and moral implications, as well as the philosophical and psychological aspects of learning.

Ethics and Morals. An advisor can best identify and interpret how to transform individual learner perspectives through learners' explorations of their ethical and moral beliefs. These habits of mind include a persons' perceptions of what is correct for the learning environment versus what constitutes wrong behavior. As learners engage with course content and their peers, they learn to accurately evaluate the actions and activities of others. While the need for self-regulation in learning is undeniable, it benefits those in the virtual learning space to have set goals that they can use to practice regulating their behaviors (Cheng et al., 2023). A persons' ability to self-regulate their emotions results in

the standards they uphold and how they construct moral judgments. While grades and taking term(s) off from attendance can indicate academic struggles, the experienced academic advisor understands the ethical administration of their job sometimes means guiding a learner to step away from their program or towards another institution that may better serve their long-term academic needs (Troxel et al., 2021). The emphasis on quality ethical and moral standards is paramount to advising literature and influences learner perspective transformations, though philosophical and psychological implications are also important to note.

Philosophical/Psychological. The advisor and the learner come with set philosophical and psychological implications that may impact their relationship. For the learner to accept advisement directing them to accept alternative perspectives, they must be open to change and trust their advisor. Learner perspective transformation allows adult learners to be critically aware of the cultural and psychological conventions influencing life (Mezirow, 1978). Advisement staff may share their personal experiences with a learner to help influence their decisions, but they cannot force a particular learner into action. The learners' perspectives regarding academic challenges indicate how that learner is likely to manage their knowledge and understand the reality of academic situations (Klempin et al., 2021). Literature supports that using a positive tone in conversations, to nurture micro-transformations in their thinking, leads to greater psychological freedom (Gopaldas et al., 2021; Terblanche & Heyns, 2020). Fundamental knowledge of reality and existence is constantly being impacted by the cognitive processes in the human brain and the emotional responses used to manage stressors. The conditions that lead learners to experience psychological distress and grievances with the

institution, stem from issues that could be well addressed through a collaborative relationship with an advisor.

When interacting with a learner regarding the areas of their academics that are valued as important and worth the time spent learning, an advisor would take note of this information for leverage in later conversations about academic areas. Having strategic knowledge about a learner's unique mental habits towards different subject matter may be helpful for an advisor responsible for helping ensure that learners' long-term academic progress. Along with cognitive factors, a persons' emotional state reflects their biases, preconceptions, and ability to engage with others (Esmail & Matthews-Roper, 2022). Understanding how deeply connected a human beings' cognitive functioning is with their emotional state is influential on the development of coaching strategies. Advisors will develop insight for learner struggles and become adept at self-regulating their habits to avoid potential issues along their academic journey (Bennett, 2022). Academic advisement plays a critical role in assessing learner habits of mind but is even more influential in helping learners acknowledge alternative perspectives related to the academic journey.

Clarifying Points of View

No two problems are truly the same, especially when it comes to the academic environment. Therefore, as advisors develop the interpersonal communication skills to engage with and motivate diverse learner groups, they must ensure to continually clarify individual viewpoints of learners. Failure to recognize the unique strategies and characteristics of learners' perspectives will result in a growing disparity in higher education settings (McGill, 2018). Advisors may check-in with learners to clarify the

meaning behind their statements, after they verify what details are important to the learners' situation. Clarify the learners' viewpoints also allows the learner to hear their own words rephrased back to them and opens the opportunity to add detail or verify meaning. Academic leaders can promote effective transformations in learner perspectives by "setting high expectations, creating measurable goals, encouraging self-management, openly sharing information and knowledge, and intrinsic motivation" (Mbindyo et al., 2021, p. 173). As they communicate with individual learners, advisors can use different conversational strategies to help the learner plan for success and validate the transformations taking place.

Planning for Success. Creating a plan with learners for their academic success is a significant part of a transformative approach to academic advising. At times, academic advisors must teach a learner that success means attaining minor victories, rather than having them focus on the eventual goal of graduation or getting hired for a desired position. Organizing a plan to be successful is a learned behavior, which many adults require closer guidance to fully master (Burks, 2022). Understanding the learning objectives of each assignment and course can help advisors facilitate individual learners' abilities to reframe their perspectives regarding the purpose of their academic efforts. Forming interdependent relationships within learner peer groups allows an individual to appreciate the value of alternative (or multiple) learner perspectives (Baxter Magolda, 2003). As advisors discuss ideal actions for the learner to take, they effectively teach the learner how to better plan for success, which can have a direct impact on academic performance. To help a learner overcome their academic barriers, an advisor may provide

feedback or share their personal perspectives as a means for helping instill accountability to the academic environment.

Providing Feedback. Students who have never graduated from a college program, do not fully understand what it is like to accomplish this goal. Academic advisement and skills coaching allow the practitioner to guide the learner by conceptualizing what efforts, practices, and activities are needed of them to earn a degree. Through this experience, learners manage to separate their emotions from their cognitive processes, and recognize potential biases, which may be hindering their ability to succeed (Ray, 2017). Advising learners on course requirements (i.e., due dates, planning options for projects, and verifying access to assignment rubrics) can make it easier for the learner to recall of these resources when needed in the future. Conversely, failure to submit assignments or extended absences from the classroom leads to decreased openness to learner perspective transformation (Gue et al., 2021). As advisors are primarily responsible for demonstrating what it takes to become a successful college graduate, they must find the most efficient way of providing feedback regarding how individual learners might transform their learner perspectives to overcome academic challenges.

Advisors sometimes must relay disappointing news or interact with learners frustrated by their educational circumstances. When relaying potentially disappointing information to a learner, an influential academic advisor may utilize strategies to convey the information in a way that minimizes concern (Menke et al., 2020). Supporting negative feedback with system data can demonstrate more clearly what issue(s) the learner must address. Helping a learner proactively process negative feedback they receive profoundly impacts the learners' ability to accept similar feedback in the future.

A learner who receives clear communication regarding academic expectations will be more likely to seek out help before due dates and will have a deeper understanding of the potential impact of their academic efforts (Liu & Ammigan, 2021). By normalizing the feedback process, advisors teach learners how to disarm their natural inclinations to resist change or to assume the worst when anticipating instructor feedback. Advisor feedback is an essential component in clarifying the points of view guiding learners' decisions, especially during the process of transforming their learning perspectives.

Accountability and Validation. While providing validation is essential, this must balance with the ability to hold learners accountable to decisions they make when attempting to overcome challenges. Advisors are accountable to the learners they interact with, to help them identify their intrinsic motivations and better understand their learning experiences (Troxel, 2019). By identifying for learners how strategic connections can be made between their course content and professional experiences, an advisor can co-create solutions that allow the learner to immediately demonstrate their learning. Facilitating a clear understanding of a learners' expectations in virtual learning environments instills trust in the advisor-learner relationship (Liu & Ammigan, 2021). Transformative advising emphasizes validating a learners experience and acknowledging the potential impact of the concerns a learner expresses (Coronella, 2018). Professional academic advisors can use questioning strategies to validate information learners are sharing and hold individuals accountable to expectations in the academic environment.

Advisors can help learners clarify their perspectives by demonstrating what it means to be accountable and how to validate information as it is being received. Accountability is demonstrated by keeping commitments to learners, being available and

supportive of their needs, as well as by providing impactful resources in these moments. An advisor can further demonstrate a learners' thoughts and feelings are valid by using a positive tone of voice and encouraging words. Having a positive regard for different alternative values, beliefs, knowledge, and experiences shows learners how to demonstrate trust in themselves and overpower negative self-talk (Bermea, 2022). When interacting with different learners, the advisors' emotional state can transfer onto a learner, even negative emotions (Mbindyo et al., 2021). Avoiding negativity and embracing an optimistic perspective of alternative perspectives can help the learner establish matched resilience. By helping individual learners outwardly clarify their points of view, skilled advisors teach learners how to develop accountable, valid study skills long-term.

Validating Learner Transformations. The core contribution of facilitating transformations in learner perspectives is the validation of alternative learning perspectives. Advisement helps learners reconcile their perceptions of learning by relating academic content to other life goals (Klempin et al., 2021). Adult learners have unique advising needs, so periodic check-ins to confirm what a learner is feeling can help during the process of managing learner perspective transformations (Gopaldas et al., 2021). Regular communication with learners enables remote academic advisors to accurately identify when interventions are needed and encourages learners to be more receptive to advisement. Purposeful advisors can also use their knowledge regarding resources, ability to reason complex situations, and interpersonal communication skills to de-escalate distressed students (Mann, 2018). This action shows positive regard for the learner and their experiences, making it the best way to emotionally disarm learners as

they discuss potentially topics. By helping a learner clarify their understanding of what outcomes to expect from their academic efforts, the advisor may effectively transfer their (and other external) perspectives to the learner.

Evaluating the learner's emotional investment and gathering all necessary data to make informed decisions regarding their engagement in the virtual classroom, creates the opportunity to form stronger advisor-learner relationships. Learners tend to default to convergent thinking (melding multiple ideas together) or divergent thinking (branches of ideas), but with guidance they can be taught to integrate a more transformative learning perspective (El Sayary, 2021). In action, the advisor might validate the transformations occurring in a learners' perspectives by calling attention to milestones attained or goals the learner has reached. Advising is a collaborative effort in which the advisor facilitates a thoughtful review of the learners' goals and uses this information to help a learner make informed decisions about their academic options (Nachouki & Naaj, 2019). By making intentional efforts to validate the transformations occurring in a learner's perspectives, the advisor normalizes the process of clarifying one's own viewpoints.

Emotional Intelligence. The ability to put aside emotional attachments to objectively review a learners' perspective is developed over time. Emotional intelligence is an interpersonal communication skill which helps people understand their circumstances. It can be detrimental for the advisor to avoid processing and regulating their own emotions, as this could prevent them from accurately acknowledging emotional reactions in others. Learners experiencing mental health strains such as stress, anxiety, and low self-esteem may turn to advisors for personal counseling in addition to academic needs (Abrams, 2022). Over time, the repetitive strain of engaging empathetically with

learners as they experience these events can lead to compassion fatigue. In the helping professions, a negative side-effect of supporting other people is compassion fatigue, characterized by emotional and physical exhaustion, leading to a diminished ability to empathize or feel compassion for others (Sak et al., 2023). Emotional intelligence skills allow an advisor to acknowledge and diminish the negative side effects of coaching learners.

Managing one's feelings helps promote rationality and facilitates a quicker transformation of learner perspectives. Rational discourse with an advisor instills the expectations that learners will receive valuable information and alternative options for challenges when they communicate. When clarifying the learners' points of view, an advisor demonstrates that they will provide a supportive and caring degree of service when needed in the future as well. Advisors that are empathetic to learners are more relatable and considered to be more supportive, which is empowering for adult learners (Troxel & Kyei-Blankson, 2020). Transferring the advisors' rationality (in thought and action) to the learner is also a progressive process. The advisor acts as a coach in this capacity, teaching the learner how to develop the insight to guide their learning and professional goal setting over time (Bennett, 2022). Empathy and emotional care are deeply impactful forms of social support that academic advisors utilize to make more meaningful connections with learners. Practicing an emotionally intelligent approach to communicating allows advisors to recognize and validate learners' progress toward necessary academic perspective transformations.

Making Decisions. An advisor cannot make decisions for learners, but they can reflect on and guide the decisions learners make. This reflection process allows the

advisor to process their thoughts and determine the steps the learner needs to transform their perspectives regarding academic circumstances. Advisors have a great deal of autonomy related to their daily decision-making, though they are guided by general principles outlined by institutions (McGill, 2019). Deciding the actions a learner may need to take will be situational and should remain flexible to match changing learner needs. By discussing the pathways an advisor feels the learner should take, a conversation engages the learner in identifying their options and making informed decisions. Using a transparent and manageable goal-setting system in virtual and hybrid learning environments is essential for learners to self-regulate and direct their actions (Cheng et al., 2023). This experience ensures that the developing learner can reason the best possible academic outcomes, guided by the knowledge and experience of a skilled advisor.

Learners may expect to have access to resources and support systems to help them along their academic journey. It is the basic expectation that an advisor supports a learner with timely and accurate information about the situations they face on their academic journey (Troxel et al., 2021). Academic coaches should follow up with individual learners regarding any action plans they help the learner develop, as progress is just as important (if not more important) to the successful outcomes of a program (Sepulveda, 2017). Action planning is successful in transformative conversations because it allows learners to understand how to identify and self-nurture their learning through incremental behavior transformations (Gopaldas et al., 2021). The decision-making capabilities learners can gain from adopting alternative points of view may have indelible impacts on them in the long-term. How advisors decide to engage learners in discussing their

perspectives has a validating impact on the learners' willingness to grow academically and professionally.

Transformed Learning Perspectives

With a transformed learning perspective graduate students can overcome complex academic and professional challenges. Applying transformation-focused coaching strategies to the academic advising profession and encourage more learners to recognize the value in seeking out alternative perspectives when solving a problem. The positive outcomes associated with intentionally transforming learners' perspectives have been noted throughout research in the past few decades, indicating this practice instills learner reasoning, self-reflection, and problem-solving capabilities (Nichols et al., 2020). As the advising profession continues to demonstrate its value and fight for scholarly recognition, the depth of knowledge and pathways and strategies employed to manage learning, must continue to adapt as well. The presence of a transformational theory of advising has allowed the profession to move away from purely transactional communications, enabling more consistent collaboration with learners to solve real-world problems (McGill, 2018). Acknowledgment of a transformative approach to advising can enable a practitioner to focus their interactions with learners on their unique areas of opportunity. As advisors successfully facilitate transformations in learners' perspectives, they learn from each experience, transforming their own advisement perceptions as a result.

Straightforward-Profound Transformations. While transforming a learners' perspectives is the desired outcome, how an advisor facilitates these transformations is of central importance to this research. Some learner perspective transformations can be simple and straightforward resulting in quick adjustments to a learners' performance or

behaviors. Recognizing the conditions that lead to learner attrition and declining grades allows an experienced advisor to intervene more quickly and with appropriate resources. Demonstrating appropriate concern and care for a learner is simple when an advisor practices relational competencies such as effective communication, rapport building, and making meaning (Bermea, 2022). Some challenges require more profound transformations in the learners' perspectives, which might require several conversations over time. Flourishing human beings experience profound learning transformations throughout their lives, in which they deform, reform, and transform their perspectives (Kroth et al., 2022). After some time practicing how to manage deadlines efficiently, the learner can break bad procrastination habits, which may have otherwise led to late assignment submission and more profound long-term impacts. Learner perspective transformations are not a one-size-fits-all remedy to improve academic performance but are a significant component of the advisement profession.

Improved Academic Performance. An idealized outcome of learners' transformed perspectives is improved academic performance. Facilitating learner perspective transformation is critical to adult education research (Mezirow, 1978). As learners develop the skills and knowledge to effectively engage in the activities that will lead to improved academic performance, the advisor acts as their coach and guide. A collaborative relationship between the advisor and learner may be most effective, where the advisor acts as a leader for transformative change, and the learner willfully identifies a clear path for improvement or continued success (Eastman, 2019). By guiding a learners' actions through strategic conversations and timely interventions, the transformations an advisor helps facilitate in learners' perspectives can have deep and

meaningful impacts on both parties. Increased pressure has been placed on institutions to reduce the costs to learners and improve the outcomes associated with their membership (Hallett, 2021). Competence with new skills or knowledge is a desirable outcome of the learning process but requires iteratively transforming learner perspectives to reconcile new information as it is received.

When learners respond more frequently to advisor outreach attempts, learners may also engage more in coursework, and the quality of their communications with peers may increase. Intentionally responding to learner challenges with development opportunities can be more effective for advisor skill development than formal training (Tee et al., 2019). A learner accepts what is needed to reach academic success after accepting that alternative perspectives are sometimes necessary. Advisors can help facilitate transformations in learners' perspectives, by helping them see the paths they might follow to resolve an issue or reach a goal. Learner responsiveness to the need for a learner perspective transformation will allow them to interpret their academic circumstances better and make strategic decisions supporting their academic performance needs long-term. Advisors should use their interactions with learners to create a safe space for them to share their experiences and overcome resistances that may inhibit their long-term academic and professional success (Askar et al., 2021). Retaining holistic knowledge of curriculum, programs, policies/procedures, and academic best practices is critical to having the right resources to match the learner.

Confidence and Capabilities. Advisors may help learners build confidence by guiding them identify positive attributes and feel satisfied with their work. The advisors' goal is to transform the learners' perspectives using constructive means of demonstrating

positive morale and professionalism. When learners lack confidence in accepting alternative learner perspectives, the advisor must step in to help identify and promote the potential validity of the alternative pathway. Empowering academic advisors to explore their academic identity and use what they learn to build trust with learners results in a more confident learner. This experience helps build trust in the advisor-advisee relationship (Eastman, 2019), empowering their communications with adult learners to affirm their confidence regarding different aspects of the learning process (Bermea, 2022). An advisors' sense of personal responsibility for the successes of learners they support, can be alleviated by a learner gaining more confidence in the academic environment and expectations. Continually exploring different perspectives on their own leads to learners developing critical self-reflection skills to promote learner perspective transformations in others.

Learner capabilities are subjective to the topic being explored. However, advisement aims to help learners identify their unique capabilities as they better prepare for their career paths. The learner may then grow capable of independently matching new curriculum to their career goals and can identify how the knowledge and skills they gain would apply to their current or future profession (Cheng et al., 2023; Klempin et al., 2021). The willful engagement in virtual discussions by participating with peers also allows the learner to think critically about alternative learning perspectives. It also enables the advisor to identify more meaning-making activities that allow learners to transfer into the role of information disseminators. With the introduction of innovative technologies, it became possible to learn virtually, allowing human beings to exchange knowledge (Callaghan, 2022) and develop new skills that enable a person to demonstrate

the true extent of their capabilities (Jaakkola et al., 2022). Any transformation of a learner's capabilities can allow them to engage with new learning opportunities more efficiently. Learner responsiveness results from improving multiple academic capabilities may result in the learner adequately transforming their perspectives.

Advisor Transformation. The ability to demonstrate an expert degree of reasoning when communicating with learners is a personal transformation the advisor might expect. While the advisor is not an expert on all aspects of the academic experience, they are expected to address a diverse range of perspectives related to learners' unique academic experiences. Professional advisor competencies are demonstrated as expert-level reasoning about what constitutes academic quality (Mann, 2018). The intent of an advisor's reflections on their interactions with learners should lead to transformations in their personal thoughts and feelings about the academic environment (Rowland et al., 2023). Recognizing when and how to act differently in future interactions will result in greater self-reflection, learner resilience toward self-resolving conflicts, and identifying the value of transforming personal learner perspectives. As advisor self-reflects on their interactions, they should identify how they humanized themselves to the learner, whether they were proactive, and if they achieved holistic coverage of the learners' needs (Museus, 2021). The result of advisors' transformed learning perspectives is evidenced by their acceptance of the decisions a learner makes and their willingness to transform their own perspectives as new information is collected.

Accepting Learner Perspective Transformations. Knowledge is acquired through experience, and advisors gain it most by guiding individual learners to understand the

value of learning something new. As part of this process, a certain degree of variability exists in what type of transformation will result from an advisors' intentions to intervene with a learner. Academic advisors are primarily responsible for facilitating learners' understanding of academic policies and programs, which results in matching curriculum to career and personal goals (Troxel et al., 2021). While simply relaying policies from the institutional directory may serve a basic, prescriptive need for the learner, guiding the learner to understand how this knowledge pertains to them directly better demonstrates the advisors' experience and knowledge. Rather than a singular experience, transformative conversations are a process in which the learner incrementally gains the knowledge, confidence, and skills to self-monitor their own perspective transformations (Gopaldas et al., 2021; McGill, 2018). Advisors must accept the results of their attempts to transform learners' perspectives, so long as the outcomes are desirable and promote the learners' goals.

Critical self-reflection. The iterative process of advising learners and reflecting on the experience gives advisors opportunities for personal transformation due to the frequency of new experiences. Advisors must reconcile their cognitive abilities with their potential as human beings to adequately reflect on the meaning and value of their advising experiences in interactions with learners (Ray, 2017). Subjectively reframing information is a self-reflective practice that allows those experiencing anxiety regarding a learners' perspective to reframe the problem critically through incremental learning activities. While elements of the advisors' engagement with the learner can help them demonstrate self-reflection on how the learner responds to (acts upon), the advisor's observations are also significant (Esmail & Matthews-Roper, 2022). Additionally, critical

self-reflection can promote more effective systemic practices and innovations in training for adult learners (Gerster-Bentaya et al., 2022). Reflective coaching plays a critical role in facilitating a learners' perspective transformations by engaging the learner in self-discovery of the events that have transpired and perceptions of their new learner perspectives. As a result of facilitating learner perspective transformations, an advisor can also expect to transform their own perspectives.

Problem Statement

This study seeks to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations. Higher education institutions primarily rely on academic support staff to facilitate learner retention and achievement of long-term academic goals (Museus, 2021). Professional advisors gain experiential knowledge from each interaction with learners, allowing them to develop skills and insight to better orient learners' conduct and actions towards strategic performance outcomes. Though research confirms a link between academic advisors' utilization of a transformative approach to advising and learner outcomes, more research is needed to describe this experience (Mbindyo et al., 2021). Through continued investigation of academic advisors' experiences, institutions can better assess potential services or resources for advisors to support learners. This section outlines how this research identified the phenomenon of interest and describes the population of interest.

To address the phenomenon of how advisors describe facilitating learner perspective transformation, all advisors at one institution in the Middle Atlantic states are part of the participant sample. The identified institution manages a population of approximately 180-200 success coaches (A. McPartland, personal communication, May

7, 2023) spread across 12 teams with variable skill, tenure, and subject-matter expertise (B. Allen, personal communication, May 17, 2023). Participants that have not advised graduate-level learners at any academic institution for at least two years were excluded from participation. This exclusion criteria were integrated to ensure participant responses are founded on sufficient professional knowledge of a full academic year. Departmental leadership at the institution of interest expressed support for this research, with the added request that all leadership teams be represented in the data as possible. All staff within the institutions' Office of Student Success were included within the recruitment scope, to allow for diverse total perspectives for this study.

Statement of the Problem

How remote academic advisors describe facilitating graduate-level learner perspective transformations at one state-affiliated public institution in the Middle Atlantic United States is unknown. Academic advisors' primary skills, knowledge, and responsibilities are evolving, creating the opportunity for rich descriptive research to better explain the nuances this profession (McGill, 2019). The activities involved in academic advisement, including the skills and knowledge most effective at different aspects of the role are notable for each individual practitioner to study. Understanding how these advisement professionals go about supporting learners will provide further insight that can inform further development of this profession (Tee et al., 2019). This study seeks to collect qualitative descriptive data from interviews and questionnaires to determine how the identified participant population describes their experiences transforming the perspectives of learners.

Institutions can review research describing the experiences of their advisement staff to identify potential barriers or trends which need monitoring. Using this information, advisors can also meaningfully engage with individual learners to determine when they may benefit from reviewing alternative perspectives to a situation or problem. Further research to better understand how advisors communicate is vital to the future development of normative theories for advisement practice (Wei, 2022). With additional data to describe how advisors experience different aspects of the occupation, researchers can identify what common themes arise. Additionally, this research can help identify the information other research has contributed about the ways advisors influence learner perception regarding retention and persistence (Tippetts et al., 2022). What is not clearly understood is how the experiences of advisors intervening with learners to overcome individual academic challenges. This study seeks to identify the transformative aspect of this advisement process, by seeking advisors' descriptions of facilitating learner perspective transformations.

Summary

It is unknown how remote academic advisement professionals describe facilitating graduate-level learner perspective transformations. This research seeks to understand this phenomenon from the shared perspective of one state-affiliated public institution in the Middle Atlantic states because doing so provides a concise cross-section of the advisement population for this qualitative descriptive study. Though the advisor has no direct control over actions a learner performs, they have a shared responsibility in the academic outcomes. Advisors can use conversational strategies to help guide the learners' actions, such as reflection (on circumstances) and redirection (to promote

proactive thinking). Before interacting with learners, developing advisors have reported greater incidences of nervousness but also an increased sense of responsibility (Tee et al., 2019). This research indicates a correlation between advisor concern and the degree of responsibility the advisor feels for a learner. As there is no one-size-fits-all solution to all learners' needs, but continued research can provide clarity for the ways that advisors promote learning outcomes, address knowledge barriers, and help individual leaners define and achieve academic success.

Additional innovations in higher education have made it possible to better connect learners with institutional staff and resources, creating a demand for more literature to understand the functionality of advisement at different institutions. As well, online graduate-level program enrollment continues to steadily increase annually (Meyer et al., 2022) indicating further research to understand the scope of this occupation is warranted. With an increase in flexible communications technologies, the methods that advisors and learners interact, and effectiveness of different advisement strategies they attempt can be evaluated to better understand the qualities of these experiences. Due to shifting learner perspectives and the complexity of communicating virtually, advanced research is recommended to help us understand the dynamics of facilitating learner perspective transformations in remote learning environments (Esmail & Matthews-Roper, 2022). At the institution of interest, an open booking advisement model allows learners to schedule phone or virtual (via Zoom) meetings with an advisor throughout the year (B. Allen, personal communication, May 17, 2023). This is significant because when conducting virtual academic coaching, the need for innovative technologies to ensure proper

facilitation of the role increases. The prominence of remote advisement work demands further exploration at the identified institution in the Middle Atlantic states.

The needs of diverse learner populations should be considered when creating policies that govern advisement practices within an academic institution. Learners who have been disadvantaged in their early educational years may find an even more significant challenge with the demands of higher education (Hallett, 2021). The activities and strategies advisors use to facilitate academic conversations with learners impact the availability and accuracy of different institutional resources. Advisors can facilitate a learners' perspective transformations by cultivating early plans to provide immediate resolution, fully confronting the learners' issues, and developing a central plan around the learners' motivation to reach their goals (Bermea, 2022). At the graduate level, this requires a higher order of thinking and practical application, requiring advisors to approach learner perspective transformations more strategically. Transformative approaches to advising will produce far greater opportunities for learners to make deep, meaningful connections with the content of their courses (Lowenstein, 2020). The pursuit of knowledge is action-oriented, as is the act of transforming a learners' perspectives about something in their life. To better understand what advisors experience when intervening with learners in the act of transforming their learning perspectives, this research was necessary.

Chapter 3: Methodology

Introduction

It was not known now remote academic advisors describe facilitating graduate-level learner perspective transformations. Academic advising has only existed in its modern form for a short time, indicating there exists space for research to clarify and substantiate the decisions made by these professionals (McGill, 2019). Combating challenges advisors commonly face when interacting with learners may benefit the learner as much as the advisor. Meaning-making comes from a humanistic perspective of advising, which says that providing support to a learner requires acknowledging their individual strengths (Bermea, 2022). As advisors build rapport with individual learners, they develop an understanding of who that person is, which can be leveraged by the advisor as part of their communication strategies when interacting with future learners. Supportive advisors build a strong rapport with their learners, which allows the advisor to guide the learner through complex unknown situations more effectively (Troxel & Kyei-Blankson, 2020). How this study is positioned to collect advisor descriptions of what it is like to intervene with learners and help them transform their learning perspectives, as outlined throughout this chapter.

With experience, academic advisors can develop the recognition skills to identify behavioral changes in learners such as disengagement from curriculum or frustration with an academic situation. Early interventions to address these behavioral changes can manage problems before they interfere with a learners' ability to persist. Advising and coaching graduate-level learners is a process that takes time, as coaching interactions will typically involve elements of advising, but advising does not necessarily require a

coaching approach (Meyer et al., 2022). Understanding how academic advisors assess the behaviors of graduate-level learners (including the data and systems they reference) is foundational to deciding if a learners' perspectives may need to change about something. The study of graduate-learner support services is of particular importance for future research due to significant literary underrepresentation to date (Meyer et al., 2022). Additionally, it is important for the study of advisors' experiences to acknowledge learner outcomes cannot be guaranteed by the advisor. Therefore, this study further focused on how academic advisors describe what it is like to transform a learners' perspectives at something impacting their academic progress.

This research seeks to understand the experiences of advisors from their own descriptive accounts and subjective reflections. To guide this study, the primary research question asks how academic advisors describe the activities involved in and strategies used to facilitate graduate-level learner perspective transformations. Semi-structured interviews and open-ended questionnaires were collected to better understand the activities involve in and strategies used to facilitate learners' perspective transformations. Additionally, these data sources allowed participants to holistically describe prior experiences where they have facilitated learner perspective transformations prior. Using a reflexive thematic analysis approach (adapted from Braun and Clarke), the data was then individually coded and then synthesized for theme identification. Advisors facilitate conversations with different learner groups, to help them make the best decisions for their long-term academic success. This qualitative descriptive study was used to better understand how remote academic advisors experience transforming learners' perspectives as part of their professional responsibilities.

Purpose of the Study

This qualitative descriptive study aims to understand how remote academic advisors experience facilitating graduate-level learner perspective transformations at one state-affiliated public institution in the Middle Atlantic states. Demand for skilled remote academic advisors has grown significantly in the past few years, resulting in a greater need for literature to understand the operational activities and strategies related to this occupation (Wang & Houdyshell, 2021). Understanding the experiences of advisement staff informs various aspects of the advisor-advisee relationship, including potential outcomes from strategic interventions. Effective facilitation of adult learning requires understanding the true nature of a person's experiences (Mezirow, 1978). While individual learners are ultimately responsible for their own actions, academic advisors can encourage a learner to explore different perspective transformations. As an advisor interacts with different learners and reviews systemic data to evaluate their behaviors, they can stimulate (or facilitate) future desirable learner behaviors. The purpose of this research is to holistically understand what occurs when the target advisor population engages with and makes efforts to influence the perspective transformations of different graduate-level learners.

To explore this phenomenon, the data collected will focus on how advisors describe their past experiences interacting with learners. There has been much argument in higher education regarding what institutional advisors' do for the learner and/or institution, as well as the best strategies to address diverse learning needs (Baldwin et al., 2020). To gain descriptions of what advisors feel, see, and generally experience when engaging with learners requires a qualitative descriptive methodology. Semi-structured

interviews (12-15) and open-ended questionnaires (18-20) were collected from remote academic advisors who have experienced this phenomenon. Interviews are an effective data source to gain thoughts and feelings regarding a phenomenon (Siedlecki, 2022), while questionnaires are effective for facilitating detailed descriptions of participant experiences (Braun & Clarke, 2021). This study was positioned to gather both data sources and synthesize the descriptions provided in both, using reflexive thematic analysis. The codes that emerged from this process were assessed for relevant themes and this information was then detailed out in a formal report.

The purpose of the current study is to gain an understanding of what academic advisors supporting graduate-level learners experience, as they facilitate transformations in the learners' perspectives. A transformative approach to learning translates to deep, long-lasting changes in the advisee's perspectives and worldview (Terblanche, 2022). How an advisor feels and what they think about when advising learners is all part of the process to facilitate learners' perspective transformations. More research attention was needed from the perspective of diverse institutional personnel (such as advisors' and coaches), to understand the aspects of learner support that are most effective (Hall & Liva, 2021). To increase related research knowledge, this study sought to understand how advisors describe the strategies that have been effective for them, in addition to challenges they might have faced. With this information, the themes generated would provide context for what aspects of this experience are most significant for the target advisor population.

Phenomenon and Research Questions

How a target population of remote academic advisors describes their experiences facilitating graduate-level learner perspective transformations is unknown. To better understand the phenomenon of how advisors describe their experiences facilitating a transformation in learner perspectives, this study focuses on the different activities involved and when most appropriate to use them. The primary question guiding this research is how advisors holistically describe their experiences attempting to catalyze a change in learner perspectives about something. While the central research question denotes the purpose of a study, sub-questions contribute probative support so researchers can adequately investigate phenomena (Billups, 2021). Therefore, how remote advisors decide to transform learners' perspectives and the activities involved in facilitating such transformations are important research sub-questions. Following pre-established standards for conducting qualitative data collection helps operationalize the research process and assure a proposal can be attributed to a certain degree of trustworthiness before data is collected (Mertens, 2020). This section outlines how the research questions and the selected data sources are positioned to capture a holistic description of the identified phenomenon.

This study proposes a primary research question, supported by two secondary research questions – they are as follows:

RQ_0: How do remote academic advisors describe facilitating graduate-level learner perspective transformations?

RQ_1: How do remote academic advisors decide when and how to transform a graduate-level learners' perspectives?

RQ$_2$: What is involved in remote academic advisors' facilitating a transformation in graduate-level learners' perspectives?

Effective research question development required an iterative practice of designing and refining the research scope. Qualitative data collection (such as interviews) is a common data source used to investigate transformative learning phenomena due to participants ability to share deep and meaningful explanations of their experiences (Lozada & Johnson, 2019) and contribute subjective accounts of social interactions (Mezirow, 1978). This study sought to gather at least 12-15 semi-structured interviews, which would be recorded and transcribed via Zoom. The same 10 interview questions would to be asked of each interviewee (see *Appendix F: Interview Guide*) with additional follow-up questions for each, to clarify details and meaning. Additionally, at least 18-20 open-ended questionnaires (see *Appendix G: Questionnaire Guide*) were needing to be collected via SurveyMonkey. Participants were asked to address questions ($n=7$) with short-answer type responses, using at least 250 words per prompt. The open-ended structure of these prompts also encourages participants to include sufficient descriptive detail to adequately explain their thoughts, feelings, and the actions they performed. As transcripts from both data sources were synthesized prior to theme development, each research question needed to elicit sufficient detail to address the primary question and both sub-questions.

To understand the true nature of this phenomenon, the identified research questions are organized under the theoretical framework of Mezirow's transformative learning theory (TLT). Mezirow (1978) contributes a cardinal dimension of adult development is founded in how individuals perceive themselves, transforming their

perceptions about the world to accommodate emerging theories, ideas, or structures. In adult learning, perspective transformation is a process by which prior experiences intersect with new information to make meaning (Kitchenham, 2008). Understanding how advisors decide which learners may benefit from and be receptive to a perspective transformation is a critical component of this phenomenon. Additionally, this research attempted to clarify the actions and communications an advisor might use to identify alternative perspectives related to a problem. Transformative experiences can be easily identified by examining learner interest and engagement, which can then be effectively utilized to predict an individuals' perceived acceptance of new information (Heddy et al., 2021). The primary research question and sub-questions are organized to holistically address the phenomenon of how advisors' describe their experiences facilitating learner perspective transformations.

Rationale for a Qualitative Methodology

Personal accounts of experiences are innately qualitative in research. The simplest definition for studies that require qualitative approaches is one where the researcher seeks textual data (words) to provide rich descriptive detail regarding a phenomenon (Braun & Clarke, 2022b). A qualitative methodological approach is necessary when investigating how remote academic advisors describe their experiences supporting learners. Since this research sought the subjective accounts of individual advisors within this target population, a purely qualitative approach is most appropriate. Qualitative research can be evaluated on standards of quality and excellence using measures of how the research designs balance structure versus creativity and accountability versus professionalism (Jarzabkowski et al., 2021). Qualitative research uses communication and relationships to

investigate phenomena, which is why structure needs to be balanced by creativity and why accountability needs the added influence of professionalism. Due to the need for subjective accounts from advisors of their experiences as they attempt to influence the perspectives of learners, a qualitative approach is most appropriate.

This section details why a qualitative methodology is appropriate to explore the phenomenon of how remote academic advisors' experience transforming graduate-level learner perspectives. For dissertation purposes, qualitative methodologies can comprehensively and efficiently explore a poorly understood phenomenon by manifesting meaningful descriptions in overt detail (Chess, 2020). The depth of complexity able to be attained from these approaches contributes significant potential influence over researchers' level of understanding regarding different lived experiences. The internal coherence of a study must fit qualitative research standards, to produce meaningful interpretations of observed behavior (Howard-Grenville et al., 2021). Where qualitative methodology may have been less established for a long-time in social and behavioral research, a revolution in interest regarding the human mind and learning psychology has created a renewed sense of importance for qualitative data collection and analysis strategies (Mertens, 2020). Scholars using qualitative methodology have rationalized that the phenomenon they are investigating would be best explored though descriptions or textual detail, relaying subjective accounts of the experience or event. As more researchers contribute to the body of qualitative research, there will be greater justification for its use exploring learners' perspectives.

While both a mixed-methods or quantitative study may be useful to discover different aspects of this phenomenon, a purely qualitative design is most appropriate for

understanding advisor descriptions of their experiences. The processes involved in the quantitative research methodology begins with an initial observation, then measurement of techniques and instruments used, and ends with a meaningful act of gaining correlational data (Choy, 2014). This would be appropriate if the study scope being investigated were seeking to only understand if perspective transformation as taking place because of advisor intervention. If the study had integrated a component to determine potential cause-and-effect associations for components of the advisor intervention process, mixed-methods would make sense. However, as all aspects of the identified research questions require rich descriptive detail, a mixed-methods approach would not be appropriate; there would be no purpose for gathering related quantitative data. For the current study design and problem space being investigated, a quantitative- or mixed- methodology approach is not appropriate to gain the descriptive detail needed to fully understand advisors' experiences interacting with learners.

Research investigating the dynamics of remote academic advisors as they facilitate different conversations to promote activity from graduate-level learners, may be of interest to different educational professionals. A significant paradigm shift occurring in higher education supports the use of transformative approaches to research and has created greater demand for qualitative data collection to address the cultural and ethical dynamics of different learning communities (Mertens, 2020). This study contributes to the total body of educational psychology research detailing the experiences of advisors. Every person has a unique way of communicating, some having greater ease while others struggle to communicate with the outside world (de Villiers et al., 2022). After individual advisors decide which graduate-level learners would benefit from a transformation in

perspectives, they must also make concerted efforts to help the learner acknowledge alternative perspectives. As a result of their conversations with the learner, they will independently attempt to facilitate a transformation in that learners' perspectives. To effectively explore how remote academic advisors' experience facilitating learner perspective transformations, a qualitative methodology was necessary for this research study.

Rationale for Research Design

Qualitative descriptive research can be used to provide a clear and concise depiction of educators' experiences interacting with and supporting learners. Understanding what an experience or event is like requires seeking out individuals that have enough familiarity to provide their subjective accounts. Grand Canyon University (GCU) emphasizes that a qualitative descriptive design allows researchers to investigate a poorly understood phenomenon at a manifest, overt level (Chess, 2020). To investigate the phenomenon how remote academic advisors experience facilitating transformations in graduate-level leaner perspectives, detailed stories of prior challenges, and explanations of advisor thoughts and feelings are needed. As qualitative descriptive research elicits straightforward, first-hand accounts of life events (Sandelowski, 2000), it can be used to describe the identified phenomenon. This research sought to understand advisors' experiences intervening with and facilitating transformations in learner perspectives by collecting first-hand accounts from semi-structured interviews and open-ended questionnaires. A qualitative descriptive design was effective for exploring this phenomenon due to the detailed, experiential descriptions sought. This section further

outlines rationale for research designs and indicates justifications for why different design selections were made.

To confirm the descriptive design is most appropriate for the identified study, evaluation of alternative research designs is necessary. Phenomenological research is one example, capable of eliciting necessary detail, but is most useful for gaining a variety of perspectives (McGill, 2018). These approaches would not be appropriate for this study as the researcher is not looking to explore "lived experiences" rather than rich, descriptive detail. A narrative study would also not be appropriate because the researcher as not looking to understand the role and responsibilities of academic advising. Also, a case study design would not provide descriptions of what advisors discuss with learners, or their rationale for why. Research that uses systematic processes and can be easily modified due to the flexible nature of topics discussed are known as grounded theory (Edgington, 1967). A grounded theory design would not have been appropriate also, as the research was not grounded in a set theory of academic advising. Instead, the researcher as seeking to understand how advisors describe the theories and strategies, they use to advise learners transformatively. The most appropriate research design to conduct the study was a descriptive review of advisors' experiences with the phenomenon.

The unique ways an individual advisor goes about intervening with learners to facilitate transformations in their perspectives can inform of the skills and knowledge essential to this occupation. Qualitative descriptive studies seek a complete understanding of an event through straightforward textual descriptions of different components of human experience (Sandelowski, 2000). Data sources in this study were designed to elicit

rich descriptive detail regarding how advisors feel, the thoughts they process, and the actions they undergo as they experience the identified phenomenon. Additionally, the researcher collected detailed descriptions from experienced advisors at one state-affiliated public institution in the Middle Atlantic states, to better understand how this target population experiences interacting with learners. Alvarado and Olson (2020) contribute there is a disproportionate amount of academic advisement-related studies using qualitative methods, where the researcher is directly involved. To effectively investigate the identified phenomenon, a qualitative descriptive design was most appropriate.

Population and Sample Selection

According to the U.S. Bureau of Labor and Statistics (2023), the educational and career advisement profession now exceeds 342,400 employees, of which approximately 130,112 individuals were employed at state, local, and private higher education institutions in 2022. This target population included all advisors that provide advisement, counseling, or career planning support for learners in the United States. Within this larger target population of advisors, 56,490 workers were employed at institutions in the 6 states of the Middle Atlantic states, which includes Delaware, Maryland, New Jersey, New York, Pennsylvania, and the District of Columbia (U.S. Bureau of Labor Statistics, 2023). This region was identified as the researcher is professionally affiliated with it and has institutional access to conduct research.

The identified institution is also one of the largest in this region and is also the only of its kind operating with a fully remote advisement population (B. Allen, personal communication, May 17, 2023). There are currently 412 advisors within this sample

population, each varying skills, experience, and approaches to their interactions with learners. These individuals represent different specialties within the student advisement function of the institution (i.e., admissions, career services, success coaching, tuition planning, etc.) which follows the types of scenarios where an advisor might intervene to transform a learners' perspectives. A sample of 30-35 advisors (at least 12-15 interviews and 18-20 questionnaires) was to be selected for contribution to this data, from the sample population.

This section outlines the population and sample selection procedures used for this research. Literature focused on graduate-level learners was less plentiful than for undergraduate-level learners, so any additional knowledge we may gain about supporting this population of learners has value (Meyer et al., 2022). To better understand how remote advisors describe their experiences facilitating graduate-level learner perspective transformations, this study collected semi-structured interviews and open-ended questionnaires from any interested participant within the target population. As advising professionals tend to volunteer for research at higher rates, the researcher was prepared for more interest in this study than would typically be expected (B. Allen, personal communication, May 17, 2023). To better understand the potential contributions of this research, the participant population and sample are outlined in the following section.

Study Sample and Sampling Strategy

This study utilized a primary sampling strategy (*plan A*), and two additional backup sampling strategies (*plan B* and *plan C*), for collecting study data. Gathering sufficient data to understand the holistic experience of remote academic advisors' facilitating learner perspective transformations was expected to be challenging. Having

these back-up plans in place allowed for efficient and timely collection of representative data for this study. While additional participation was welcomed, this study sought to gather a sample of at least 12-15 semi-structured interviews, and an additional 18-20 open-ended questionnaires, as this sample would represent approximately 15-18% of the target population.

Understanding the demographics of this participant population, this study required contributions from individuals with at least two years' experience advising graduate-level learners. While the remote academic advisement population continues to increase, the number of advisors that service graduate-level learners at one state-affiliated public institution has also yet to be historically tracked (B. Allen, personal communication, May 17, 2023). The goal of selecting how a sample population would be identified, was to ensure adequate data saturation to address the identified phenomenon. Study designs dictated the need for different degrees of data saturation to be achieved from the sample group (Mason, 2010). Participants were not allowed to complete both the interview and questionnaire, as this would ensure a more comprehensive scope of participant responses. To ensure the desired sample of participants (*n=30 to 35*) was acheived, the following research plans were established to occur over a three-month timeline (one month per plan).

Recruiting Plan and Site Authorization

Multiple sample collection considerations are made for qualitative study designs, all with the goal of recruiting adequate data from a select participant group. The selection of a primary sampling plan (A), and two backup plans (B & C) ensured alternative forms of recruiting participants were in place, should initial plans fail to generate enough

interest. Field testing indicated each interview was projected to last 45-60 minutes, and the questionnaire was predicted to take 20-30 minutes to complete. Site permission from the identified state-affiliated public institution was gained before contacting any potential participants, and full disclosure of what was expected of participants was be provided via Informed Consent (see *Appendix R: Informed Consent*). After authorizations to conduct research were received, the researcher contacted all advisors in the target population via email (see *Appendix D: Participant Notification*) in accordance with Plan A. Using an institutional distribution list for all advisement staff (*n=412*) in the target population, the date this email was sent was recorded to establish the beginning of data collection. Included with this email was the Criteria Verification Survey (see *Appendix E: Criteria Verification*), which confirmed participant eligibility and data collection interest.

Plan A. Convenience sampling was used for Plan A in this study. Emailing the full target population at the institution of interest was a relatively fast and easy way for the researcher to gather the intended sample. When participants are targeted based on their accessibility and willingness to contribute, it is known as convenience sampling (Lopez & Whitehead, 2012). A challenge with this strategy is it tends to rely on participant opportunity rather than identifying a targeted sample to describe the phenomenon. By opening the scope of potential sample participants to the entire academic advisement department, the researcher could more effectively locate willing participants who may not have been evident otherwise. For the study of facilitating learner perspective transformation, if less than 12 interviews or less than 18 questionnaires were collected as of two weeks from the date the initial notification, a reminder email would be sent to the same target population distribution list (see *Appendix*

D: Participant Notifications). After four weeks, if insufficient data had not been collected, the researcher would proceed to Plan B.

Plan B. The researcher would involve assistant directors overseeing the individual advisement teams as Plan B, to gather the identified sample for this study. The identification of purpose-based screening criteria to organize and identify sample participants is known as purposive sampling (Mertens, 2020). This secondary plan would be effective to collect data from the identified sample population, as it would allow the researcher to connect with advisors who are already demonstrating the skills needed to transform a learners' perspectives. This data collection methodology also helped prevent research bias in the same way statistical sampling does for quantitative studies (Patton, 2010). As of four weeks from the initial notification date, an email would be sent to this director group asking them to identify any advisors on their teams who may be capable of contributing to this study.

Participants would then be asked to identify individuals (see *Appendix D: Participant Notifications*) based on advisor tenure and the directors' observations of the advisors' skills facilitating learner perspective transformations. Plan B would focus on the identification of participants by casting a wider net to ensure equal opportunities for participant dispersion across advising teams. Referrals of 3-5 potential participants for this study would be requested from each leader. Then the nominated advisors would be individually contacted (see *Appendix D: Participant Notifications*) to inquire if they would be willing to participate in either an interview or questionnaire. After one week the leaders that have not provided a list would be contacted via email again, with a reminder email also e sent to the recommended advisors that have not responded for participation

after two additional weeks. If this strategy would not have been sufficient to collect the minimum sample of 12 interviews and 18 questionnaires, a final plan would be introduced.

Plan C. As of eight weeks from the initial date the target population was notified of this study, Plan C would begin with the researcher listing participants that have already contributed to the study. This list will be used to gain individual referrals on additional potential advisors that might be qualified and willing to become part of the sample population. Snowball sampling is an effective means for locating diverse participant groups because it relies on a referral method for sourcing participants (Patton, 2010). By using the current population of sample participants to identify other potential participants, the study will have sufficient opportunity to access other advisors capable of describing their experiences facilitating learner perspective transformations. The researcher would use then have used the sample participants to individually reach out and request their assistance making a connection with another potential sample participants. This sampling strategy is more effective as a backup in studies when data is typically more complex to source, than more generalized studies (Mertens, 2020). As of two weeks from when the initial email was sent to the sample list, a reminder (see *Appendix D: Participant Notifications*) would have been sent to individuals that had not communicated about their efforts to identify potential participants. If deemed necessary, as of week 12 from the initial notification date, the researcher would send a final 'last call' email (see *Appendix D: Participant Notifications*) inquiring if there is any final interest in participation. With this plan the researcher could leverage the internal network of participants as a means for increasing interest to become part of the sample for this study.

Sources of Data

Data sources are strategically integrated into qualitative research projects to elicit the best potential understanding of an identified phenomenon. How advisors experience facilitating graduate-level learner perspective transformations was an unknown problem. This section outlines the data sources used to study this phenomenon, including how the researcher developed both the interview and questionnaire. Using technology to enhance the ease of collecting and analyzing qualitative data creates more opportunities for researchers to connect with participants despite proximity (de Villiers et al., 2022). By gathering descriptive data from semi-structured interviews and open-ended questionnaires, this study seeks to identify first-hand accounts of advisor's experiences. Research data collected from at least 30-35 advisors informed of the descriptions used by advisors to feel, think about, and act on needed transformations in learners' perspectives. Expanded research on advisor intervention strategies used to support and guide learners could further clarify important responsibilities and roles within this profession.

Research Data

While the desire to understand a phenomenon is important, how research data is collected makes a direct impact on study outcomes. For this research, 12-15 semi-structured interviews (see *Appendix F: Interview Guide*) and 18-20 open-ended questionnaires (see *Appendix G: Questionnaire Guide*) at minimum were necessary to gain a holistic description of the identified phenomenon. Research questions asked of participants were designed to elicit details regarding a range of characteristics pertinent to advisor interventions where a learners' perspectives needed to change for them to move forward. It is also worth noting that qualitative data sources are apt to address more than

a set of questions (Braun & Clarke, 2022b). Supplemental questions were asked throughout each interview to expand initial responses to research questions. These efforts help the researcher gain further detail and ask for clarification on comments made by participants. A sample of advisors for this study was recruited from the population of stateside (not located internationally) remote academic advisors servicing graduate-level learners at one institution in the Middle Atlantic states. The perspectives of advisors as they interact and intervene with learners, was of central importance to the data collected in this study.

Semi-Structured Interviews. In total, 12-15 semi-structured interviews was needing to be collected from advisors in the target population. The researcher recorded and transcribed each interview using Zoom. Utilizing systems participants were familiar with (such as Zoom) allows for the establishment of longer-lasting rapport, resulting in more meaningful contributions over time (de Villiers et al., 2022). Participants were scheduled for 90-minute appointments, each with a unique identification code and password for participant access. When participants joined their scheduled appointment, they were instructed how to change their system name to a participant number assigned by the researcher. After a few initial minutes of establishing rapport and ensuring the participant felt comfortable, the researcher officially started each interview by beginning the recording. Three initial questions were asked to gather background/demographic information on participants, followed by eight research questions; follow-up questions were asked to address benchmark content for each primary research question. Research questions framed to address a strategic benchmark can contribute at least twice as much

content to a discussion (Ogles et al., 2021). Each interview was expected to take 45-60 minutes to fully address all background, research, and follow-up questions.

Open-Ended Questionnaires. This study also intended to gather 18-20 open-ended questionnaires via SurveyMonkey. Consenting participants would be sent a secure link to access the questionnaire and would have the option to save their work and return to it later if they choose. Due to the structure of descriptive questionnaires, collected data is typically richer in detail and focused on unique experiential phenomena (Braun et al., 2021). As such, a minimum character response of 200 words was set for each research question. There was not a maximum limit for these contributions, to allow for participant elaboration as needed. The questionnaire contains five open-ended questions regarding how the participant advisor feels and thinks about the process to transform a learners' perspectives. Using open-ended questions to gain a more detailed understanding of different academic environments contributes clarity, brevity, and positivity in educational psychology research (Mertens, 2020). This study seeks to collect data that provides holistic details regarding the advisors' role in facilitating a transformation in learners' perspectives about something related to their academic success.

Additional Data

Additional data was collected from research participants based on need. It can be challenging in educational psychology research to maintain a self-reflective viewpoint, particularly where the researcher has direct personal experience (Mertens, 2020). For this study, additional necessary data to be collected included Criteria Verification to determine participant eligibility, field testing of data sources, member checking of transcripts, and background data on participants. Initial data (inclusion/exclusion criteria)

was provided to, and acknowledgements collected for, screening out qualified and interested participants from the target population. Additionally, the researcher collected three field tests of the semi-structured interview and one field test of the open-ended questionnaire. These questions asked how often the advisor typically interacts with graduate-level learners, what changes when they advise graduate- vs. undergraduate-level learners, and how much autonomy the advisor has, to decide when and how to intervene with different learners. By asking these demographic questions at the beginning of the interviews and questionnaires, the researcher can use this information to better assess the quality and depth of participant answers from data collected. After survey data was fully collected, transcripts were sent back to participating individuals to verify the accuracy of content (Menke et al., 2020). This process of 'member checking' interview transcripts ensured the context and meaning of participant statements was fully realized. Additionally, by gathering a demographic survey from participants before gathering research data, the work of later analyzing the full context of responses was more manageable.

Trustworthiness

Conducting research without a firm belief in its truth is more likely to result in an ineffective study design. Lincoln and Guba (1982) contributed to the ethicality of research practices by organizing a four-pronged process to estimate trustworthiness. This knowledge was later established as protocols for qualitative research: credibility, transferability, dependability, and confirmability (Amankwaa, 2016). The current study used a qualitative descriptive design due to the growing prominence of this methodology in advisement literature. Reviewing the trustworthiness of qualitative data collection and

analysis designs assures this research aligns epistemological and philosophical foundations, establishing reliable methodological approaches (Aguas, 2022). To assure trustworthiness in the study, the reliability (credibility and transferability) of design components have been assessed, along with the validity (dependability and confirmability) of utilized approaches. By adhering to standards of research reliability and validity, the likelihood that this study will elicit the desired depth of contextual data necessary to understand a phenomenon increases. In this section, the steps taken to assure trustworthiness of this research are outlined.

Producing reliable and valid themes of advisors' descriptions for their experiences with learners is best approached from a qualitative descriptive perspective. Qualitative methodologies provide unique opportunities for researchers to gain detailed stories or narrations from education professionals regarding their everyday experiences (Stahl & King, 2020). As story-telling is a natural way for participants to relay their experiences, validating the trustworthiness of data collected for qualitative studies is an important research step. The researchers' employment as a member of the target population could result in unintended biases if not closely monitored. To mitigate bias, bracketing was be used to objectively collect and analyze study data. This intentional practice of separating personal expectations from data collection established credibility for research and allows for the confirmability of a study. An effectively designed educational research study is identifiable by reviewers as reliable (credible and transferable) and valid (dependable and confirmable).

Reliability: Credibility & Transferability

When research is performed using consistent, reliable standards of practice, it demonstrates notable qualities of trustworthiness. One way this research demonstrates reliability by using credible (convincing or plausible) data collection methods (interviews and questionnaires). This study uses a semi-structured interview approach and asks open-ended questions in both data sources to gather credible, first-person descriptions of the identified phenomenon. A researchers' ability to effectively complete the exhaustive steps associated with qualitative data collection demonstrates their capacity to also analyze such data accurately (Arouri et al., 2023). Additionally, the transferability of study designs (can be applied to studies with other target populations) establishes trust by showing rationale for why study designs have justification. Researchers actively identify (and bracket) their learner perspectives with a potential for bias, as this activity allows them to suspend their judgments and review research data objectively (Billups, 2021). This further ensures research trustworthiness due to its ability to be applied for related research applications in the future. Both member checking and bracketing (in the form of reflective journaling) were used in this study to ensure the credibility and transferability of research findings.

Validity: Dependability & Confirmability

To inform of the degree of validity in a study, a researcher benefits from including clear measures to prove dependability and confirmability in their research designs. It is notable that a critical component of validity is achieved by tracking the data used during the study analysis phase (Braun & Clarke, 2022b). In this study, an audit trail was used to track data the researcher collected and establish confirmability (meaning the

data can be corroborated by others). While confirmability involves the researcher auditing their work to ensure it contributes objectively to understanding about a given phenomenon, dependability is also important as it encompasses the 'trusting' components of trustworthiness (Stahl & King, 2020). The design strategies used for this study are dependable for the identified research questions because the methodology, design, data sources, and analysis plans were drawn from related industry research. To confirm validity in this research, a consistent audit trail was collected, and dependability was then justified with reliable, consistent interaction with study participants.

Data Collection and Management

Conducting effective research requires finding the right data collection and management procedures to investigate a given phenomenon. To understand how academic advisors facilitate learner perspective transformations, this research collected advisors' subjective accounts of this experience. Interviews and questionnaires are two of the most utilized sources for qualitative data collection, particularly within education research (Mertens, 2020). For this study, 12-15 semi-structured interviews and 18-20 open-ended questionnaires were needed at minimum (a sample of 30-35) from the target population of advisors at one state-affiliated, public institution in the Middle Atlantic states. Interview and questionnaire details were developed to gain a detailed description of the thoughts and feelings advisors experience, along with actions they take, to facilitate learner transformations. Research questions were developed to elicit rich, descriptive stories of advisors' prior experiences facilitating different types of learner perspective transformation outcomes. This section informs of the data collection and management procedures followed in the study. Design decisions are justified and

explained, along with clarification for how the collection and management procedures aligned with identified research questions.

Data Collection

The procedures used to gain advisors' descriptions of their experiences interacting with and facilitating learner perspective transformations were expected to take 4-8 weeks to collect. After the research questions were identified to explore this phenomenon, semi-structured interviews were noted as the best way to gain descriptive details from participants about their experiences. Additionally, via an open-ended questionnaire the researcher was able to ask participants for narrative-type descriptions of their past experiences interacting with learners, adding context to the data collected. Qualitative data sources (such as interviews and questionnaires) are effective data collection strategies because researchers and participants are often already familiar with such procedures already (Braun & Clarke, 2022a). Both sources of data were collected simultaneously, which enabled more efficient analysis and reporting of findings. The following sections outline the procedures completed prior to data collection and the steps taken to collect the data once approved.

Prior to Data Collection. Before collecting research data, field testing as completed and site-specific permissions and approvals were received, to assure research ethics and trustworthiness. Field testing efficiently informed of the feasibility of the researchers' design choices (Braun & Clarke, 2021). For this study, three field tests were conducted of the semi-structured interview and one field test of the open-ended questionnaire. The field test transcripts were then analyzed, and necessary revisions made to the proposal (chapters 1-3). The goal of this testing was to allow for realignment of

data collection designs prior to collecting research data, however further institutional approvals were also needed. The field testing informed how the interview and questionnaire data developed, needed to be revised for practical application. Obtaining appropriate permissions and approvals prior to conducting research ensures that the study meets the academic quality standards (Head, 2020) and allows the researcher to access participants in the target population. This study required approval from the dissertation committee, academic quality review board, and two institutional review boards (one for the degree-granting institution and one for institution of record for this research). After approvals are obtained, the following procedures were followed to collect data necessary to address the identified phenomenon.

Collecting Data Sources. Participant notification begun when all institutional approvals were received. The target population was accessible via an email to notify of the study purpose and criteria for participation. To contact the target population, an email distribution list available to institutional staff was utilized. Interested participant advisors were sent a link to confirm their eligibility to participate (see *Appendix E: Criteria Verification*); this survey also allowed them to select which preferences for how to contribute (which data source). Upon completing this survey, a copy of the informed consent document(s) was emailed to the address participants provided. As the more time-intensive data source to collect, persons interested in the interview (or both/either the interview or questionnaire) were prioritized for interviews. The researcher then sent a reminder notification email (see *Appendix D: Participant Notifications*) when less than 12 interviews and 18 questionnaires were completed as of two weeks (15 days) from the initial notification date. Additional follow-up notification emails were sent out at four

weeks (30 days) and 6 weeks (45 days) from the initial notification date. Since the minimum desired sample was collected as of eight weeks (60 days) from the initial notification date, the study ended and no further contributions were gathered. Three total sampling plans (a primary and two supplemental) were utilized by the researcher to address potential issues sourcing data for this study.

Semi-Structured Interviews. The sample of interviews (see *Appendix F: Interview Guide*) as organized using Zoom; participants that consented to interviews were invited to a 90-minute appointment. To assure timeliness of participant engagement, interview appointments were scheduled at earliest participant availability, no more than two weeks from when consent was provided. Typically 60 minutes is an accepted protocol for semi-structured interviews to investigate phenomena in higher education (McGill, 2021). This research allows an additional 30 minutes for potential questions, initial rapport building, and to help participants get comfortable with the interview process. Interviewee's feel more at ease with the data collection process when a researcher communicates what to expect (Mertens, 2020). Upon starting the recording the researcher introduced the phenomenon, then asked three background questions. These initial questions were used to gain demographic information on the participant population. Then, the researcher addressed each interview question, asking strategic follow-up questions to ensure benchmark content was addressed.

Open-Ended Questionnaire. While interviews were being scheduled and conducted, questionnaire data was independently collected. Respondents consenting to participate in the questionnaire (see *Appendix G: Questionnaire Guide*) were sent a secured link for access (via SurveyMonkey website). A more detailed introductory

description of the purpose for this research and what can be expected of the questionnaire was provided as an introduction for this data source. The same three initial background questions were asked of participants as transcripts from both data sources was synthesized during data analysis. Then participants responded to five open-ended research questions aimed at gathering detailed stories of experiences transforming learners' perspectives. Qualitative questionnaires are more effective when seeking short-answer responses from participants (Boz & Dagli, 2017). To ensure sufficient detail was provided for each question, a minimum character count of 200 and no maximum character limit was applied. Additionally, sub-questions have been added for participants to expand their answers and guide the focus of their responses.

Data Management

As qualitative research data was collected, it was securely managed for protection of participants. This research used fully electronic data collection and analysis procedures, creating a need for data encryption, secured storage of data files, and an effective data destruction plan. Throughout the study, data was stored on a dedicated external hard drive, in addition to a cloud-based copy and an email copy. This system of saving multiple data backup files provided a reasonable assurance that digital data would not be damaged, lost, or stolen (Office of Reseach Integrity, 2022). To secure this stored data, passwords were used to access the external hard-drive, cloud storage system, and researchers' email. Participant data was never printed, and access was restricted to needs-based. Documents were collected and stored, including participant responses to informed consent and criteria verification surveys, interview recordings (mp4), and interview and questionnaire transcripts. After the point the researcher deems necessary, all data will be

destroyed from all storage devices (Bateman, 2022). For this study, all data will be stored for (at least) five years after publication.

Data Analysis Procedures

To address the phenomenon of how academic advisors describe facilitating learner perspective transformations, interview and questionnaire data was collected from advisors with first-hand experience with this process. The purpose of this qualitative descriptive study was to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations. To investigate this phenomenon, the primary research question of how remote academic advisors describe facilitating graduate-level learner perspective transformations was necessary. This led to the organization of two distinctive research questions for this study, asking 'when and how' transformation occurs, as well as 'what is involved' in remote academic advisors' facilitating a transformation in graduate-level learners' perspectives. The unit of analysis for this study was college advisors experiences, which was then analyzed using being a deductive approach.

Researcher Subjectivity

Braun and Clarke's' contributions to qualitative research were impactful on this study, as the reflexive thematic analysis process enables researchers to make meaning of subjective life experiences. While the uses for reflexive thematic analysis (TA) in qualitative psychology are often misunderstood, emphasizing the need for careful conceptual and design thinking ensures balance between research methodology and design (Braun & Clarke, 2022a). A unique attribute of this study was the researchers' role as an advisor within the sample population at the institution of record. This role

contributes first-hand knowledge related to the scope of this study, including practices, procedures, and opportunities for observation related to the identified population. The reflexive thematic analysis approach was most appropriate for this study because it emphasized the researchers' subjectivity as a benefit to the analytic process, rather than a challenge to be overcome.

To study the experiences of academic advisors as they interact with and facilitate transformations in learners' perspectives, capturing the researchers' subjective awareness is critical. As a tenured advisor within the institution of record, prior knowledge of institutional practices informed elements of the study design process, as well as collection and analysis of participant data. Rather than focusing on designing a study with a completely objective focus, this study benefits from the engagement of the researcher. One example of this is evidenced in the coding process, as this approach required an additional resource (reflection journaling) to track and prevent researcher bias. By engaging in self-reflection and assessing researcher awareness, reflexive thematic analysis embraces the benefits of a first-person perspective on qualitative research studies (Braun & Clarke, 2022a). Reflections made throughout the study were used to address the internal thoughts and perspectives of the researcher, supporting the integrity of the study and related findings.

Field Testing

Field testing confirmed that participants are willing to provide rich descriptive detail regarding their prior experiences advising learners, when prompted. While many types of analysis have been developed and used successfully in qualitative studies, the reflexive thematic analysis approach was most appropriate for this study due to the

identified phenomenon and research questions. There are several thematic approaches to analysis, all of which allow a researcher to prioritize data using coding, however a reflexive approach is more structured and includes a focus on early theme development (Braun & Clarke, 2021). Braun and Clarke (2022b) introduced six general steps that guide the process of reflexive thematic analysis in diverse behavioral and social science applications, including 'familiarization with the data', 'generating initial codes', 'identifying categories', 'theme development', 'defining/naming themes', and finally producing a 'report'. In the remainder of this section the data counts for initial, synthesized, and final codes, categories, and themes are presented. Details outlined include how the researcher applied a reflexive thematic approach to analyze the data collected. During field testing the researcher evaluated the applicability of each procedure, to verify how reflexive thematic analysis would help address the research questions.

Analysis Procedures

Step 1: Familiarization with the Interview Data. The first step the researcher took was to familiarize themselves with the interview data. Initially, to ensure collected data was accurate, transcripts from each interview were sent to individual participants for review. After confirming the accuracy of content and verifying interview transcripts' did not contain additional detail worth analysis for this research scope, each document was uploaded into the MAXQDA system. During this upload, participant anonymity as maintained using an excel spreadsheet to identify a cross-reference of participant names and pseudonyms. This is when the first step in the reflexive thematic analysis process formally begun, as the researcher spent time reading and becoming familiar with the

content in all collected interview transcripts. Analysis of questionnaire data then began in a later procedure. As the researcher reviewed these transcripts, they noted informal observations of initial themes and perceptions from participant contributions.

Step 2: Initial coding of Interview Data. In the second step of analyzing this data, the researcher used the coding tools available within MAXQDA to highlight initial themes noted. As the research sought to gather descriptions from a specific experience, a deductive approach to analyzing this data was used. Braun and Clarke's reflexive thematic analysis process outlined a clear and logical flow for researchers to effectively analyze qualitative interview and questionnaire data (Byrne, 2021). Throughout this process, the researcher would continue applying initial theme codes to participant statements, until all interview transcripts had been completed. To start off the next step in the reflexive thematic analysis process, the researcher adjusted the views in MAXQDA to see all codes generated in step two. Initially the researcher will only be identifying codes from the interview data, however questionnaire data would be added to the initial coding as of Step 4. As part of the initial review and identification of codes, the researcher identified terminology and concepts commonly discussed by participants. They then took personal notes on what codes they thought may be emerging as they reviewed each transcript and retained their notes for later analysis steps.

Step 3: Initial Theme Generation. In the third step of this process, mid-level categories were formed based on patterns the researcher identified while reviewing the initial segments of highlighted data. Codes are simple, precise statements that convey the context, meaning, and essence of a phenomenon (Merriam & Tisdell, 2016). This process took time as the researcher needed to follow the context of all initial codes until they are

sure all data has been identified and formed into categories. Before continuing to the next step in this process, the researcher would apply the same three steps to start analyzing the collected questionnaire data. While it may have been challenging to go back through these initial steps again, that discomfort is intentional. Braun and Clarke (2022a) remind us that researchers must become comfortable with the inevitability of uncertainty and discomfort when conducting reflexive thematic analysis. With practical application of the above-outlined steps on all interview data, the researcher produced an initial codebook, organized into initial categories and themes representative of their ability to address the identified research questions.

Step 4: Repeat Steps 1-3 with Questionnaire Data. In the fourth step the same prior steps completed for interview data, was duplicated across questionnaire transcripts. This process generates themes of unity, implicit (latent) intent, and other details that the researcher can use to carefully analyze and interpret meaning from the data (Braun & Clarke, 2019). After gaining familiarity with all transcripts, the researcher used MAXQDA to identify individual segments of code. Then, this data was further reviewed and organized into categories addressing each component of the research questions. Finally, initial themes were identified as representative of this data set.

Step 5: Synthesis of Generated Themes from Both Sources. In the fifth analysis step, the researcher synthesized (combined into one document) the list of generated categories and themes identified from both the interview and questionnaire data. As of completing Step 4, all initial themes for the collected data were synthesized into one document. With this data, the researcher could then analyze the assumptions they have made about what participants have said in their interviews and questionnaire

responses (Byrne, 2021). The words or statements that have been used by participants to describe their experiences interacting with learners were organized into a final list of themes, in the fifth analysis step. Words, phrases, and statements that were related by the same theme were organized into data tables to indicate their frequency of use and inform of specific terminology used.

Step 6: Theme Refining, Defining, and Naming. In the sixth step, the researcher reviewed the categories and themes identified in prior steps, creating a holistic picture of participant responses to the research questions. In this step the researcher refined, defined, and named the final list of themes which were further explained in the final phase, reporting. To accomplish this, the researcher reviewed the table of themes that were generated in the prior step and create working definitions for what each theme means. The researcher had reviewed the research questions throughout this process, to refine how to best define theme. Unique naming structures were applied to each theme, capturing the significance for addressing each research questions in this study. Using rich, descriptive detail the researcher then revised each definition as further justify the naming applied to each theme.

Data Written-up as a Report. In the second part of this final step, the data as written up as a report to explain how themes emerged and highlight critical descriptors relayed by participating advisors. This includes a written summary of the data collected, paying close attention to how the themes generated and defined in prior steps, address the research questions. As part of developing this report, the researcher organized a table with the final data counts for initial codes, final codes, categories, and final themes. This report includes the researchers' rationale for the initial themes they defined, how data was

synthesized, and provides an explanation of the themes that were synthesized between data sets. Additionally, this report details the researchers' process to define and name each of the final categories and themes. To summarize this report, the researcher also included details regarding how the data individually addressed each research question.

Managing Analyzed Data

The researcher used a combination of information security and depiction technologies to manage the data during and after collection. Reasonable assurance that digital data would not be damaged, lost, or stolen must be assured for all research studies that utilize technology to collect, manage, or analyze data (Office of Research Integrity, 2022). To protect this data, the researcher utilized a secure password-protected cloud system to save and access all data; these encryption technologies were used to make the data easy to access, store, and securely manage. Data as never printed or shared with others outside of the research project and will not be without the participants' written consent. As data was being collected, the analysis details, including the codebook(s) and researcher notes were stored on the same external hard-drive and cloud service as collected data. Additionally, data will continue to be stored for five years (at least) after publication, when all data will be purged from the cloud storage, external hard drive, and email system (Bateman, 2022). By following these steps, the researcher was able to efficiently analyze the data collected, as well as make efficient work of reporting their findings.

Ethical Considerations

Regardless of the study scope or topic, if it involves human beings (or other living organisms), research must abide by ethical standards and is subject to authoritative

review. Per the guidelines established in the Belmont Report, respect for persons, beneficence, and justice are basic principles which all researchers must abide (Department of Health, Education, and Welfare & National Commission for the Protection of Human Subjects of Biomedical and Behavioral Reserach, 2014). In action, a researcher would demonstrate these principles by designing with consideration for how participant data will be recorded, stored, and eventually destroyed. Other important ethical considerations include how informed consent is provided, which is where participants' ability to withdraw and risk prevention measures are outlined, (Berkovich & Grinshtain, 2021). For this study, to ensure time for critical self-reflection, the researcher journaled after each interview and submitted interview transcript copies to individual participants to verify content (member checking). Both measures allowed the researcher to address trustworthiness of data collected, while also protecting the rights and well-being of participants. Additionally, explaining prior experiences with transforming learner perspectives introduced the risk of bringing up traumatic incidences for participants, therefore counseling services were available should they have been needed. This section identifies potential risks of harm to participants and how the researcher mitigated these risks throughout the study.

Understanding what makes research practices ethical and the conditions in which it is acceptable to conduct research using human subjects is critical to the development of a scholarly researcher. Innovative communication technologies have helped alleviate the proximity barrier between researcher and many diverse participant populations (Billups, 2021). For this study, the researcher begun recruiting participants by sending an initial notification email (see *Appendix D: Participant Notifications*). They were then linked to

the Criteria Verification survey (see *Appendix E: Criteria Verification*) to submit for formal notification of their participation interests. By gathering appropriate consent from academic research participants prior to data collection, a researcher can address the potential risk of scope-creep and validate the ethical standards used to guide their design decisions (Whitman, 2021). As the final step in submitting the Criteria Verification survey participants were provided with a copy of the Informed Consent document (see *Appendix C: Informed Consent*) and asked to acknowledge their receipt and review of the information. Participants were also notified the study was optional and they may decide to cease participation at any time if they should choose (several times throughout study process). The outlined measures ensured the rights and well-being of participants were addressed throughout the research design and data collection process.

Understanding how to identify key ethical criteria influencing a given study comes with practice and thorough review of prior research. For this study, key ethical considerations included addressing potential conflicts of interest, concerns for anonymity, confidentiality, and privacy. The researchers' employment as an academic advisor within the target population identified for this study introduces potential conflicts of interest and challenges for anonymity. By leveraging established rapport with members of the target population, awareness of this challenge was used to mitigate the potential negative impacts associated with conflicts of interest. Anonymity was assured via the secure data management tools available for questionnaires via SurveyMonkey, however, to assure anonymity for interviews all participants were guided to change their screennames on Zoom recordings. Confirmation bias should be considered by any educational psychologist conducting research within their professional field or with extensive

personal experience because their preconceived beliefs could take privilege over new information being shared (Mertens, 2020). By asking open-ended questions of participants, both data sources for this study sought to identify key criteria defining the phenomenon.

This study was feasible due to the methodology, design, instrumentation, and research questions being credible, dependable, transferable, and confirmable. Participation in this study was not incentive-based, though departmental leaders supervising the target population have indicated support for the study (A. McPartland, personal communication, May 7, 2023). The researcher scheduled individual audio-visual enabled interviews via Zoom with participants and the recorded video of each interview was saved to a secured, password-protected folder in a virtual cloud system that only the researcher had access to open. Additionally, a link to the questionnaire was sent to questionnaire participants and responses were be captured anonymously via SurveyMonkey. Both the survey system used and the folder where the researcher stored the data, were encrypted to protect the information. All data will be stored for five (5) years post-publication before being electronically purged from the cloud storage system, in addition to any personal devices the researcher used to access data. Access to this data will continue to be granted based on academic or professional need, and only granted to the necessary institutional representatives. This research adheres to established ethics standards and criteria for professional research in the behavioral health and higher education fields of professional study.

Assumptions and Delimitations

Reviewing research involves the intentional practice of assessing the assumptions that influence a designed study and the delimitations that a researcher has introduced via their decision-making. Qualitative research is valued in the investigation of unique segments of a learning population, particularly those with additional needs and accommodations that impact their learning capabilities (Mertens, 2020). In this study, graduate-level learners were considered a special population group due to their unique prior achievement of having graduated from an undergraduate-level program. Advisors supporting these learners might expect to guide them towards more professionally-oriented achievement goals than would be necessary with undergraduate populations. In the past couple of decades, a substantial increase in research was introduced related to online graduate-level learners, though there remains substantial room for understanding different aspects of supporting this learner population (Martin et al., 2022). This study sought to clarify the experiences unique for this target population, by examining the described experiences of advisors at a state-affiliated public institution in the Middle-Atlantic states.

Qualitative researchers must practice evaluating the study's they design for potential assumptions and delimitations which may influence their investigation. Assumptions develop when a researcher reviews and highlights the ways that different variables are related; their belief that these variables are related is what drives their research design decisions. In addition, as the researcher reviews literature and identifies the characteristics of a given phenomenon, how they adjust different study boundaries (known as delimitations) becomes a defining factor. When reviewing a study, individuals

would determine whether the content is trustworthy based on different factors they have deemed valuable. The composition of sources a researcher uses to manage this data has influence on whether someone reviewing a study may trust the data collected or the evaluation methods used to report on the issue (Yanhong, 2022). The following outlines how this study was designed, by detailing the assumptions and delimitations addressed within this research.

Assumptions

- The assumption that a study will follow a set procedure is inherent to qualitative designs due to researchers' ties to a given field of interest. Common assumptions within qualitative research designs are that a study would follow process-based design structures (Atieno, 2009). Additionally, the semi-structured interview format is more conversational in nature (Elhami & Khoshnevisan, 2022). Therefore for this study, the interview questions were designed to be conversational to gain detailed descriptions of advisor experiences. The assumption was that the narrative format of these interview questions would result in greater illustrative detail but still follow a basic story-telling format.

- For areas of research that have been previously underrepresented, researchers must be sure the rigor of designing a trustworthy study would effectively fulfill the intended knowledge gap. Another common assumption about the structure and approaches used to conduct qualitative research is that it lacks sufficient saturation of detail and support from a given theory (Sebele-Mpofu, 2020). A researcher using qualitative methods to explore the experiences of educators must therefore emphasize meaning over correlations like cause-and-effect. This study assumed participants would provide context and detailed revelations of their experiences interacting with learners via a qualitative descriptive approach to data collection (i.e., semi-structured interviews and open-ended questionnaires).

- The researchers position as an advisor at the identified state-affiliated public institution in the Middle Atlantic states justifies the assumption that transformative advisement practices are taking place. Ethically organized and conducted studies intentionally identify and manage internalized assumptions that may influence their decision-making process. Taking the steps to prove the applicability of different design choices has enhanced the development of researcher understanding related to how to investigate the given phenomenon. Self-awareness is a critical component of transformative learning as it shapes individuals' perspectives regarding themselves and their relationships with others (Jaakkola et al., 2022). Retaining self-awareness of relationships between variables in this phenomenon has helped the researcher mitigate potential issues

from their own beliefs regarding the described experience of facilitating graduate-level learner perspective transformations.

Delimitations

- A researcher's personal design choices (i.e., their delimitations) should also be mentioned. Adverse impacts from delimitations arise from too much exclusion or inappropriate inclusion of different design components (Coker, 2022). The researcher included an advisement tenure benchmark of 2 years and selected the graduate-level learner population to capture a sample of more advanced learner scenarios. This delimitation was intended to assure that participants have the experiential knowledge to effectively contribute rich, descriptive detail regarding facilitating learners' perspective transformations. While all potential transformative topics impacting a learner had potential for focus in this research, by focusing participants on advising graduate-level learners, this study was positioned to identify more career- and academic-oriented advisement scenarios.

- The transformative learning approach to academic advisement research caused another delimitation the researcher acknowledges. Learner perspective transformation could involve a wide range of advisement scenarios but was also so broad that if insufficiently explained during data collection, could be limiting. The generalizability (or transferability) of qualitative research required a burden of proof that can be difficult for a researcher to approach (Mertens, 2020). Proven methods for designing, conducting, and reporting on qualitative descriptive studies were reviewed to ensure the study adequately addresses this phenomenon. It also used transformative learning theory to establish a theoretical foundation and guide research question development.

- There was a lack of clear definition or data reporting to define the total number of advisors matching demographics of the target-population. The formal target population could result in a sample far less than predicted or could also result in far more interested participants than estimated, therefore both scenarios needed to be planned for. Conducting fieldwork through interviews and gathering documents from participants (like questionnaires) allowed the researcher to gather multiple learning perspectives and creates opportunities for more straightforward synthesis after all data had been gathered (Patton, 2010). This study focused on a target population of advisors working for one state-affiliated public institution in the Middle Atlantic states to centralize sample participant responses on the learners, rather than institutional differences.

Summary

This study explored remote academic advisor descriptions of facilitating graduate-level learner perspective transformations. To collect the subjective accounts of advisors, a sample was taken from the target population of advisors at one state-affiliated public

institution in the Middle Atlantic states. As this sample was from one institution, responsibilities and expectations of advisors were the same, allowing the data to be directly attributed to individuals rather than institutions. Transformative learning has influenced adult education discourse by establishing new approaches for advisors to motivate learners by forming longer-term academic relationships (Mezirow, 2003). More literature was needed though, to understand how academic advisors describe their experiences interacting with and supporting the achievement outcomes of learners. Due to the typical length of advanced degree programs, the long-term basis of the advisor-learner relationships, further research was needed to understand how advisors go about influencing different advanced learner perspectives.

To gain descriptions of advisors' interactions with learners they support, a qualitative descriptive approach was most appropriate. For this qualitative study, semi-structured interviews and open-ended questionnaires were also selected to provide rich, detailed descriptions of advisors' experience. Virtual interviews are commonly used in qualitative studies where distance is a barrier, such as events that take place in remote learning environments (Mertens, 2020). Additionally, online questionnaires have become an effective and reliable source of gathering scholarly academic research because they are easy to use, flexible to share, and can be easily secured (Braun et al., 2021). Acknowledging the unique structures that add to the challenge of scholarly research, this study attempts to collect descriptions of how academic advisors explore the disorienting dilemmas of learners as they are exposed to alternative information. Using their advisement skills and knowledge, this study explores how these advisors go about transforming these learners' perspectives to incorporate new information gained.

The quality and efficiency of different advisement approaches may be useful knowledge for persons interested in the development of the academic advisor occupation. There is substantial variation in occupational scope, responsibilities, and expectations within the greater population of advisement professionals. Qualitative descriptive research questions were asked of participants to ensure the data collected reflects the subjective accounts of advisors, despite their total knowledge related to transforming learners' perspectives. After both sets of data were collected from the target population, a review was conducted to analyze the data using a reflexive thematic approach. This approach to qualitative data analysis required the researcher develop themes (or patterns identified from qualitative data collected) as this was considered more accurate and reliable for collecting data that is subjective or interpretation-based (Braun & Clarke, 2021). The final themes generated from this review are discussed further as part of the final reporting in upcoming chapters, including conclusions made regarding the research findings and potential implications for future research.

Chapter 4: Data Analysis and Results

Introduction

This qualitative descriptive study aimed to understand how remote academic advisors at a state-affiliated public intuition in the Middle-Atlantic states, described facilitating transformations in graduate-level leaners' perspectives. A primary research question was identified to frame the study, which was supported by two secondary research questions, as follows:

RQ_0: How do remote academic advisors describe facilitating graduate-level learner perspective transformations?

RQ_1: How do remote academic advisors decide when and how to transform a graduate-level learners' perspectives?

RQ_2: What is involved in remote academic advisors' facilitating a transformation in graduate-level learners' perspectives?

While the first research question was used to identify 'when' and 'how' advisors decide to intervene with learners, participant responses to the second research question outlined the 'steps involved' in facilitating these learning transformations. To understand the identified phenomenon, this study included the individual collection of 18 semi-structured interviews and 35 open-ended questionnaires from participants with at least 2-years'-experience advising graduate-level learners.

To investigate how remote academic advisors experience facilitating transformations in graduate-level leaner perspectives, detailed stories of prior interactions, and explanations of advisor thoughts and feelings were analyzed. As qualitative descriptive research elicits straightforward, first-hand accounts of life events

(Sandelowski, 2000), this was the most effective strategy to gain participant descriptions of the identified phenomenon. Reflexive thematic analysis was needed to analyze the data for this study because it is flexible yet provides a systematic plan to follow. As well, this process is effective for studies where the researchers' subjective knowledge of the content is utilized to collect and analyze data (such as this study). Steps completed to analyze the data are presented in this section, along with a report of the findings.

Important Changes and Updates to Information in Chapters 1-3

Two modifications were approved for this study; both changes were requested by the researcher, to clarify recruitment template wording, and encourage further participant engagement. Firstly, on 5/15/24 the study was formally approved for data collection. The initial recruitment email sent to an email distribution list reaching all potential participants, on 5/28/24; this was delayed due to a scheduled training (5/20-5/24) at the institution, which would impact the availability of participants. During this week, the researcher submitted a modification (approved 5/27) to edit sentence fluency and a spelling error within the initial recruitment email. The initial email was sent to notify participants on Tuesday May 28th.

An additional modification was approved on 6/28/2024, to add an excerpt into the recruitment reminder email template. This modification was deemed necessary because this marked one-month (four weeks) from when data collection begun. Following the recruiting plan identified in chapter 3 (see *Recruiting Plan and Site Authorization* section) the target sample of interview participants had been exceeded as of this point, while only four questionnaire participants had submitted full contributions. The intent of

this modification was to encourage greater participant engagement with the questionnaire.

Preparation of Raw Data for Analysis and Descriptive Data

This section details the steps followed to prepare the collected data for analysis, including descriptions of all data collected. After conducting interviews and collecting questionnaire data, the raw data was prepared for analysis. Preparation of the raw data for analysis was necessary prior to following the reflexive thematic analysis process. In total,18 semi-structured interviews and 35 open-ended questionnaires were collected, totaling 53 participants.

Preparation of Raw Data for Analysis

The first step in preparing the data was to verify the accuracy of interview transcripts; questionnaire transcripts did not require this action as these details were directly submitted by participants. As interviews were conducted audio-visually and transcribed using the Zoom system, producing the transcripts (MS Word format) of each recording (mp4 format). These transcripts were further verified to confirm accuracy of participant statements by listening to recordings and auditorily confirming verbiage used by each speaker. To further verify the content, a copy of the final transcript was sent to each participant (both data sets) via email. This member checking process elicited one response from interview participants and two from questionnaire participants, all of which indicated their acknowledgement. No changes were requested by any participants, nor concerns expressed regarding the data reported.

In the final step of preparing the data for analysis, outliers and incomplete data were ‘cleaned’ (reviewed and corrected or removed) for each data set. A total of 18

interview transcripts was collected, of which none were altered or required 'cleaning'. Of the 35 questionnaires submitted, 6 included responses to the initial 3 background questions only (no additional research contributions provided). These participants are identified using a pseudonym naming scheme (sea animal names) to signify their uniqueness, however, were not 'cleaned' from the data as contributions were still being made (though limited). In total 58 individuals expressed interest in potential study participation; each was assigned a new pseudonym (animal names) prior to analysis to assure accuracy and confidentiality of findings. Five of the participants that started the criteria verification form, never submitted informed consent or further contributions to the study, therefore they were 'cleaned' from the data (leaving 53 participants). In the final step of preparing the data for analysis, all raw interview transcripts were uploaded into MAXQDA.

Descriptive Data

Demographic data was gathered related to participant experiences in academic advising, as well as experience at the institution of record. Most participants (*n=43*) indicated having more than 2 years' experience at the institution of record. Participants reported a combined total of 379.5 years of academic advising experience (average of 7.3 years) and 224.2 years (average of 4.3 years) at the institution. Additionally, 44.2% of participants had advising experience at other institutions, contributing a total of 182.3 years' experience (average of 7.9 years). In total, 17.3% of participants reported having worked in other roles at the institution, with a combined total of 26.9 years (average of 3 years each).

Semi-structured interviews. Interview data was collected between May 31st, 2024, and July 17th, 2024. Participants that initially indicated availability for either an interview or questionnaire were eliminated from interview eligibility after submitting questionnaires. See Appendix I detailing the interview participants, dates interviewed, duration (minutes), and length of transcripts (pages). Interview durations ranged from 45 to 80 minutes, with an average of 62 minutes. Total transcribed pages of interview data ranged from 13.9 to 25.3 pages, averaging 19.6 pages per transcript. All interviewee's answered the three initial background questions, in addition to the 8 interview questions designed to address the research questions for this study.

Open-ended questionnaire. As of June 28th, 2024, the second-to-last interview had been completed, though only 4 fully completed questionnaires had been collected. To boost questionnaire engagement, recruitment materials were modified (see *Limitations* section), encouraging questionnaire participation. In the following 4 weeks of the study, an additional 31 questionnaires were received. See Appendix J detailing the dates submitted, duration (minutes), and length of transcripts (pages) for each questionnaire submitted. Of the 35 submissions received, 6 questionnaire participants submitted responses to the 3 background questions only (no additional research question responses). Participants spent a total of 6,831 minutes on the questionnaires, averaging 195.2 minutes per participant, however, when excluding participant contributions with background-only responses, the total time was 5,427 minutes, with an average of 187.1 minutes per response (29 collected). The average length of responses was shorter than expected, with 1.8 pages per transcript overall (including contributions of background-data only) and 2.0

pages for full transcripts. The exclusion of background-only data reduced the total transcript length from 63.1 to 57.2 pages.

Data Analysis Procedures

How remote academic advisors, at a state-affiliated public intuition in the Middle-Atlantic states describe facilitating transformations in graduate-level leaners' perspectives, was the focus of this research. To investigate this phenomenon, two research questions were assessed:

RQ1: How do advisors decide 'when' and 'how' to transform a learners' perspectives?

RQ2: 'What is involved' in facilitating transformations in graduate-level learner perspectives?

Described in this section are the six steps of the completed reflexive thematic analysis process, including exercises used to better interpret, organize, and refine final categories and themes from both data sets. Reflexivity protocols applied to data collection and analysis are also reviewed in alignment with when different activities were completed. Both data sets were analyzed according to the reflexive thematic process (introduced by Braun and Clarke), following the steps outlined within the proposal (chapters 1-3).

Reflexivity Protocol

Throughout data collection and analysis, the researcher kept a reflection journal in a password-protected MS OneNote workbook, noting thoughts, feelings, and observations on individual participants as well as broader reflections across data sets. Initial patterns and potential themes were recorded, such as where questionnaire responses lacked the clarity seen in interview data, making these transcripts more challenging to interpret. It was also noted that reading the transcripts aloud helped clarify

meaning and improve the accuracy of interpretations. The text-based format of questionnaire data contributed more concise and structured statements from participants than the interviews. As a result of the journaling process used, analysis was completed quicker but required careful attention to detail, due to the distinctions made in written language used. Throughout the study reflection journaling helped identify key themes and categories present in the findings, while also recognizing how personal biases and experiences influenced the interpretation and analysis of the data.

Data Analysis Steps

Six steps in a reflexive thematic analysis process were used to analyze the interview and questionnaire data separately, before combining them into one dataset for interpretation. This process began with familiarization (1), initial coding (2), and initial category and theme identification (3) across interview transcripts. Then the same steps are repeated with the questionnaire data (4), before synthesizing categories and refining themes (5) for both the combined data set. Finally, the definitive themes for each research question were refined, defined, and named (6). How each step was managed is detailed in the following section.

Getting Familiar with the Data (Step 1). To begin gaining familiarity with the data, the 18 transcripts of interview data were uploaded into MAXQDA. In alphabetical order (by initial pseudonym) each transcript was read, and notes taken regarding observations and perceptions. Significant patterns in participant speech were noted, such as the frequent use of filler words like "you know" and "if that makes sense," to emphasize a point or transition between thoughts. Some words also clearly addressed distinctive components of this research (i.e., “student”, “classroom”), while others had to

be reviewed for deeper meaning and context (i.e., “change”, “graduate”) due to different potential meanings. Participants also contributed stories (from personal and student reference), used mock conversations as examples, and provided metaphors and imagery to explain more complex concepts. The analysis of participants' language patterns, including the use common words and phrases, provided valuable insights into participant perspectives. This process helped to clarify the meaning behind key concepts and deepen the understanding of learning perspective transformations.

Repetition of different terminology was noted during familiarization as it added context for participants’ cognitive processing. Interview participants, frequently repeated words in succession, or throughout statements, which highlighted key themes and emphasized important concepts. As one interview participant contributed, “I want to be a a and a classmate who who provides information and an experience for for my colleagues, for my for my fellow classmates, and then for the professor” (Lion). When compared with the audio recording of the interview, this participant’s statements were accompanied by emphatic body language and facial expressions, suggesting that the individual was processing their thoughts and selecting the appropriate response. Pronouns were also used as a tool to momentarily delay the flow of conversation, such as "they," "she," and "he," occurring when interviewees paused to organize their thoughts or decide how to continue. Another interview participant (Bear) stated, “keeping in mind that there will still be some some critical data points that will require follow up from the coach”, using repetition of ‘some’ to connect critical future data points. These verbal pauses, though sometimes resulting in unclear or disconnected statements, were also opportunities for participants to better expand on their thoughts.

Other common patterns noted during familiarization included stories (from personal and student reference), mock conversations, and metaphors and imagery. Every participant in the interviews contributed at least one story of student interactions, explaining their approaches, or justifying their decision-making. Examples of stories varied from experiences of the advisor as a person, or in reference to their interactions with or previously shared by students. While some examples described the outline of a conversation or an intended approach only, in other examples the participant provided a back-and-forth dialogue as example. Additional details using metaphor and imagery were helpful to interpret meaning from these mock conversations as they clarified approaches used and often informed of the intent towards transforming a learners' perspective. These examples provided a clear understanding of what occurred during prior advisement scenarios and emphasized how the participant expected learners to react in future situations. While some participants provided examples more subtly, others used this space to talk out internal thoughts and perspectives. These communication patterns were noted for their use to explain more complex concepts like learner tone, verbiage, and questioning of decision-making.

Initial Interview Coding (Step 2). To ensure an organized and unbiased analysis, a color-coded tagging system was applied to each transcript via MAXQDA, organizing data segments related by unique components of each research question. Blue tags were used for advisor-centered responses (i.e., "I made a decision"), green for student-centered responses (i.e., "the learner decided"), and a mix of blue-green tags for shared actions (i.e., "we discussed a plan"). Red and orange tags highlighted themes of transformation (i.e., "taking steps forward") and resistance (i.e., "taking a step back"), while purple tags

were used for procedural or policy-related codes (i.e., "schedule of classes tool"). This system helped visually differentiate between significant aspects of participant experiences and ensured a reflexive, objective analysis. Background questions were further tagged in yellow to distinguish them from other responses. This consistent approach helped the researcher separate advisor and learner perspectives, while focusing analysis on the data relevant to the research questions.

Each interview transcript was reviewed individually. However, after completing the initial coding for the first four transcripts, each was reviewed a second time to confirm that all applicable codes had been identified. This exercise reinforced the efficiencies used to apply codes to the data, as it confirmed the accuracy of the prior review and application of codes to the segmented data. After sure of the coding process followed, remaining interview transcripts were reviewed alphabetically (by pseudonym). Coding with the purpose to identify participants' meaning and intent was important for analyzing this research because it ensured that data was accurately categorized and interpreted in a way that aligns with the research objectives. Initial coding focused on the content of what was being said rather than the structure of the sentences, as interviewee statements were informal and did not adhere to conventional sentence writing structures. This approach allowed for a more direct approach to applying codes to the data, which better examined how various segments (i.e., individual phrases, multiple sentences, etc.) of the interview data contribute to the overall analysis.

Initial Interview Codebook. For the total interview data set, 19,064 segments of coded data were identified, averaging 1,059 codes per transcript (18); see Table 1 listing the total coded segments per interview transcript. At 1,466 segments of code the

interview transcript with the longest transcribed pages (Horse: 26) totaled 624 more segments than the shortest transcript (Sloth: 14) at 842 segments of code. The interview transcript with the least coded data at 765 total segments was 20 pages transcribed, which is greater than the median of 19.3 pages across all interview transcripts.

Table 1

Total Coded Segments Per Participant (Interviews)

Participant	Coded Segments
Horse	1,466
Tiger	1,463
Giraffe	1,458
Kangaroo	1,248
Wallaby	1,158
Squirrel	1,107
Bear	1,094
Racoon	1,081
Hippo	1,067
Jaguar	1,049
Quokka	1,000
Rabbit	933
Mule	871
Reindeer	857
Sloth	842
Wolf	833
Lion	772
Fox	765
Total	19,064

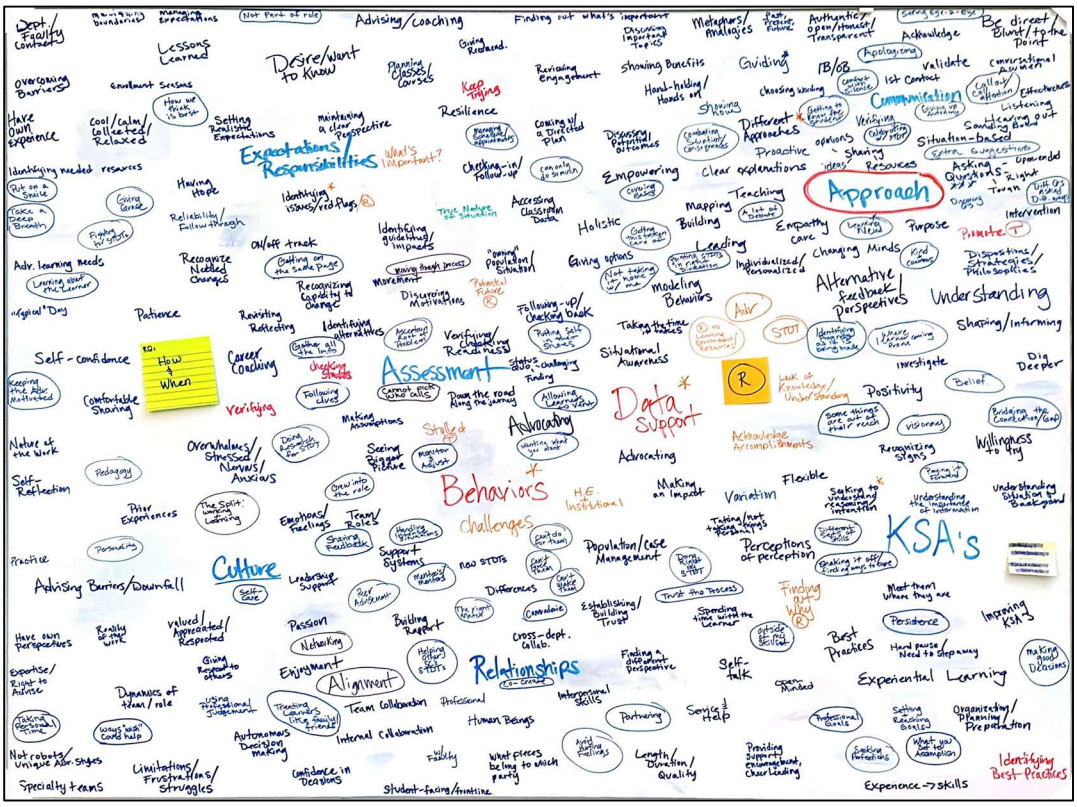
Developing Initial Interview Categories and Themes (Step 3). In the third step of analysis, the segments of coded interview data were organized into initial categories, then synthesized into initial themes. Using tools (MS Excel and Word) to examine the frequency of individual terms as well as combinations of word phrases, similar codes were clustered together to identify potentially significant categories. Throughout this

process, the formation of categories provided structure to organize and interpret the large amounts of qualitative data collected across interviews. To better visualize this data, a word matrix was created using large whiteboards to visually map out common terminology across the code system. After these exercises were completed, the researcher had an initial list of categories representative of the interview data. Using this list, clusters of related categories were refined and synthesized into initial interview themes.

Analyzing the frequencies of different words or phrases participants used provided valuable insights into the interview data. Key patterns and themes were identified by analyzing how frequently different coded topics were discussed by participants. Terms and phrases used by participants across 10 or more coded segments were clustered into potential categories. Exploring both frequencies of individual words and combinations of word-phrases helped highlight how codes relate in meaning. A word map was used to visually organize the data and identify relationships between key terms, helping to create accurate categories (see Figure 1). Similar terms, such as “transform,” “change,” and “grow,” were grouped together to highlight their associations. The terms were initially written in smaller print and then enlarged to emphasize frequency. New concepts, like “building rapport,” were placed near related terms, such as “relationships.” Asterisks and circles were used to highlight potential codes and significant categories. This visual map helped in identifying clusters of related codes and effectively organizing the data for the grouping of accurate categories. A total of 283 terms were integrated into the matrices.

Figure 1

Word Matrix: Interviews



Initial Interview Categories and Themes. In the end of the third step, identifying accurate categories was crucial due to the size and complexity of the interview dataset; see Appendix K. This required the creation of more manageable and meaningful groupings of data by individual research question. As an example, coded segments related to "teamwork" were grouped together, while codes linked to "relationship management" were placed in a separate category. Though both were connected by the theme of advisors' efforts in "making a connection" with learners, they represented different participant perspectives. These categories helped with the grouping of similar ideas and responses for each research question, making it easier to spot patterns and

trends. This organizational structure ensured a systematic analysis, with each category being well-defined and supported by data.

In total, 71 categories were identified and organized by research question (36 for RQ_1 and 35 for RQ_2). The identified categories and themes were set aside for future reference as the next data set (the questionnaires) were analyzed. Some segments led to more developmental categories, such as ‘vision,’ ‘precipitating events to start,’ and ‘finding their why,’ which were grouped under the theme ‘learner’s why.’ Other categories, like ‘happy path,’ ‘price of entry,’ and ‘resistances,’ were placed under the theme ‘academic progress’ due to how they impact a learning process.

The final step of organizing the data into initial themes required analyzing the patterns in participants’ experiences. Using the categories identified, the common challenges and strategies participants shared for facilitating transformation in learner perspectives were noted. As commonalities were noted across the 71 categories, groupings were organized into 22 themes (see Figure 2), with no outliers. Each theme was confirmed as accurately contributing to one or both research questions for this study. While not organized by research question, how each theme addressed a research question component was evaluated, confirming the accuracy of this initial list of interview themes.

Figure 2

Initial Interview Themes

1: Naming the Problem	12: Making a Connection
2: Data-Responsive	13: Academic Progress
3: Conversational Acumen	14: Coaching Dispositions
4: Tribal Knowledge	15: Career Matching
5: Reinforcement	16: Enablement
6: Assessment	17: Purposeful Reflection
7: Discovery	18: Learners "Why"
8: Opportunity	19: Advisors Experience & Development
9: Intervention	20: Accuracy & Follow-through
10: Relationships	21: Advisor Support Systems
11: Resource Matching	22: Learner Readiness

Initial Questionnaire Codes, Categories, and Themes (Step 4). In the fourth reflexive thematic analysis step, the initial steps taken to analyze interview data were repeated for all questionnaire data. Initial familiarization was first, followed by coding of the data, and identification of initial categories and themes. After the 35 questionnaire transcripts were uploaded into MAXQDA, they were organized alphabetically by participant pseudonyms. A notable dynamic of the questionnaire data (as compared to the interview data set) was how responses were more directed, containing abridged language and well-organized statements.

Understanding how participants used language to convey meaning was a central focus of this study, as it provided valuable insights into advisors' perspectives. The thought processes and ways in which advisors framed their experiences was valuable for addressing the identified phenomenon. After all transcripts were reviewed thoroughly, codes were applied to notable segments of data. From all 35 questionnaire participants, 6,339 segments of total codable data were identified, including 88 codes applied to the 6 transcripts contributing background-question answers only. See **Table 2** detailing the total coded segments per questionnaire transcript. There was significant variability (444

coded segments) between the least total coded segments in a transcript (12) and the most (456) total coded segments.

Table 2

Total Coded Segments Per Participant (Questionnaires)

Participant	Coded Segments
Hedgehog	456
Zebra	431
Hyena	377
Sheep	369
Armadillo	326
Platypus	316
Skunk	281
Possum	264
Panther	252
Rhino	244
Deer	244
Elephant	234
Lamb	219
Turtle	212
Ostrich	209
Cow	206
Walrus	193
Monkey	192
Bat	189
Mouse	182
Baboon	145
Whale	125
Koala	121
Cheetah	113
Goat	92
Gorilla	91
Chipmunk	84
Antelope	47
Lynx	37

Due to the way written responses were submitted in the questionnaire data set, reflections at this stage revealed that less subjective thinking was needed to confirm relationships between participants' statements and their meanings. Contributions were more straightforward and when needed, intent was clearly explained. One questionnaire participant exemplified this in stating “dialogue with students to determine their roadblocks/areas of concern” was important to their role. This statement indicated the participant interacts (“dialogue”) with learners to determine barriers (“roadblocks/areas of concern”). As the participants exact words were used more frequently when naming codes in this data set, meaning for individual and combined terms participants used had to be evaluated to identify how different codes may be related. By reflecting on the meaning and potential application of each word or phrase, it was more manageable to organize and interpret initial category development.

In the Rocketbook® reusable notebook system (see Figure 3), a word matrix was made noting all codes with five or more segments applied. The benefits of this notebook were having an erasable system to duplicate efforts made during interview analysis. Most frequently stated terms across codes were visually identified (occurrences of four or more segments) and new words were added near related terms already in the matrix. Since the codebook had been sorted alphabetically by codename, it was easier to identify sections of related terms, however each had to be reviewed individually as this was not always the case. Rates of mentions across transcripts were then searched and encircled on the word matrix to indicate significance. With further review of the data, it was noted that six additional topics stood out in the coded segments as significant at this point: “I tend to…”, “understanding desire vs potential outcomes”, “who, what, when, and where”,

"advisement despite obstacles", "sometimes/some…", and "understanding issues can have root causes".

Figure 3

Word Matrix: Questionnaires



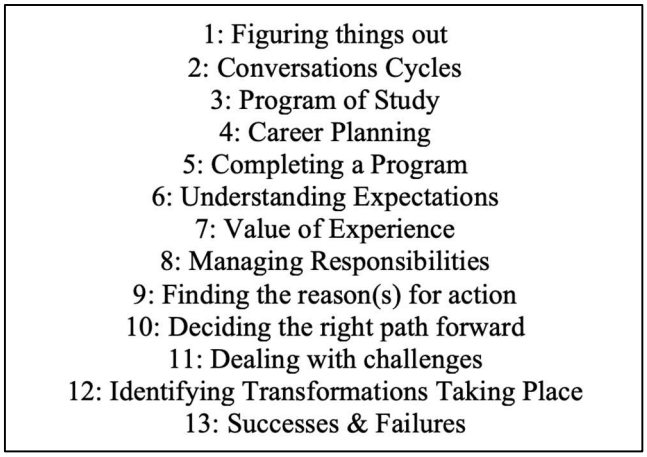
Initial Questionnaire Categories and Themes. Following similar procedures as with the prior data set, initial questionnaire categories and themes were assessed after reviewing the codebook for this data set. After completing this review, clusters of notable codes and terminology was organized by the context they contributed to the research. Questionnaire categories were formed by clustering related codes to organize the data into meaningful groups reflecting common participant references and statements. Codes were grouped based on significant terms that showed clear relationships, helping to identify trends and connections across the transcripts. Illustrating how specific concepts were represented across the dataset, 116 codes were clustered together under the category

of "finding the right program of study." The coding process laid the groundwork for further analysis, where categories would be organized into overarching themes.

Due to the experience gained from the process to apply initial codes, and identify categories and themes, questionnaire data was more efficient to code than the prior data set had been. Each category was written on a piece of paper and rearranged into related groupings until 13 initial themes were identified, representing the lifecycle of the advisor-learner relationship. This process was more linear than the interview data analysis, though the researchers' first-hand knowledge was crucial for identifying relationships and correlations within the themes. The final themes were organized in a general order reflecting their occurrence throughout the advisor-learner relationship lifecycle. An initial list of 66 categories (see **Appendix M**) list of categories by theme) was synthesized from clusters of similar codes, 25 identified as directly addressing RQ_1 and 41 addressing RQ_2. The significant difference in these totals was noted though not concerning as data sets still needed to be synthesized. From this list of categories, a total of 13 themes (see Figure 4) were organized.

Figure 1

Initial Questionnaire Themes



Synthesizing Categories and Refining Themes (Step 5). In the fifth step of analysis, both lists of categories and themes were reviewed and synthesized. The patterns of meaning in terminology used were noted, as these details continued to inform impressions of final categories and themes for the research. As both codebooks and lists of categories and themes were reviewed, significant terminology was noted, including words and combinations of words (phrases) that occurred frequently across in both data sets. Performing this review also helped clarify the common terminology used to explain participant knowledge and address the research questions. Each participants' way of speaking (their tone and language choices) was unique but addressed common experiences and approaches to dealing with learning challenges.

Understanding this data to be significant, a list of final categories and themes was organized. Across the total 53 participant transcripts of interview and questionnaire data reviewed for this study, 25,403 coded segments were identified. In the remainder of this section the processes used to synthesize categories and themes is further discussed. Prior to this, the two codebooks were combined in MS Excel and organized into clusters of related concepts. As these clusters of code were identified, initial categories and themes were noted. By reviewing the combined list of coded segments from both data sets, it was easier and more effective to identify a synthesized list of categories and themes representative of participant responses to the research questions.

Categories. An initial list of 137 total categories was organized from the synthesized codebooks. The first way this data was sorted was by total frequency, then again by ranking the percentage of documents with each word from highest to lowest (rate each participant stated).

From the list of 137 categories, it was noted many were significantly related (i.e., ‘career related’ content across both data sets) and others expanded upon one another (i.e., ‘active listening’ and ‘conversational skills’). A total of 37 words were used in all 53 transcripts; these terms were significant because they confirmed the validity of themes generated, after both datasets had been merged. To ensure the quality and meaning of participants contributions was upheld throughout the synthesis process, each of the 137 categories was treated individually. The frequency of each reported term across total transcripts was referenced in addition to total code mentions per transcript (# and % of total participants). Understanding these rates was important as this information outlined shared concerns for participants.

Recurring terminology was significant to category synthesis as these shared experiences and approaches informed both research questions directly. The most significant recurring category related to the “student” and/or “learner”, which was mentioned by participants at rates of 2903 and 786 respectively; as the subject matter for this study, this was expected. The terms “perspective” and “transform” also occurred across all transcripts at a rate of 729 and 413 times. The term “change” was noted across 53 transcripts, at a rate of 374 times, in addition to the 413 occurrences of “transform” which were mentioned 321 times across 52 transcripts (98.11% of total). All terms reported higher than 50% other than 1 (“barrier”); 9 of the 14 terms were prevalent across all 53 transcripts, with an additional term (“asking”) was represented across 50 (94.3%) of participants. “Barrier” occurred 23 times across 12 transcripts, for a rate of 22.6%. Understanding the frequency of terminology used across datasets was important to this research because it informed of a united language and knowledge used by participants.

Themes. From the synthesized list of categories (137), a total of 32 themes were initially identified as addressing the research questions for this study. To better visualize this data, the full list of categories was printed on paper and cut into individual strips. These papers were physically moved around on a table until fully grouped into related themes. Assessing each grouping of categories as if an individual theme, correlations were noted and used to identify final representative themes for the combined dataset. As a result of this exercise, a final list of 32 themes was identified representing the data set. It was also noted though that some categories might be further refined depending on how they positioned the research questions. See Figure 5 outlining an alphabetical order list of the final themes identified addressing this research; the full list of categories (137) was organized by these total themes.

Figure 5

Final Synthesized Themes

Accurate identification of needs vs wants
Advisement ecosystem
All people are different people
Asking questions
Career planning and program identification
Checking the boxes
Conversing with an open perspective
Developing a professional identity
Discovering the learners "why"
Engaging in conversation
Following policies and established processes
Framing the reality of the situation
Gaining experience
Goals or vision for the future
Having a pathway to completion
High value impacts on the ability to transform
Identification of barriers to progress
Identifying the true nature of the situation
Implementing progressive interventions
Improved KSA's
Interfacing within the online environment
Management of responsibilities
Navigating program dynamics
Owning academic success
Progression through a program
Reflection on events
Relating to the learner as a human being
Resistances taking place
Resources to aid the learning process
Transformed perspectives
Tribal knowledge
Understanding what brings the learner to you

With the unique characteristics attributed to each theme, related to the meaning of representative coded segments, it was important to review and justify each theme at this time. The terms were listed in alphabetical order, allowing for an objective review of the data. Due to the organization of these themes, it was easier to identify how each addressed individual aspects of one of the research questions. A notable 18 of the 32 themes began with some form of verb tense to indicate an action occurring as part of the advisement process. This information was used when analyzing the activities involved in facilitating learning transformations (both RQ1 and RQ2). The prevalence of themes following distinctive in-the-moment (addressing RQ1) or occurring-over-time (addressing RQ2) patterns was clear; related content to each research question was important, as this information was used to create the finalized list of themes.

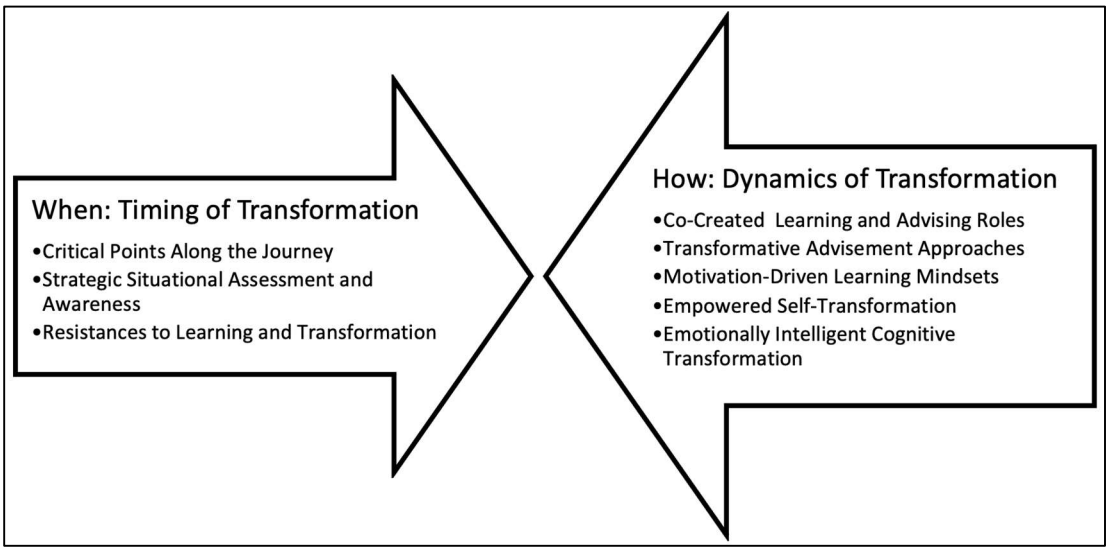
Refining, Defining, and Naming Themes (Step 6). A clearer understanding for the common themes significant to each research question was required during this final (6th) step of analysis. To better visualize the accuracy of identified themes, the list of synthesized categories (137) and themes (32) was reviewed, along with reflection journal notes. These exercises allowed for an objective review of the themes, allowing for more accurate identification of a final list representative of the research questions. After this review, a final list of 23 themes was identified, including 8 which address RQ1 (3 addressing ‘when’ and 5 addressing ‘how’) as well as 15 themes which outline the ‘steps involved in transforming learners’ perspectives (RQ2). This information was further defined and named to ensure clarity of reporting. In this section the steps taken to provide this clarity and finalize analysis are described, including how different themes were revised. After review of reflections and confirmation that the synthesized list of themes

was representative of the research data collected, final research themes were refined, defined, and named; these processes are further outlined in the remainder of this section.

Refining Themes. Using the research questions as a guide, themes were reordered more effectively. See Figure 6 indicating the eight themes identified as addressing components of '*when and how an advisor decides to transform a learner's perspectives*' (RQ1). These themes are divided by three themes addressing the 'when' ("timing of the transformation") and five themes addressing the 'how' ("dynamics of transformation") this decision-making process occurs. Themes describing the "timing of transformations" included 'critical points along the journey', 'situational awareness', and 'navigating resistance'. These three themes emphasize the specific time (when) a participant may decide an intervention was necessary, to transform a learners' perspectives about something. Then, additional themes were identified to address 'how' advisors decide to facilitate these transformations; these "dynamics of transformation" include 'openness to transformed perspectives', 'experience and practice', 'motivation and mindset', 'empowerment and autonomy', and 'emotional and psychological factors'. Each component of this list contributes a significant dynamic to the process of transforming learners' perspectives.

Figure 6

RQ1: When and How Advisors Transform Learners' Perspectives



Also see Figure 7 listing the six groupings of themes identified as addressing RQ2: *the steps involved in facilitating transformations in learners' perspectives*. The 15 themes identified were grouped by the six stages of an advisement where they might occur. Included were themes of, "reasons for engaging", "asking questions" and "listening", which4 are all forms of 'initial engagement' with a learner. Each 'stage' in the advisement conversation (A-F) includes unique component themes which mark the participants' focus as part of the process to transform the learners' perspectives. Following 'initial engagement' (A) are additional conversational steps of 'reflection and reassessment' (B), which would be done prior to 'planning and strategy development' (C), and followed by 'implementation of interventions' (D), then 'continuous support and follow-up' (E), ending with 'assessment and feedback' (F). This process can also be viewed cyclically, as a process with a logical beginning and end that flows back around and starts over again with each new interaction.

Figure 7

RQ2: Steps Involved in Facilitating Transformations in Learners' Perspectives



Due to the flow of conversation outlined in these six groupings, it was necessary to address both the structure and meaning of themes addressing RQ2. Some themes included more rigid applications for addressing the research questions; examples of this included ‘empowerment and autonomy’, ‘identification of barriers/challenges’, and ‘asking questions’. Other categories were regrouped into revised themes (i.e., ‘emotional and psychological factors’ and ‘providing feedback’, etc.). Confirming the validity of each grouping of themes addressing this research question, the final list of themes was confirmed as accurate.

While the refined list of themes was organized by research question, further subdivisions provided context for this research. In RQ1 there was a clearly defined division between ‘when’ and ‘how’ the decision-making process occurs, informing of a set time and place where these interventions might be expected. While RQ2 outlined a cyclical process to be followed across 6 groupings (phases) of themes. The final list of themes was refined using recurring ideas, experiences, and key insights shared by participants across data sets, providing a comprehensive understanding of their experiences.

Defining Themes. To better understand the meaning of each theme as it contributes to this research, the list of 23 refined themes were further defined. Each definition was used to capture the intent of a theme and express its meaning as part of the advisement process to facilitate transformation in learner perspectives. Initial drafting of theme definitions was done by making subjective reflections of the data collected. This process required further review of the terminology used by participants, to prevent researcher bias and ensure accurate reflection of the characteristics of significant importance to each theme. How individual themes related to the research questions was also considered during this initial drafting of theme definitions. These were short, concise definitions that addressed the meaning of each theme but did not provide much context.

To add clarity and enhance the quality of this process, each theme was entered into an artificial intelligence (ChaptGPT) system and asked for ‘a definition in the context of academic advisement relationships’ as a prompt. Initial definitions for each theme were included to provide further context for this system to generate a concise definition. This process resulted in longer definitions but did not fully capture the

meaning expressed by participants within this study. To further refine these definitions, significant aspects of both generated versions (researcher and ChatGPT) were synthesized. The result of this process was a final dictionary of terms related to the study was organized. See **Appendix M** to review the full list of final definitions identified for all 23 themes.

Naming Themes. With accurate definitions refined in the prior step, creating an accurate naming convention for the identified themes was also important. The naming of these themes was not merely a descriptive act but also a conceptual one, which required drawing upon existing theoretical frameworks of advisement while also allowing for the introduction of new insights. To capture the accurate central meaning of each theme, the related categories and segments of code contributed by participants were reviewed as part of the naming process. Drafting accurate, comprehensive names for each theme required finding the right balance in terminology and word combinations to capture the full scope of participants' meaning. In the process of naming the themes, the need to expand beyond merely descriptive details was recognized, especially as the identified themes were more conceptual than tactile.

An initial draft was created using notes and reflections from the study. This researcher-generated draft included the same terminology used in the definitions for each and did not differ much from the working titles that had been used to label each theme to this point. To objectively improve the quality of each theme name, the ChatGPT system was used, with the prompt to 'create a clear, concise name' for these details. Results from this AI-generated review were recorded along with the prior list drafted by the researcher. Then, the two names were compared and evaluated for the ability to relay meaning and

intent representative of the data. Finally, a unique and identifiable naming scheme was refined for each of the 23 themes.

Results

Presenting the Results

The results of the process followed to analyze the data for this qualitative research study are presented in this section. This study sought to understand how remote academic advisors at a state-affiliated public intuition in the Middle-Atlantic states, describe facilitating transformations in graduate-level leaners' perspectives. The two primary research questions were used to investigate this phenomenon:

RQ1: How do advisors decide ‘when and how’ to transform a learners' perspectives?

RQ2: ‘What is involved’ in facilitating transformations in graduate-level learner perspectives?

The first research question focused on moments in time or events as they were occurring, where the second research question outlined a long-term process taking place over time. The latter also described a systematic process taking place where advisors would intervene with and provide individualized support to learners throughout the academic journey. Together these research questions address the purpose of the study, to understand the experiences of advisors as they facilitate transformations in learner perspectives across the student lifecycle.

Orienting the Data: Background Questions. Participants were asked three background questions to assess their experience for contribution to this study. The questions included ‘how often participants interacted with graduate-level learners’, ‘whether they changed strategies across learner levels’, and ‘the degree of autonomy they

feel when making decisions'. These background questions contributed foundational information allowing for a more comprehensive exploration of the findings. To understand 'when and how' an advisor might decide to transform a learners' perspectives, these background questions informed of the experience that informs their decisions, as well as the degree of autonomy to independently decide what advisement is needed. Each question aided in the interpretation and analysis of the research data by providing context to understand the scope and extent of participant responses.

To the first background question was used to understand how much direct contact with graduate-level learners each participant had in their current role; it indicated most participants (88.7%) experienced frequent (at least monthly) contact, though 35 total participants (66%) made statements informing of weekly or daily contact with this population. The second background question, 'do you change your strategies when working with graduate learners versus undergraduate learners?', was also important for orienting the results from this data. Noted patterns include 'frequency of yes/no answers' and 'separation of strategies vs approaches'. Understanding participant autonomy was also important to this research because it explained how they exercised professional judgment and tailored their guidance to each learner's unique needs and circumstances. Each of the 53 participants contributed a response of some kind; no respondents indicated they do not have autonomy, or that the autonomy they have is insufficient. This information helped orient participant responses to the research questions, by clarifying the generally advisor-driven decisions.

RQ1: When and How Advisors Transform Learners' Perspectives

The first question this research investigated was 'when' and 'how' academic advisors decide to transform a learners' perspectives about something. Participant contributions addressing this research question indicated the transformation of a learner's perspective typically happens over time and through a variety of advising interactions. The timing and milestones identified as dependent on the context, the nature of the learner's goals, and the relationship between the advisor and the learner. While 'when' the decision to facilitate a transformation takes place was a matter of timing, 'how' this decision takes place involved recognizing both planned and unexpected milestones occurring along the academic journey. Eight total themes synthesized from the data collected for this study addressed this research question: three indicating 'when' and five indicating 'how'.

Though all participants (*n=53*) contributed to the total synthesized list of themes, the exact number of interview (INT) and questionnaire (QST) participant contributions to each theme was harder to isolate. Every interview (*n=18*) and questionnaire (*n=35*) participant contributed to the identification of themes. However, due to the subjective nature of this qualitative descriptive research different participants described similar experiences, using unique explanatory detail. As a result of this, participant experiences had to be further reflected upon, acknowledging the researchers potential biases during interpretation. While every interview (*n=18*) and questionnaire (*n=35*) participant contributed to the identification of themes in some way, each section below informs of how frequently each theme was noted by participants.

When: Timing of Transformation. The first part of this research question seeks to understand 'when' advisors might decide a transformation in learners' perspectives is necessary. Three themes described this 'timing of transformations' and outlined the presence of different academic or professional milestones, including 'critical points along the journey', 'strategic situational assessment and awareness', and 'resistances to learning and transformation'. These themes represent significant shifts (transformations) in learner perspectives when they are most likely to occur during a learner's academic journey. Each of these themes indicate opportunities for intervention, to act on behalf of or in coordination with a learner.

When thinking about 'when' participants described intervening with learners, the 'timing of these transformations' suggested approaches were situational and individualized. The initial process of identifying when to engage with learners was indicated as requiring a pathway of the 'critical points' individual learners will follow. 'Situational assessment and awareness' are indicated as providing further significance because this theme emphasizes the need for both the advisor's awareness of their own capabilities and needs, as well as awareness of the learners' capabilities and needs. Additionally, participants indicated transformations often involved some form of 'resistances to learning and transformation' taking place, which then needed to be navigated or understood. Together, these three themes contribute to the understanding of 'when' an academic advisor might facilitate a transformation in learners' perspectives. See **Table 3** below outlining these themes, a description of each, and examples of how evidenced in practice.

Table 3

RQ1: "When" Themes: Descriptions & Examples

Theme	Description	Example
Critical Points Along the Journey	Identifying key moments in a learner's academic journey	Challenges occurring, program milestones, or major transitions
Strategic Situational Assessment & Awareness	Recognizing specific circumstances prompting reflection	Unexpected grade or feedback, major life changes, or nearing graduation
Resistances to Learning & Transformation	Identifying and addressing learners' resistances	Disagreement or push-back related to policies

Critical Points Along the Journey. References made identifying key moments in a learner's academic path where perspective shifts are likely (i.e., during challenges, milestones, or major transitions) were noted. All interview (*n=18*) and the majority (*n=29*; 82.86%) of questionnaire participants discussed some form of critical point along the learners academic journey. Included data emphasized institutional guidelines, advisor schedule availability, and learner activities were all significant ways of identifying critical points for learner perspective transformation. These strategic moments were used to determine when learner interventions would have the greatest benefit. Each critical point represents an opportunity where participants worked with learners to reflect on their strengths, weaknesses, and evolving goals. These milestones were commonly noted by participants when describing when to transform a learner's perspectives and were indicated as representing significant opportunities for their growth.

Interview (*n=12*) and questionnaire (*n=22*) participants indicated the institution has influence over the development of progressive milestones along the learning journey. These contributions indicated perspectives related to what milestones are critical for advisors to focus on with learners and when appropriate to intervene. For example, one participant (Tiger) indicated

> From like a data perspective, it's transformative to see a student move from, I'm getting an outreach campaign for them every week, because they're clearly like struggling in class. To having those great conversations and seeing them fall off of those campaigns. Meaning that they have moved into a bucket where they are on track to be more successful.

This structure of following learner activities was noted throughout the data. Additionally, another interview participant (Bear) further contributed to this topic:

> So that's done through campaigns, through call campaigns and outreach campaigns where we, we essentially tell coaches which students need them. Based on critical data points within the classroom. So a student who is failing assignments, or a student who hasn't logged in as frequently as their peers. Perhaps not at all. So we do tell student coaches that they need to interact with those students.

Both statements confirm the presence of direction provided by institutional leaders, to establish ‘critical points’ of reflection for advisors to follow. These milestones are generally organized along the learners’ academic journey or initiated as a reaction to learner performance.

As participants continued describing when they would attempt to transform a learner’s perspectives, their daily workload of tasks became an important factor. As explained by one interview participant (Hippo):

> I have a certain period of the day where I'm getting calls coming in, and so I don't really have a choice, you know, in in that regard of who I talk to at those points. When you know I have my own student outreach or student engagement time

> where I can make my own outreach. Obviously, I'm able to determine you know who is best for me to reach out to. Obviously we have our assigned campaign, certain students that we are expected to call for specific reasons. But then, beyond that, I'm able to determine to a pretty fair degree, you know, who is who best needs my help at that point.

In these statements the participant explains what they reasonably expect to be their daily tasks and when they expect to have time for different interaction types. This was further supported by questionnaire contributions, as indicated by one participant (Possum) “my team is really focused on letting us speak our own voices, guided by the other requirements the institution has for us”. These examples further highlight the challenge of deciding what is important to focus on, when attempting to manage their student populations.

Graduate-level learners were identified by participants (INT=5 and QST=9) as having a major impacting milestones related to their total time to completion. An interview participant (Tiger) indicated advisors are “going to make sure that we're very individualized and meeting those needs throughout their journey”, indicating that advisors encourage self-reflection and self-assessment throughout a learners’ program. As a questionnaire participant (Chipmunk) further contributed, “students may have to adjust their expected time to completion”, indicating potential solutions when students run into barriers to their academic progress. Another questionnaire participant (Baboon) indicated that the institution required graduate programs be completed within a set timeline, to prevent potentially retaking courses, providing the example approach “I advised them they were at the 5-year timeline”. This was also supported by other

interview (*n=1*) and questionnaire (*n=2*) participants as a critical benchmark used to help learners progress quicker towards a goal, while also understanding policy impacts where applicable.

Strategic Situational Assessment and Awareness. Strategic situational assessment and awareness is another theme indicated as used by advisors to recognize specific circumstances that prompt reflection. All interview (*n=18*) and the majority of questionnaire (*n=29*) participants mentioned a strategic situational assessment made when interacting with learners. Concepts related to the processes advisors used to assess and influence learners' awareness of what is necessary to achieve academic success were included. Notable contributions to this theme related to the evolution of advisement practices, recognition of learner transition points, increasing learner awareness, and acknowledgement of times when facilitating transformation might be avoided. By acknowledging that individual learner situations are all different, participants described offering tailored guidance that fosters connection and understanding between advisor and learner.

The data collected indicates academic and professional environments are constantly evolving. In a questionnaire response, it was noted "I am constantly evolving my advising skills and learning from my students and my peers about how to be a better advisor" (Platypus). This data supports the benefits of adapting advisement strategies based on the individualized assessment of learner needs. As explanation, an interview participant (Jaguar) contributed, "I think just their self-awareness like, although it caused them to have self-doubt. I do still think that was important, though, because that is something that some students don't realize later on due to excitement." This indicates

self-awareness is not only recognizing when things are changing but also responding strategically to maintain progress and achieve goals.

Some participants (INT= 7; QST= 6) supported the understanding that during times of frequent transition, strategic situational influences can play a pivotal role in how an individual makes their decisions. During an interview one example of a time of learner transition was provided (Fox):

> Your decisions are going to be significantly different at 19, having no, no academic background, no significant. Oftentimes not significant professional experience and are still very much in the early stages in life in adult life. Versus somebody who may be perhaps midlife, and has teenagers at home, and has worked either in in whatever type of career, and had those adult experience further along, and they're presumably adult experiences and maybe even academic ones.

The different transition points across a person's lifecycle are noted by this participant as directly contributing to their decision-making strategies and quality. An indication taken from this data is different situational and experiential perspectives contribute to individual learners' decision making. Added support from another interview participant (Quokka) indicates:

> I think it's just me. And so I show up to this job, and I am myself. And I think I that allows me to do my best work, cause I show up any in myself. And I can recognize that about myself.

This participant expresses the importance of meaningful self-reflection, summarizing the recognition that all situations are different and should be treated as such during advisement.

Increasing learner awareness was another important contribution made to this theme. Data indicated participants' central focus on the need to promote action out of a learner, which guided their own actions and responses to learner situations. As an example, one participant questionnaire (Skunk) contributed:

> If it is a situation where a student seems to lack awareness of their issue(s) leading to lack of success in their courses, I may need to take a more active role in helping them transform their perspectives – they may be less apt to do it on their own.

With this explanation of their intended approach and rationale, the participant indicates the same approach may be useful though individual learner situations are different. As another questionnaire participant (Mouse) indicated "academic issues, financial obligations and personal issues such as health are all situations in which a student may need to change their perspective." The data informed each of these situations require awareness for the unique needs of the learner and potential for different outcomes, based on their individual challenges and opportunities.

Lastly, participant contributions also indicated potential circumstances where transformation might be avoided. As part of research questions asked of both data sets (*n=53*) the researcher identified 'when' advisors might avoid transforming a learner's perspectives to detail this important oppositional dynamic. During an interview, a participant (Racoon) contributed:

> Is transformation always necessary? No, I mean, I want people to be open to growth and open to like even a student who is taking a class that's relatively easy for them? Do I think that they could still dig in and learn and get more? Should they still challenge themselves? Yeah. But that's me. That's my choice. That's not their necessarily their choice. So ultimately that choice is the students

This statement indicates opportunities exist not to intervene, though certain conditions and means to explore the situation are still utilized when making this decision. Questionnaire participant (Koala) also stated "transformative perspectives typically are needed when the student is facing barriers with completion of assignment, is struggling with time management, or extenuating circumstances outside of their courses" providing the context in which barriers to transformation might more frequently occur.

Resistances to Learning and Transformation. Change, whether academic, personal, or professional, was indicated by many participants (INT=18; QST=30) as requiring learners to step outside of their comfort zones. Sometimes change triggered 'resistance', identified as when facilitating a transformation in a learners' perspectives was delayed or met with opposition. Significant dynamics reflected in the data include recognition for active vs passive resistances, internal and external resistances, as well as the need for patience and persistence when navigating resistances. Addressing the needs underlying different resistances was identified as critical to helping learners grow, adapt, and succeed in an ever-changing academic and professional environment. Participant contributions (INT=18; QST=29) highlighted an understanding that learner resistances help advisors identify important information about when transformations in learning perspectives must be initiated.

Examples of learner resistances included both ‘active’ (i.e., vocalizing doubts or refusing to try new methods) and ‘passive’ (i.e., disengaging, withdrawing, or avoiding the issue altogether). Interview participant (Quokka) indicates an example of active resistance “where your suggestions are met with resistance, and then they're continuing to have that same, you know, complaint or thought, or or something like that”. ‘Active’ resistances to transformation, such as this, were indicated as manifesting in actions like procrastination, reluctance to engage, or even explicit opposition to new ideas. Questionnaire participant (Skunk) further provides an example of passive transformation, stating:

> A student resistant to my attempts to transform their perspective, when I believed there was still a clear path forward to them toward a different outcome, usually looked like a student who was stubborn or static in their beliefs about their current place.

This data informs of a strategy to identify when a learner is feeling resistant to potential transformations, even when they do not expressly state an objection or barrier. Both active (i.e., learners outward, directed actions) and passive (i.e., non-cooperation or subtle defiance) resistances were described by interview (*n=15*) and questionnaire (*n=23*) participants as central to deciding when to transform a learners perspective.

Resistance was noted by eight participants (interviews=5; questionnaires=3) as not always just internal (i.e., self-doubt or past trauma), rather it can also come from external factors (i.e., family expectations, societal pressures, or conflicting cultural norms). As an example of internal resistance, questionnaire participant (Sheep) contributed “if a student seems to believe that their advisor is responsible for helping with

homework or mediating in a problem with their professor, or they expect special individualized tutoring with their professor". An interview participant (Wolf), further informed, "things outside of the education realm, but also within it, definitely impact their decisions and the way that they look at graduate education… Even externally, like their family and their work environment." Providing explanation for this experience, an interview participant (Giraffe) explained:

> A lot of our graduate students are typically going to be, you know, working full time. They may be parents. They might have, you know other obligations, family obligations. And that's like on, I would say, on the majority side. So for me, when I'm you know, advising them, I am trying to figure out like what potential like barriers of those are gonna impact your ability to do your school.

This data indicates that external pressures in a learners' life can significantly affect their ability to focus on and succeed in their academic programs. Participants describe ways to help learners navigate their individual pathways to success, by understanding and addressing the broader challenges they face, such as personal, professional, and academic responsibilities.

Five participants (INT=4; QST=1) further reported navigating resistance required them to be patient and persistent, recognizing that it may take time for individual learners to process and accept new perspectives. By understanding the underlying reasons for resistance, this suggests advisors can tailor their approaches to gently guide students toward growth, while also respecting the hurdles they may face along the way. For example, as an interview participant (Reindeer) informed:

> I think that it's a bigger deal that they did all the things they were supposed to do. Then that they didn't get the grade that they wanted, or they didn't get the outcome that they wanted. So I think it's easier to look at, or it's difficult to look at performance to see if a student is resisting. But more so like the action, so if I said, Hey, you should do XY and Z, and they didn't do any of those things. That's a better indicator that they're resisting.

In this example, persistence is demonstrated in the act of breaking down complex tasks to identify the point which a learner may be most resistant. A questionnaire participant (Armadillo) stated "the only times that I can recall a student being particularly resistant is when they are escalated. For example, if they call in heated about something, they generally need to vent and be heard." This indicates that when learners resist new perspectives, advisors respond by recognizing and addressing these barriers strategically. Data highlighted that while advisors can offer valuable tools for managing resistances, the learners' presence of mind and ability to overcome their resistances was essential.

How: Dynamics of Transformation. Five themes were identified as addressing the second component of the first research question, 'how' advisors decide to transform a learners perspective. The included themes are 'co-created learning and advising roles', 'transformative advising approaches', 'motivation-driven learning mindsets', 'empowered self-transformation', and 'emotionally intelligent cognitive transformation'. Each of these themes represents a significant part of the decision-making process occurring when attempting to facilitate a transformation in learning perspectives. However, each of these decisions is objectively based on the situations occurring and the student being helped. See **Table 4** below, listing these themes along with a description

and example for each. Participant contributions to these themes explain how advisors can create a safe and motivating environment that encourages learners to embrace the potential of transformations.

Table 4

RQ1: "How" Themes: Descriptions & Examples

Theme	Description	Example
Co-Created Learning and Advising Roles	Readiness of learners to embrace new ideas and experiences	Advisor will call to check-in and learner will be receptive to feedback
Transformative Advisement Approaches	Utilizing real-world experiences to challenge/reshape beliefs	Overcoming challenges or demonstrations of capabilities
Motivation-Driven Learning Milestones	Influencing a learners' motivations and connecting to milestones	Reminding a challenging course is necessary for program of study
Empowered Self-Transformation	Empowering learners to explore new views and take charge of learning	Discussing validity of engaging in peer discussion work, or embracing feedback
Emotionally Intelligent Cognitive Transformation	Acknowledging the role of emotions in learning and perspective formation	Reminding learners to celebrate small successes, or acknowledging frustrations

Co-Created Learning and Advising Roles. Many participants (INT=15; QST=23) described an interactive advisement relationship they cultivated with learners, where each have defined roles and responsibilities. These co-created learning and advising roles offered a clear delineation of responsibilities to help establish trust and mutual respect. While individually both roles (i.e., coach, mentee) and responsibilities (i.e., listening, providing suggestions) were significant, participants also described instances where these were shared between advisor and learner. These roles are essential for fostering an environment beneficial to reflection on current and past academic successes and failures, which leads to future growth. This data supports a process where both the learner and advisor are responsible for the co-creation of learning and advising roles.

Facilitating transformations in learner perspectives was described as creating an interactive relationship where both the advisor and the learner have established roles. An interview participant (Wolf) explains their role in facilitating these learning activities as "I can give you all of the information… give you all of the tools, and the resources, but really, when it comes down to it, the performance in the classroom is fully on the student". This was supported by statements made by questionnaire participant (Mouse), who informed "as an advisor my role is to make sure that their academic expectations are realistic, and they are making the appropriate progress". Learners' roles were also described by participants. As an interview participant (Hippo) indicated "it is important for [the learner] to be honest, because I can't do the best job that I can to help them if they're not being honest". In support of this premise, a questionnaire participant (Elephant) also stated "it is the student's role to apply the information/ideas discussed. If the ideas discussed aren't working for the student… [it is] to be honest with the advisor so they can come back to the drawing board". The advisor role was described by participants as including different tasks related to guiding and coaching the learner to take actions that promote success.

Participant data (INT=8; QST=13) indicated when learners understand their responsibilities in the advising relationship, they are more likely to take an active role in their learning process. The division in responsibilities is exemplified by an interview participant (Rabbit), indicating "the student has responsibility. They're here to learn and work to facilitate, help facilitate their learning and access to resources. But we shouldn't be doing the work. You know, they have to put in the time." These trust-based partnerships allow for more meaningful dialogue which benefits both but the learner, in

particular. In an additional example, a questionnaire participant (Antelope) contributed "the student is responsible for doing the work, I am responsible to make sure they are making adequate progress toward their goal". This indicates while the advisor offers their personal expertise, they must also respect the learner's individuality and goals.

The clarity of roles within this process ensures that both the learner and the advisor are aligned in their commitment to growth, making it possible to achieve lasting changes in perspective that extend beyond the academic environment. To better exemplify the shared roles and responsibilities involved in these relationships, an interview participant (Bear) offers:

> Especially in the coaching relationship with the student, there is a lot of overlap so the expectation for coaches… is that they are a leader in that relationship… that doesn't always mean giving the correct answers… or telling someone what to do, but it is more about leading students down the path that they've identified as being right for them.

The interactive nature of this advising relationship helps learners develop the necessary problem-solving and decision-making skills. A questionnaire participant (Koala) further explained advisors are "responsible for helping students navigate their feelings, help with strategy to meet their goals", while the student "is responsible for carrying out the work to complete their goals, such as, completing their assignments, managing their time, and communicating their needs". In this co-created role structure both parties are actively engaged in the advising process, with the advisor providing guidance, resources, and insights, while the learner takes ownership of their educational journey.

Transformative Advisement Approaches. The development of individualized advisement approaches was indicated by each interview (*n=18*) and most questionnaire (*n=28*) participants as impactful for deciding 'how' to transform learners' perspectives. In a transformative approach to advisement participants described utilizing real-world learner experiences to challenge and reshape belief systems. Significant dynamics of this theme include the understanding that transformation has boundaries and recognition that graduate learners' prior experiences are valuable. Understanding the unique dynamics attributed to this learner population is an effect of developing and successfully implementing strategic advisement approaches. This is impactful because the combination of experience and practice helps learners move beyond a state of passive learning.

A significant responsibility as part of a transformative approach to advising is recognizing the learner is responsible for acting. The advisor was then responsible for understanding the limits of a learners boundaries, and whether transformation was an appropriate path. An interview participant (Kangaroo) explained "sometimes a student doesn't want to ask questions and not asking questions might not necessarily mean that your information, or what you're giving them, isn't transformative." As this data indicates, a transformative advisement experience does not always mean a changed perspective; providing learners with potential options, does not mean they will be ready to take identified steps. A meaningful contribution to this argument was made by questionnaire participant (Hyena), stating "most students haven't had time to think about what they want and why. They haven't had anyone ask them in detail why they are doing something or how they are going to get there." In action, this means understanding the

learner's unique background, strengths, and challenges and then offering guidance. By testing out real-world learner belief systems, participants informed of unique strategies they use to help provide alternative options to learners, as needed.

Transforming learner perspectives involves creating opportunities for learners to apply their knowledge in real-world settings, which allows them to test and revise their existing beliefs as needed. An interview participant (Reindeer) informed:

> I think a lot of times we, like advisors in general, are afraid to ask really tough questions or to like kind of call student out when they need to be called out in a nice way… I don't want to hurt anyone's feelings, but sometimes asking tough questions is how we have to, to approach that.

With a clearer understanding of the learners experiences, a transformative approach to advising can be utilized. As supported by a questionnaire participant (Deer), “I approach advising in a developmental way for graduate learners which involves facilitating asking the student for clarifying their personal and professional goals and strategizing to reach that goal”. This data supports the understanding that deciding how to transform a learners’ perspectives requires also focusing on how personalized advisement can be used to challenge and reshape that learners' belief system.

Fifteen participants (INT=8; QST=7) described experience and practice as intentional activities a learner engages in to develop skills and competencies in particular areas. This process can look different for each learner according to the data collected. For example, one interview participant (Tiger) contributed:

> The types of conversations that we want to be having with students as far as really like digging deep, getting a students why. All of those things, and so so much of

> that is is best we can learning about a student's experience, and what experiences they are bringing in with them.

This indicates a personalized advisement approach focused on the application of knowledge, can challenge, and reshape existing learner' beliefs. As further supported by a questionnaire participant (Puffer Fish) “a graduate student conversation may center around the student's experience using that tool, what went well, how they plan to use it moving forward.” This supports the understanding that graduate-level learners bring a unique set of experiences and expectations to the learning environment, which impact how transformations are facilitated.

Motivation-Driven Learning Mindsets. To further understand ‘how’ advisors facilitate transformations in learner perspectives, participants (INT=12; QST=24) described the importance of understanding learner motivation. Dynamics important to a motivation-driven learning mindset include recognition of why motivation is important, investigating learner dispositions toward lasting change, and emphasizing the value in exploring alternative mindsets. This theme also indicates motivation towards academic activity, or the learner’s motivations to take charge of their learning, can further impact how an advisor approaches transformation. It helps inform how an advisor can influence a learners’ motivation, as a means for promoting transformations in their long-term perspectives.

Before an advisor can help learners leverage their motivations for a specific academic goal or outcome, understanding the true nature of learners motivations was described as necessary. The value of this exercise was explained by an interview participant (Squirrel) as:

> Sometimes through talking through their motivations, their career goals, the skills that they need what they really want to do, you can kind of uncover this is really not their passion project. This is not what you hear the excitement in their voice about, it really doesn't match up with what they're wanting to do and where they're going.

Recognition for this approach to understand what the learner is going to be passionate about indicates there is value in accurate discovery of learner motivations. One questionnaire participant (Monkey) further contributed "once the motivation for the end goal is determined it is easier to advise the student and support them through their journey". This indicates, each learner is driven by different factors, such as personal goals, interests, or external circumstances, and advisors must tailor their approach to align with these unique drivers.

Seven participant (INT=4; QST=3) contributions described the significant role a learners' dispositions play in their engagement in activities leading to lasting change. This data indicates despite an advisors effort to transform learner perspectives, lasting change was only possible when a learners mindset is open to transformation. As explained by an interview participant (Hippo):

> I wish I could just snap my fingers. And then, yeah, this person would be like, now they have a growth mindset or whatever it may be. But I think I think that's the biggest thing is that I can't just magic it to happen for them… they have to be very intentional about it, like, really take actions to make the things happen.

Being motivation-driven was indicated as requiring a mindset oriented towards what is possible, rather than the barriers that may delay or prevent a goal from happening. This is

further supported by questionnaire participant (Hyena) who stated, “students can get lost in their current work life and second guess their motivations for being in their program.” Learners with strong drive to accomplish their goals were indicated as more likely to independently explore and question new ideas. This indicates a learners’ mindsets are important strategies advisors' use to personalize learning experiences, leveraging a learner's motivation, behaviors, and belief system.

Another important dynamic described by several participants (INT=9; QST=11) as part of understanding learner motivation, was the process of advisors’ emphasizing the value to learners, if exploring alternative mindsets. By personalizing learning to fit a learner’s unique motivations and helping them cultivate a growth mindset, data contributed an advisor can inspire learners to set and achieve meaningful goals. In an example provided by interview participant (Reindeer):

> I think a lot of times, especially new graduate students have a mindset that they have to kind of work through. So it's a little bit of transforming just their thought process. It's not necessarily their actions, because they're doing what they're supposed to be doing.

This approach was described as promoting long-term engagement and encouraging diverse learners to view challenges as steppingstones to success. Growth mindset was further explained by questionnaire participant (Zebra):

> It’s our job as advisors to ask probing questions, evaluate the comfort level and fit of the program. To offer solutions, alternatives and lead the student to evaluate for themselves if the program is sustainable, meets their individuals’ strengths and skills, and is in their best interest.

Via alternative suggestions provided by the advisor, this example informs of ways alternative pathways to success can be leveraged to help a learner reinforce their motivations. This indicates a learners motivation-driven mindset plays a key role in how they approach challenges and achieve growth.

Empowered Self-Transformation. Common themes of empowerment and autonomy were noted by participants as significant to this research. The overall theme of fostering an environment where learners feel empowered to explore new viewpoints and take charge of their learning was evident in many participant (INT=13; QST=27) descriptions. This theme focused on the processes advisors use to empower learners and encourage their autonomous decision-making, to explore and understand new viewpoints through their academic pursuits. Significant dynamics the data explored include the roles of empowerment and autonomy in facilitating effective transformations in learner perspectives.

Empowerment was noted as important to the transformation of learning perspectives because it can lead to increased engagement, satisfaction, and collaboration. The way one interview participant (Rabbit) explains this process to help and see students "grow and become more confident as they move through their education, I could see transformations." Additionally, this theme emphasizes the advisors goal of helping facilitate the learners' ability to take charge of their own transformations moving forward. Another interview participant (Fox) explains:

> I would say that my big mantra I like to follow is empower, don't enable. We are not there to take all their classes out for them, and they I will oftentimes remind

> them that they're the ones going to school, earning their grade, learning the material, making the decisions best suited for them for their life.

This is further supported by questionnaire participant (Koala) who states, “to transform a learners perspective is to ultimately guide a [student] to think about a situation differently… [though] some students have barriers that surpass coaching that hinder them from progress.” The theme of empowered self-transformation was described as significant for promoting learners’ independence and self-efficacy by encouraging them to take ownership of their educational decisions.

Participants (INT=6; QST=6) also indicated empowerment of learner self-transformation required engaging the learners’ autonomous decision-making. The act of promoting learner decision making was described as enabling the learner to take desirable actions. As an interview participant (Bear) explained “as long as you're letting the students steer the ship, you're there as the passenger, and making sure that you know you're giving them the directions, like old school map quest.” This was supported by questionnaire participant (Walrus) who contributed “in general, I leave decisions to students but have conversations to make sure we are on the same page”. This perspective indicates when learners feel empowered to make their own, autonomous decisions, they are better equipped to take responsibility for their learning long-term. In another example, questionnaire participant (Lamb) explained: “[I] realized that they had their own ways of doing what they needed to complete the coursework and just needed a little vote of confidence to keep moving forward”. This indicates by trusting learners to make decisions and providing them with the tools and resources to succeed, advisors help build their sense of competence and control over their education.

Emotionally Intelligent Cognitive Transformation. The significant role of emotions was noted as a common theme by participants (INT=5; QST=13), to address how decisions are made related to transforming a learners perspective. This theme acknowledges the role of emotions and feelings in learning, which can affect how information is processed, including the transformation of learning perspectives. Within this theme, important topics discussed include emotional intelligence, the value for both positive and negative emotions, and building emotional resilience. These dynamics were described as contributing to an advisors' development of emotionally intelligent approaches to assessing and promoting learner cognitive transformation.

An advisors' capacity to observe and contribute to the transformation of learning perspectives is evident in their emotional intelligence. One interview participant (Bear) explains "we can't look up emotional intelligence. That's something that coaches have to train, and coaches have to hone throughout their careers, not just as they get started… developing those skill sets.". This theme further highlights the significant role that emotions and feelings play in the learning process. Learners' emotional states are indicated to deeply influence engagement with content, causing a shift in perspectives over time. As a questionnaire participant (Koala), informs: "I am responsible for helping students navigate their feelings… I also deal with the emotional aspect of it all. My responsibility to a student is to promote a growth mindset in helping them believe they can achieve their goals." This indicates advisors need to recognize that emotions are significantly impactful on how learners absorb and apply new knowledge.

Understanding the impact emotions have on learner decision-making, another notable dynamic of emotionally intelligent cognitive transformation is the recognition for

value in both positive and negative emotional responses. As an interview participant (Giraffe) indicated “a lot of those other like emotional things, I think, can also show that they've changed, and that it's been in a positive manner”. This data indicates advisors can help learners navigate these emotions by providing encouragement, reassurance, and a sense of safety. As a questionnaire participant (Cow) further explains, “the most challenging part of transforming a learner's perspective is when they have already made up their mind, acting with strong emotion and don't listen”. This data indicates both positive and negative emotions are utilized to assess the potential effectiveness of an attempted perspective transformation.

Participants (INT=10; QST=14) also indicated advisors can help learners build emotional resilience by helping them reframe setbacks as learning opportunities. While seven participants acknowledged emotions where inevitable, further explanations offered strategies to cope with stress and anxiety. As an interview participant (Quokka) explains:

> I think with students are going through hard times… like it is obvious they're emotional, and it is emotional, I feel for them. But I try to separate that because I think if I would for me, and who I am… I would let myself get emotional, then I'm putting myself in their mindset. And I think for me, it's like, ‘Okay, let's talk about this in a calm, cool, clear, collected manner’.

In this description, emotional support encourages learners to persist through their difficulties, developing new experiential knowledge to be used in the future. One questionnaire participant (Whale) shared the experience: “I asked a great deal of questions to fully hear their perspective and to provide them space to share all their feelings”. This indicates, by addressing emotional and psychological factors, advisors can

create a learning environment where learners feel safe, supported, and capable of facing challenges.

RQ2: What is Involved in Facilitating Transformations in Learners' Perspectives

Participant descriptions of 'what is involved in facilitating transformations in learners' perspectives (RQ2) and the 15 themes identified to address this research question, are reviewed in this section. To better understand the steps involved in this process, the themes were grouped into six conversational phases as described by participants; these phases included 'creating enduring advisement relationships, 'reflection and assessment', 'planning and strategy development', 'implementation of interventions', 'continuous support and follow-up', and 'transformation and retention'. The component themes within each grouping uniquely address this research question; acknowledging the unique dynamics of each grouping is also significant to the data collected. Each of the identified themes ($n=15$) contributes significantly to the understanding of what is involved in facilitating transformations in learning perspectives.

Creating Enduring Advisement Relationships. An enduring advisement relationship was described creating long-term advisement relationships that have a meaningful impact on the process to transform a learner's perspectives. The first grouping of themes related to creating enduring advisement relationships; these themes include 'every conversation is a different conversation', 'reflective inquiry', and 'interpretive advisement frameworks'. These themes describe what is necessary to form enduring relationships with learners. When combined, these elements foster an environment where transformation is possible because learners are guided by supportive

advisement partners, to reconsider their academic and personal perspectives. See Table 5 identifying each phase in order, with a description of each theme.

Table 5

A. Creating Enduring Advisement Relationships Themes: Descriptions & Examples

Theme	Description	Examples
Every Conversation is a Different Conversation	Applying personalized, adaptable advising approaches to individual learner interactions	Time management planning, or schedule structure
Reflective Inquiry	Using questions to encourage self-reflection and deeper thinking	Open- vs. closed-ended questions
Interpretive Advisement Frameworks	Understanding learners' perspectives and challenges	Active listening, rephrasing, or questioning responses

Every Conversation is a Different Conversation. The theme 'every conversation is a different conversation' highlights the uniqueness of each advisement interaction. Participant statements recognized that each learner's needs and perspectives were unique, requiring tailored, adaptable guidance. All interview participants (*n=18*) and many of the questionnaire (*n=26*) participants described instances where unique approaches were needed to cater to diverse learner needs. One example from an interview participant (Quokka) indicated "I think it probably depends on what their questions or concerns are when they're reaching out". And questionnaire participant (Cheetah) further explains "there is a script that is primarily used for advisement, but I have some say in how I gather information for conversations." Both approaches were described by participants with variable degrees of success, indicating every conversation was best when treated as involving a unique situation, context, and student need. Other descriptions provided situational reasons conversations might differ, such as one interview participant (Lion) who informed "depending on the time of year, depending on what's being offered" to explain advisement approaches. Participant descriptions emphasizing the need for

adaptability in advising were organized within the theme ‘every conversation is a different conversation.

This theme also reflects the idea that advising is an inherently personalized, responsive, and evolving process that must be customized to fit individual learners. All 18 interview transcripts and 25 of the questionnaire transcripts informed understanding learner differences was significant to advisement interactions. As a questionnaire participant (Platypus) further explains:

> I have had to develop my conversation skills and learn to ask the right type of questions about a situation. I also have to be flexible… I am constantly evolving my advising skills, and learning from my students and my peers about how to be a better advisor.

This and other comments from participants indicate institutionally encouraged approaches emphasized personalized approaches to advisement help meet evolving learner needs. Benefits of this approach were further explained, such as the statement “sometimes the transformation I think that the student needs when we start a conversation is way different than the actual needs they are trying to express or what they really need” submitted in a questionnaire (Possum). Participant descriptions of their personalized advisement approaches to engage with individual learners were a significant theme.

Reflective Inquiry. The use of questioning to investigate and discover information, as well as encourage learner self-reflection and deeper thinking, was identified as the theme ‘reflective inquiry’. Several participants (INT=16; QST=22) contributions to this theme include strategies such as the use of probing questions to create space for learners to think about how they want to engage. As in an interview

participant (Reindeer) indicated “don't be afraid to ask those questions, or like the way that they worded it to me was, you're entitled to ask those questions”. This data indicates advisors are expected to help learners move beyond their existing frames of reference and consider alternative viewpoints, despite the potential for discomfort this may cause. As a questionnaire participant (Zebra) explains:

> Realistically as long as we are following the Inside Track advising model, and hitting on the important pieces laid out in that conversation schedule… The model implemented lends itself to this, allowing the coach to guide to different focus areas, address concerns and set goals using the Grow model and focusing on SMART goals.

In addition to fostering self-reflection in the learner, this data indicates the advisor is practicing reflectively inquiry to hone their own professional practices.

Participants also informed ‘reflective inquiry’ involves using asking questions as a tool to facilitate transformations in learner perspectives. As an interview participant (Jaguar) explains “I'm able to ask the hard questions. I'm able to dig deep. You know, as long as I'm being a professional, you know I can pretty much be open.” This indicates through thoughtful, open-ended questions, participants indicated advisors can help learners explore their values, motivations, and assumptions. This experience is described by one questionnaire participant (Baboon) as “I'm responsible for the discovery of the needs of the student. I must listen to what is not being said and ask key open ended questions”. The described process initially provides immediate answers but also as guides learners to uncover insights and grow into independent thinkers. This process was described as a significant part of establishing an enduring advisement relationship.

Interpretive Advisement Frameworks. Another impactful description of creating enduring advisement relationships was the development of 'interpretive advisement frameworks'. While 13 interviewees' informed of personalized frameworks used, contributions to this theme were supported an additional 19 questionnaires. These individualized systems were noted as developing out of each advisors' experiences, training, and knowledge. As explained by one interview participant (Bear):

> We really are looking at 8 different focus areas of things that put students at risk for being unsuccessful in in higher ed… health and support, effectiveness, academics, school community, or belonging in the school community their commitment to completion, their career goals, their managing commitments, and their finances.

This indicates the processes involved in advisors interacting with learners, leads to the development of interpretive frameworks that advisor uses, to manage similar learner situations in the future. In further explanation a questionnaire participant (Hyena) informed:

> Since adult learners can be a bit more cynical, especially graduate students, mostly it is challenge to get them to understand I care, I listen and I already know they can achieve their goals and it only a matter of putting a solid plan into practice.

By interpreting and responding thoughtfully to the needs and desires of learners, this data indicates advisors help demonstrate behaviors that can lead to enduring academic success.

Listening was also indicated to be a fundamental component of developing interpretive frameworks for advisement. Nearly all participants (INT=17; QST=28) described listening to learners with intent creates a space for mutual understanding and trust. Where one questionnaire participant (Bat) indicated, “active listening is the most important skill… I need to hear what they are not saying out loud”, during an interview another participant (Mule) contributed an approach “to point the student to the right directions and resources that could help mitigate some of those things that they're dealing with”. The skilled practice of actively listening to a learner was indicated by data in this theme, as a tool participants might use to understand transformational learning needs. As an advisor continually engages with a learner, their interpretive frameworks are further defined, and enduring advisement relationships are formed.

Reflection and Assessment. The themes of ‘reflective practice for continuous improvement’ and ‘barriers to learner progression’ represent alternative sides of participants’ aim to reflect on and assess learner transformation needs; see Table 6. Grouped by this contrasting relationship, ‘reflection and assessment’ are important to be done in succession. A questionnaire participant (Armadillo) explains why this is significant, indicating “I’m responsible for delving into a discovery process which leads a student to self-reflect and potentially come to a decision.” Reflection provides the insight needed to uncover these obstacles, and eventually to overcoming them. As supported by an interview participant (Bear) “when a student sees that a coach is really gonna follow through on the things they said they were gonna follow through on, when there's a bigger problem down the road, there's less hesitation to reach out.” This data indicates when learners reflect on their past experiences, they may more accurately assess both internal

barriers (i.e., anxieties and biases) and external challenges (i.e., lack of resources or competing obligations) that may impact their progress.

Table 6

B. Reflection & Assessment Themes: Descriptions & Examples

Theme	Description	Examples
Reflective Practice for Continuous Improvement	Encouraging learners to reflect on their experiences	Sharing personal examples, or reviewing decision-making
Barriers to Learner Progression	Understanding what hinders learners from achieving goals	Identifying past learning challenges, or current barriers

Reflective Practice for Continuous Improvement. The theme 'reflective practice for continuous improvement' emphasizes the process participants (INT=18; QST=28) described as encouraging learners to reflect on their experiences, promoting efforts for continuous evaluation and improvement. As one participant (Hyena) contributes "the student is responsible for reflecting on what they want to gain out of their program... Grades matter but they aren't reflections of your abilities". They further explain their approach "to remind them, grades are only a reflection of a single moment in time, what you understood at that moment and how you could convey that understanding" (Hyena). As this approach indicates, revisiting a learner's past experiences is a fundamental step in the process to transform learning perspectives, though not the most impactful indicator of future outcomes. Another participant (Squirrel) supports this, stating "that's also part of that continual transformation, understanding we can't please everyone, but also being respectful of different people's learning preferences and what works for them". With this data, it is understood an advisor encourages a learner to revisit their experiences, which prompts them to examine their own assumptions and beliefs.

An additional dynamic important to this theme is the process of continually seeking out ways to improve practices. As one questionnaire participant (Deer) contributes "after discovery, I would provide recommendations that could improve time management to successfully balance both work and academic schedules." Assessments like this depict the act of critically examining a learners' beliefs, assumptions, and practices, especially when seeking out new information or insights. Exemplifying approaches used for this process further, another questionnaire participant (Lamb) indicated:

> Eventually, after enough repetition of helping the student realize that the issue did not repeat itself and that they had been able to continue on in the course, the student stopped referencing it and did not bring it up on our calls. Redirection and repetition was key with this student to help them get back on the right track.

This indicates advisors' support learners with ongoing evaluation by encouraging them to stay open to new insights and feedback. As learners adopt this iterative process, the data indicates they are better equipped to navigate future challenges, adapt to new situations, and maintain an ongoing commitment to personal and academic development.

Barriers to Learner Progression. The theme 'barriers to learner progression' acknowledges participant descriptions related to their understanding of what internal and external challenges hinder learners. Related participant contributions (INT=14; QST=22) indicate when learners reflect on their past experiences, they are more likely to recognize internal barriers like their pre-existing anxieties and biases. As one interview participant (Quokka) explained:

> You can try to have that conversation and see if you can start to break through a little bit. But a lot of times if they are in that mindset it really, you know, you'll just have students saying, Well no, I can't… It's not gonna work or No, I you know, like I can't do that.

This data contributes the understanding that reflection and assessment is a continual process, as barriers can change over time. As a questionnaire participant explains (Walrus), "due to the time constraints a grad student normally has (i.e., family life, social life, work life), it is important to ensure that a student can do the work and still have work life balance". Reflecting on internal barriers was indicated as a proactive step to helping learners overcome challenges.

Collected data also indicates, when learners reflect on their past experiences, they are more likely to recognize external factors impacting their academic progress. As one questionnaire participant (Rhino) explains:

> One of the most recurring general scenarios where I might decide a learner may need to transform their perspectives to succeed academically center around time management. A majority of the students… are classified as Non-Traditional students. These students are normally older adults with jobs/careers and other responsibilities they have to take care of.

External challenges like this were described by participants (INT=8; QST=13) as having a significant effect on a learner's ability to stay on track with their educational goals. In another example, an interview participant (Giraffe) informed:

> A lot of our graduate students are typically going to be, you know, working full time. They may be parents. They might have, you know other obligations, family

> obligations. And that's like on, I would say, on the majority side. So for me, when I'm you know, advising them, I am trying to figure out like what potential like barriers of those are gonna impact your ability to do your school.

This data indicates advisors help learners identify external factors by providing tools and strategies for managing time, navigating institutional systems, or accessing support services. Both internal and external reflection is described as contributing significantly to an advisors ability to accurately assess learner situations.

Planning and Strategy Development. This alignment of learners goals with career aspirations was indicated by participants to be necessary for achieving both education and career development goals; three themes were grouped together as significant to ‘planning and strategy development’. Participants emphasized how ‘personalized and adaptive goal alignment’ encourages learners to set realistic and flexible academic goals based on their individual strengths, challenges, and broader life vision. In a related but distinctive theme, participants also emphasized the importance of ‘exploring opportunities for academic progress’. As a result of this process, learner goal-setting serves as a foundation for ‘bridging education and career pathways’, which build upon these goals by helping learners understand how their academic pursuits can translate into specific career paths. Each of these three themes (see Table 7) relate in their description of how advisors utilize a personalized and adaptive process of aligning learner activities with long-term life goals. Participants emphasized the importance of their role in guiding learners to make well planned, strategic plans for achieving their long-term career goals.

Table 7

C. Planning & Strategy Development Themes: Descriptions & Examples

Theme	Description	Examples
Personalized & Adaptive Goal Alignment	Collaboratively setting goals that align with vision of success	Choosing majors/minors, or planning timeline to completion
Exploring Opportunities for Academic Progress	Finding different potential pathways to achieve goals	Making plans for future potential barriers
Bridging Education & Career Pathways	Linking personal development to career aspirations	Taking courses to prepare for career change

Personalized and Adaptive Goal Alignment. A significant theme some participants (INT=6; QST=13) discussed includes 'personalized and adaptive goal alignment'. This theme involves dynamics of the advisor and learner collaboratively setting realistic, flexible goals founded on well-informed practices and learner's broader aspirations. As one interview participant (Tiger) explains "really learning about students, why and what brought them here. And what potentially is going to, you know, impact of their journey along the way, as they're working to achieve their educational goals." The provided data indicates an emphasis on the advisors role in fostering learner ownership and active engagement with course content, informing their future decisions. As confirmed by a questionnaire participant (Turtle) "the student is responsible for investing in their academic career by using available resources and committing themselves to completing coursework to the best of their ability". This theme was evident from participant data, as comments related to collaboratively setting incremental, attainable goals were a common point of discussion related to transformation of learning perspectives.

While the personalized approach was clearly emphasized, an adaptive system of following learners progress through goal was also noted frequently by participants. One way an interviewee described this experience was (Jaguar):

> I developed it in conversations with the student, and more often I speak with them. I still try to gauge, because, as we know, it's humans. Our interests, goals. Things change and vary all the time. So in every conversation I still try to make sure that they're what they are looking to accomplish is still what they're looking to accomplish. So that I can still provide whatever resources they need at whenever time we're speaking.

With this approach, focusing on realistic and flexible goals ensures that learners set achievable targets while remaining adaptable to changing circumstances. When meeting resistances with this approach, one questionnaire participant (Antelope) further explained "I show them the benefits of doing so and why it is important to achieving their goals." The rationale for this approach was further explained by another interview participant (Tiger), who informed "we are here to support our students to help them reach their educational goals." This data indicates the planning and strategic development of learning goals, requires aligning personalized and adaptive approaches.

Exploring Opportunities for Academic Progress. The theme 'exploring opportunities for academic progress' was significant, as participants (INT= 15; QST=24) frequently described approaches and experiences identifying new learner opportunities. Included within this theme were statements of potential outcomes discussed and plans made to overcome strategic challenges the learners knew they might face. As an interview participant (Horse) explains:

> Well, I want to graduate in this, you know, and by this semester and I look at it, it's like my gosh, it's just not feasible… So I would tell them, well, how important is it to really graduate in this one, you know, by this term.

This data emphasizes a personalized approach to exploring the opportunities each learner has for potential barriers to academic progress is most effective. One explanation for this was provided by a questionnaire participant (Platypus), who indicated sometimes "student[s] needed a reminder and a subtle push to return to their class, as they were so close to completing their program and achieving their goals". By identifying what opportunities individual learners have for managing academic progress and attaining long-term success, this data indicates advisors play a critical role in facilitating the cognitive transformations taking place.

After identification of a learners goals, 12 participants (INT=5; QST=7) also emphasized 'exploring opportunities for academic progress' was important for learner perspective transformation. Interview participant (Tiger) informed "Not only being in class, but that proactive action of being enrolled in future terms as well… that happy path [through] course progression". As participants described recommended registrations and course sequencing plans, it was clear the learner was a major deciding factor. In further support of this understanding, a questionnaire participant (Deer) indicated:

> A GRAD student wanted to transfer out to another school because they felt they could learn better in person. The students progress in the program was half way complete. After explaining to the student of risks of starting over their credits and credits may not be transferrable depending on the school they would also be losing the time and money… student felt I was looking out in their best interest.

Exploring opportunities for academic progress like this was indicated to be enough to help satisfy short-term learning needs, on the pathway to completing long-term academic progress goals.

Bridging Education and Career Pathways. The final theme related to the grouping of 'planning and strategy development' was the most discussed by participants (INT=18; QST=22), 'bridging education and career pathways'. Contributions included in this theme involved the alignment of academic activities with specific learner career goals. While this began with the development of career aspirations throughout an academic program, participants also noted the importance of linking related learning activities with the learners intended career pathways. This process was explained by questionnaire participants in-depth, as, "since graduate students have less flexibility with which classes they take, I usually focus my conversations with them on their current/future classes and on applying this knowledge to their career/other goals" (Eel). This was supported by another participant (Platypus), who stated "our graduate students are often adults who are working in the field or looking for a career change and are returning to school after a lot of time away". These statements highlight an important aspect of participant descriptions related to helping learners see the practical applications of their education and make informed choices regarding career trajectories.

Seventeen participants (INT=8; QST=9) also mentioned the importance of discussing career planning goals to confirm learners were prepared with realistic expectations. Specifically, career planning resources were discussed in relation to how the advisor might guide learners through a process of evaluating their own strengths and

interests throughout the duration of a degree plan. For example, an interview participant (Squirrel) relayed the story of:

> I think what graduate students need a little bit more of is some career help. As far as different credentials that they could add on to their degree. So we're talking about certificates and other micro credentials that can fill out their resumes. And other ways to make that more attractive as they're looking to advance.

While they recalled not being able to transform the learners perspective regarding the situation, they did provide the learner with all necessary information to make their own informed decision. To address these inquiries, many participants (INT=7; QST= 9) also noted Career Services resources, such as when a questionnaire participant (Mouse) informed:

> I once told a graduate learner that he should consider his options in the workforce after he consider pursuing a second graduate degree. He was not financially stable, had a family to support and was facing foreclosure. After getting him in touch with the Career Services office who explained the job market he completely changed his perspective.

This data indicates a collaborative relationship exists between advisors and other institutional staff, with the united goal of servicing the long-term career goals of different learners.

After clearly understanding a learners intended career trajectories, participants emphasized the importance of providing guidance on how their education translates into real-world opportunities. As explained by an interview participant (Bear):

> More of our graduate students are already working full time in the career of their choice. And they're not often not doing a graduate program because they want to make a big change. It's because they want to grow in the role that they're in and so a student who has a really positive work environment, and career experience is really able to like connect what they're doing in the classroom to their day to day at home. And in their work lives.

By connecting these learner career goals to classroom activities, the participant emphasizes how learning can have value beyond this setting. Connections like this also encourage learners to view their academic efforts as part of a larger career trajectory, fostering a deeper sense of purpose in their education. Improving awareness is another impact program outcomes have on career readiness, as a questionnaire participant (Hedgehog) explained "I have career service knowledge and every hiring manager [I've spoken to] said 'We do not care about GPA'." This contribution informs career planning helps learners see the practical applications of their education. As this data indicates, demonstrating how academic skills and knowledge can be applied in the workforce, learners begin to understand the relevance of what they are learning.

Implementation of Interventions. In the fourth grouping of themes, the activities involved in, and timelines followed to transform a learning perspective were addressed. In the 'implementation of interventions, both 'targeted interventions for diverse learners' (the actions taken) and 'a clear pathway to progression' (timelines for actions to occur) are significant. Recognition of both the right action and best time to implement the action were represented between the identified themes in this phase of an advisement

conversation. See Table 8 displaying each of these themes, along with descriptions and examples.

Table 2

D. Implementation of Interventions Themes: Descriptions & Examples

Theme	Description	Examples
Targeted Interventions for Diverse Learners	Providing actionable, tailored resources and guidance	Selective resources to match needs or challenges
A Clear Pathway to Progression	Establishing clear timelines for achieving goals	Setting deadlines with follow-up expectations

Targeted Interventions for Diverse Learners. 'Targeted interventions for diverse learners' were a central theme involved in the implementation of learning interventions; descriptions for interventions were provided by 15 interview participants and 24 questionnaire participants. Related data included participant accounts of taking actionable steps to support diverse learners through tailored resources and interventions that targeted learning barriers. As one questionnaire participant (Lamb) explained further, "in working through many of these situations, I have developed empathy for every learner I work with and have learned that there is no template for working with learners as each is unique". This suggests by tailoring interventions to the individual learner, advisors help them create a narrower or broader (as needed) viewpoint. As well, an interview participant (Racoon) expands on this thought, indicating "I think it's an exciting time to be a part of advising and to help students to really navigate the possibilities of all that they are and all that they might become". With these contributions, participants were emphasizing the importance of developing targeted interventions to help students assess and reframe their challenges, build resilience, and reach success in their programs long-term.

An important dynamic of this process was descried by participants (INT=9; QST=11) as going beyond what is stated directly; this indicated advisors are encouraged to use targeted interventions with actionable steps to achieve their goals. As one interview participant (Quokka), explains:

> Generally my approach is to just make sure each student reaching out has what they need, so. You know, I just kind of want to try to pinpoint like what are they looking for. And then provide that in addition to anything else, I see that might be of concern.

With this approach the participant is showing respect for the needs the learner brought to the conversation, while also taking time to address other potential focus areas. Another questionnaire participant (Zebra) clarified "with this challenge I like to share to build that relationship and encourage the student to share in return. It makes the interaction more human, more two sided rather than robotic feeling". Participants readily provided examples of implementing 'targeted interventions for diverse learners' with varied reports of outcome successes.

A Clear Pathway to Progression. Though having a range of potential interventions was discussed frequently, 12 interview participants and 16 questionnaire participants provided clear timelines for program milestones. While aligning these milestones with the learners incremental markers for progress along the way was essential, it was clear finding the right time to implement different interventions was key. One interview participant (Bear) informed:

> If the student says, I need, you know, 2 weeks to identify an alternate plan. We're gonna give them that 2 weeks on the flip side, you know we are gonna ask them

> to kind of commit to some timelines there. With those types of goals and those types of strategies.

Within the described partnership, the advisors role would be to provide dynamic interventions that are manageable and likely for the learner to implement. The rationale for this was explained by one participant (Rhino) as:

> It's my responsibility to learn as much as I can about the student's day-to-day routines and give objective guidance on a plan of action that would be the least intrusive to their time… the student is then responsible to holding themselves accountable to the action plan agreed upon.

This data informs that having 'a clear pathway to progression' that enables the learner to take charge of next steps, is an important component of implanting interventions.

While the learner is acknowledged by participants as playing a significant role in driving the efforts, maintaining academic progression was described as requiring regular reassessment. Both the progress a learner has made and the effectiveness of the strategies they use were identified as significant to this theme. One questionnaire participant (Cheetah) explained "I set up progress checks to ensure that the student kept in communication with myself and their instructors." While an interview participant (Horse) further explained "this student of mine had struggled with the same class, and I had created a strategy we're in I will connect with the student on a weekly basis to keep them accountable to keep them on track." In addition to these explanations, a questionnaire participant (Platypus) noted "I do my best to frequently check in on my graduate students, especially the ones that I know are struggling" and further explained "but if the student does not want to do the work, there is only so much that I can do to keep them on

track". This data contributes to the theme 'a clear pathway to progression' by informing on the importance of strategically implementing transformative learning interventions.

Continuous Support and Follow-up. In the progression of steps involved in facilitating transformations in learners' perspectives, three significant themes (see Table 9) were identified; included are 'learning management and progress tracking', 'effective classroom engagement and self-management', and 'trustworthy and transparent relationship management'. Contributions from all (*n=53*) study participants were considered as part of the development of each theme. As well, these themes were grouped together as they related to a 'continuous support and follow-up' process described as significant to this research. Each of these three themes were described as uniquely contributing to and informing this research. Together, they also reinforce a collaborative advising relationship, which is based on 'continuous support and follow-up'.

Table 3

E. Continuous Support & Follow-up Themes: Descriptions & Examples

Theme	Description	Examples
Learning Management & Progress Tracking	Keeping records to track progress and maintain accountability	Referring to prior discussion notes, or setting reminders for follow-up
Effective Classroom Engagement & Self-Management	Supporting learners in managing their classroom experiences effectively	Discussing importance of group project participation
Trustworthy & Transparent Relationship Management	Building a trusting, open relationship	Being reliable to commitments set

Learning Management and Progress Tracking. The use of 'learning management and progress tracking' systems was noted by participants as contributing significantly to the process of facilitating transformations in learners' perspectives. Every interview participant (*n=18*) and most questionnaires (*n=27*) confirmed the use of some

form of tracking system. This theme included the systematic review and management of data like learner engagement and goal progress; this tracking makes it possible to view continuous support needs. One questionnaire participant (Walrus) informed “I'll usually check GPA, registration history, and ask how things are going in class. If they are solid in their class work and their GPA, I will not make suggestions for the student to make any changes.” While the importance of this act was further explained by an interview participant (Mule), who informed they “make sure they pass the class, I guess that's, the that's a system check… And them knowing that someone is actually, ‘She checking my grades, she checking to see how many times I logged in there’.” This indicates the learner benefits from having someone to check on their progress and hold them accountable with follow-up outreach.

More strategic system access also was identified when participants (INT=7; QST=18) described attempts to address underlying issues for learner barriers to progress. As was explained by a questionnaire participant (Lamb):

> [A] student felt they should not be penalized for content and links in the course being outdated and ended up failing to complete the course. While I empathized with the student, I tried to help the student realize that every time they pointed out an issue to the professor, it was resolved and the course was updated.

In this example the learner was held accountable to the prior knowledge they developed, which was available to the advisor due to tracking of prior interactions. In a more practical example, an interview participant (Jaguar) relayed:

> I color coordinate and put little notes and allow mark, mark my next meeting with them, or, you know, put the next date that I plan on outreach and check in. So I

> kind of keep track of my students in a more. Hmm not formal but, it's more individualized, I would say. As opposed to just kind of setting it or leaving it. And in the system. Then, I like to be more hands-on with, with that part.

Having a system for ‘learning management and progress tracking’ was a significant theme participants identified as part of the process to provide learners with ‘continuous improvement and follow-up’.

Another significant component of this theme was related to the innovative systems advisors used to enable learners to see their own development over time. Described approaches related to helping reinforce the idea that learning is a continuous process that gains value as learners gain confidence and experience. As an interview participant (Racoon) indicated:

> We have the robust systems now. Many universities are investing in the robust systems that help us to remember those conversations and track the conversations in a way that we're not even dependent on our humanity to pull those threads through and to remember them.

This indicates the documentation process can also be used to clarify goals and outlines measurable outcomes, helping learners stay focused on what they want to achieve in the end. The functionality of these systems was further detailed by another interview participant (Wolf), who stated “also there's a new tool that a lot of us are working with, that I actually helped build, that is an artificial intelligence tool, and it actually has a timeline”. With this data the participant explained capabilities to capture aspects of a student’s ‘learning management and progress tracking’ that are not necessarily obvious from a quick review of notes and system reports.

Effective Classroom Engagement and Self-Management. While the prior theme was advisor-driven, another important theme grouped within 'continuous support and follow-up' involved learners 'effective classroom engagement and self-management'. Included descriptions (from 17 interview and 23 questionnaire participants) informed of approaches an advisor might use to support learners in finding the best way to manage their classroom experiences. One interview participant (Lion) explained the significance of classroom engagement, stating:

> I think everyone in that class benefits from hearing from other people. So I would hope that you take that as a responsibility as well. If I want to be a good classmate, I want to be a and a classmate who who provides information and an experience for for my colleagues, for my for my fellow classmates, and then for the professor, obviously, that that is, that is law and order.

This indicates advisors facilitate transformation by assisting learners in understanding the importance of engaging with the classroom environment and learning network (i.e., class peers, faculty, and staff). It was also noted by a questionnaire participant (Monkey) that "sometimes a student may get caught up in the grade of each assignment instead of learning the course content overall". In this description, participants feel advisors can be show learners a process that empowers them to view the classroom not just as a space for passive learning, but as an environment where they can thrive.

Several participants (INT=4; QST=7) discussed their role in guiding the learner to manage their commitments by talking about and reflecting on their learning approaches and strategies. For example, an interview participant (Wallaby) explained:

> We want everybody to be an individual, but if it is something that we have resources for, and we're able to help a student through that hurdle… yeah, I think we should continue to at least address it… where we take it in a 'bite-sized' kind of thing. Like we're 'eating elephant one bite at a time' and we need to approach this from a way… work on just one element of whatever the issue might be.

This approach emphasized ways participants described reframing challenges for a learner, with the end goal of helping them better navigate issues as they arise. Managing this process involves understanding the classroom management capabilities of the learner, as a questionnaire participant (Rhino) explained:

> I assume graduate-level students at least have a functional working knowledge of typical productivity software applications... [and] how to effectively conduct scholarly research... however, after speaking with student for a certain amount of time, I can normally gauge how technically fluent most students are and adjust my advising strategies accordingly based on the individual student.

This is significant because it indicates offering structured support and strategies to learners can enable them to feel more confident in their ability to contribute meaningfully to class discussions, interact with peers, as well as engage meaningfully with course content.

Trustworthy and Transparent Relationship Management. As a unifying component to the 'continuous improvement and follow-up' step, a theme of 'trustworthy and transparent relationship management' was identified as unique and significant to this research. This theme frames participant (INT=14; QST=25) contributions indicating the importance of building a trusting advisor-learner relationship. It further describes the

benefits of creating a trust-based, transparent environment for communications. The impact of this is explained by one questionnaire participant (Deer) as:

> The student's reaction was grateful and appreciative of the transparency and support provided. I've learned as a Success Coach we don't need to fear being ourselves but maintain professionalism, acknowledge, and understand the students goals by the conversation today.

This demonstrates the development of a professional approach to collaborating with learners, which requires an advisor show trust in the learner. As a questionnaire participant (Clam) explains, “I let them set the foundation of our learning relationship and I take over from there.” Approaching learners in this transparent way also demonstrates an ability to be trusted as the advisor, as another questionnaire participant (Chipmunk) expressed “students who have already had a bad experience; their trust is gone and I must spend my time rebuilding that trust by being consistent, attentive, reliable and compassionate”. This indicates through the application of transparent and honest communication, advisors and learners can co-create solutions to current and potential future challenges.

Participants (INT=3; QST=3) further indicated a key aspect of creating the environment for a trustworthy and transparent conversation includes establishing a reliable, trustworthy relationship between advisor and learner. As one interview participant (Horse) indicated:

> When I tell them I haven't even perfected it. I'm trying to do it to the best of I can. But trust me, I'm still struggling with it… When I share that with them, I find that they're like, yeah, you know, I know what you're talking about. Thank you for

> sharing that. It makes me feel better that I'm not alone. So it's that camaraderie that I often hear when they know that. Oh, I thought it was only me. No, no, it's not only you, I. And they like that. They love that. Then they kind of realize that. Okay, so I'm normal. I'm not a failure, something like that.

This open exchange of experiences (and vulnerabilities) was described as helping learners build problem-solving skills but also as reinforcing awareness that their struggles are normal. Rationalization for this was provided by a questionnaire participant (Lamb), who indicated "learners generally feel more comfortable trusting your guidance if they feel connected to you or have gone through similar experiences as them". As such, the data indicates a strong advisor-learner relationship based on collaboration was indicated by participants as positively contributing to learners feelings supported, seen, and understood. Understanding this, as the relationship between advisor and learner deepens, a greater sense of confidence and resilience is developed in both.

Transformation and Retention. The themes of 'offering constructive feedback' and 'milestones on the road to mastery' work together in advisor-learner conversations to achieve the goal of 'transformation and retention'. This final grouping of themes is defined by a looping process which guides and motivates learners toward action. Each of these themes contributes to the discussion of 'transformation and retention' uniquely; every participant (*n=53*) contributes to these themes in some way. As **Table 10** outlines, the first theme emphasizes the dynamics of participant contributions which focused on an advisors' role in 'offering constructive feedback', while the second encourages the recognition of different 'milestones on the path to mastery' of desired learning or skills.

Together these themes represent the scope of transformations participants described as significant for academic advisors to engage a learner in perspective transformations.

Table 10

F. Transformation & Retention Themes: Descriptions & Examples

Theme	Description	Examples
Offering Constructive Feedback	Offering feedback to encourage growth and reflection	Providing suggestions based on experience
Milestones on the Path to Mastery	Celebrating all successes as part of the journey	Acknowledging successful completion of challenging course

Offering Constructive Feedback. As the party responsible for 'offering constructive feedback' regarding a learners' concerns or needs, participants (INT=16; QST=26) indicated advisors have a critical role in forming a feedback loop with learners. This data indicated constructive feedback can be provided to the learner, to encourage sustainable growth, reflection, and identification of important goals. In action, one interview participant (Mule) explains this process as "you know that best friend, that, that friend that tells you what you need to hear, not what you want to hear… that's kind of the relationship I try to have with my students". This was important, as questionnaire participant (Monkey) indicated, because "I have to remind them, grades are only a reflection of a single moment in time, what you understood at that moment and how you could convey that understanding". By reframing the situation as an opportunity the learner was able to see their mistakes less as failures, rather than as opportunities for growth.

Though relaying constructive learning feedback was noted as critical to this theme, a significant segment of participants (INT=13; QST=16) indicated it is up to the learner to take-in and utilize the advisement support provided. As one questionnaire

participant (Mouse) relayed “the most challenging part of transforming a learner’s perspective is getting a stubborn student to listen and accept feedback and suggestions.” In this, the participant draws a direct correlation between their own professional reflections and the discovery that learner willingness to accept feedback is significant to this research. This is expanded further by interview participant (Tiger), who stated:

> Everyone wants to have confidence in in what they're doing… Our students want to be able to look to us as the experts… If they have questions for us to be able to confidently get them to answer. Whether or not it's we're the right point of contact where we can get them to the correct place.

In offering this form of constructive feedback, the participant describes becoming another resource which the learner can rely on to reach their success goals. This theme was significant in describing the promotion of the ‘transformation and retention’, as part of facilitating strategic transformations in learner perspectives.

Milestones on the Path to Mastery. Similarly to the prior theme, ‘milestones on the path to mastery’ reflect the role of retention in transformation. Every participant (INT=18; QST=35) contributed at least one significant point related to milestones that learners might experience. This was sometimes described using subtle milestones, such as when a questionnaire participant (Whale) informed “I decided to encourage this decision. I agreed that this was the right decision, and we had a strong working relationship. They successfully graduated.” This informs of the decision process occurring, which results in simple opportunities for learner decision making. As well, this emphasizes the long-term accomplishment of successfully graduating. As an example of persistence to graduation, another questionnaire participant (Hedgehog) contributed:

> [A student] failed a couple of times. However when she failed and we would talk she said, 'I know I can do it.' She knew where she messed up but was willing to make it better! She graduated this Fall.

By focusing on these small wins, the participant informs it is possible for advisors to create value in individual milestones the learner might be able to achieve along their academic pathway. This exercise reinforced a more positive association with persistence toward long-term goals by leveraging the learners momentum to this point.

This theme further emphasizes the importance of celebrating small successes, to maintain motivation and momentum on the pathway to academic success. Participants (INT=15; QST=24) commented on the process of celebrating with learners, specifically addressing an importance of "just be[ing] there and just cheer[ing] them on" (Jaguar). Citing the support provided to learners during challenging times, participants emphasized their role in engaging with learners during times of great success or personal achievement. The barriers in this relationship were further explained by one questionnaire participant (Panther), who indicated "[the learners] are responsible for making choices that make them successful. I cannot do the work for them, but I can be on the sidelines cheering as they do!" In support of this, another interview participant (Kangaroo) informs:

> Advising is to be a cheerleader for these students and to be a guide… it's always important to put on that smiling face and gentle voice and to be there, and to cheer them on, and to keep giving them the best resources, sources, and information and guidance that you can.

Recognizing and appropriately celebrating the distinctive milestones learners achieve on the pathway to graduation, was a significant theme contributing to learner 'transformation and retention'.

Limitations

Reflecting on the limitations encountered during this study enabled a clearer understanding of the context for the analysis and reporting of collected qualitative descriptive data. The first limitation resulted from two modifications which were needed during the study, both to clarify or update terminology used in the recruitment materials (see *Introduction* section). An additional limitation resulted in participant pseudonyms needed to be changed post data collection, for the sake of clarity and confidentiality. Also, limitations unique to collecting interview and questionnaire data were each identified, which impacted the coding process. Lastly, the difference in depth of contributions between interview and questionnaire data was a notable limitation.

The limitations impacting this research led to expected impacts and constraints identified as significant to the investigation of transforming learner perspectives. While these limitations can be viewed as research weaknesses, in this study they are used to position the research approaches and designs used.

- Limitation 1:

  Two modifications were required throughout the course of the study, both to clarify or update terminology used in the recruitment materials. Firstly a modification was approved (5/27) addressing edits made to sentence fluency and a spelling error within the initial recruitment email. An additional modification was approved on 6/28/2024, to add an excerpt into the recruitment reminder email template. This modification was necessary as of 1 month (four weeks) from the start of data collection. Only four questionnaire participants had submitted full contributions to this point, while the target sample of interview participants had been exceeded. The intent of this modification was to encourage greater participant engagement with the questionnaire. Both modifications to recruitment materials were approved in advance of being used in the study.

- Limitation 2:

  Initial pseudonyms chosen by participants were used throughout data collection and later changed by the researcher to improve consistency and confidentiality. Partially this was because of the researchers' familiarity (via personal relationships and experiences) with many of the participants, which was distracting and could lead to potential bias during analysis. Another reason these names were changed was because several different sets of participants chose the same (or a similar) name. Three participants all requested "Robert", two requested "Joy" (after their individual pets), and seven others chose variations of their known names. Whether out of participants' desire to contribute, or lack of concern for having their name identified in this research, unified naming was necessary. Animal names were used for the final pseudonym naming, as they allowed for the use of a single, unique term to identify different participants. As well, this naming structure is educationally minded, while remaining unique enough to maintain participant anonymity.

- Limitation 3:

  When analyzing data for both interviews and questionnaires, unique limitations occurred impacting the coding process. At the beginning of the second analysis step of analysis (see *Data Analysis Procedures* section) an additional step was taken when applying codes to the interview transcripts. This 'administrative data' was used to identify different components, including interviewer comments and orientation of individual research questions. However, this data was excluded from analysis because it was not a part of the research; content within the data was otherwise coded to capture meaning in response to the research questions. Additionally, some of participant submissions to the questionnaire were unexpected. Two participants indicated they did not encounter either resistance or transformation with learners, though each further provided examples of when they had experienced this phenomenon. These answers are potentially the result of limitations in the study design or recruitment processes, such as questions posed which may have been confusing, or participant resistances, and lacking clarity on study scope.

- Limitation 4:

  Additionally, differences in total contributed data between interviews and questionnaires was a further limitation. Presence of the researcher within the interview space helped draw out more detail, where the self-guided questionnaire resulted in less detailed data. This limitation resulted in the researcher identifying a third of the total codes across questionnaires data as compared to with interviews. When reviewing the style of communication between questionnaire and interview transcripts, the style and tone used by participants differed. While the interviewer was able to gather added detail about research questions in the moment, this follow-up inquiry questioning process was not possible via the questionnaire structure. Differences in the depth of contributions between the data

sets were significant, but they did not negatively impact the study, due to the quality of details provided in each set.

Summary

Chapter 4 detailed the data analysis procedures used to facilitate this study, including how data was compiled, organized, and interpreted. Using a qualitative descriptive approach, this study involved the collection of 18 semi-structured interviews and 35 open-ended questionnaires. To investigate this phenomenon, detailed stories of prior challenges, and explanations of advisor thoughts and feelings are needed. The research questions the data was analyzed to understand include:

RQ1: How do advisors decide 'when' and 'how' to transform a learners' perspectives?

RQ2: What is involved' in facilitating transformations in graduate-level learner perspectives?

Analyzing this data from a reflexive thematic approach, 23 notable themes were identified, of which 8 address the first research question and 15 address the second. This research investigated experiences intervening with and facilitating transformations in learner perspectives by collecting first-hand accounts from experienced advisors.

An important takeaway from this study is that ‘transformation is both the destination, as well as the journey’. This overarching theme describes the essential information presented by the data analyzed and informs the relevance to each research question. Transformation is the destination described by participants to explain their goals when interacting with learners. Participants describe transformation in this way, as the goal they are seeking to achieve, though the reality of each end-result is unique to each learner situation. Additionally, this research indicates the act of transformation is equally as valuable as this end goal. Transformation as a process that can be observed,

was identified within this study as a separate and significant process. The analysis of this data indicates transformation is important because it promotes lasting change, empowering individuals to grow, adapt, and reach their full potential.

Chapter 5: Summary, Conclusions, and Recommendations

Introduction and Summary of Study

This study explored an important dynamic of advising adult learners, the promotion of positive change. As academic advisors guide, support, and service the needs of diverse adult learner populations, their focus on facilitating effective transformations was described throughout this research. Participants confirmed that while learners are ultimately responsible for their own actions, advisors can intervene to promote activities which can help the learner retain and succeed in an academic program. To understand how remote academic advisors describe facilitating transformations in graduate-level learner perspectives, semi-structured interviews and open-ended questionnaires were collected. This study reviewed two research questions: when and how (RQ1) as well as the steps involved (RQ2) in advisors' facilitating such transformations, at one state-affiliated, public institution in the Middle Atlantic states.

Interactions advisors have with learners were identified as a primary method for remote engagement. Therefore the focus of this research was on academic advisor perspectives regarding their experiences having engaged with learners through different phases of an academic program. Factors impacting learner success were discussed from the first-person perspective of experienced (2+ years) advisors working in remote environments. This study served to collect clearer descriptions for the experiences of advisors as they interact with graduate learners due to the professional capacity of learners at this level. Transforming a learners' perspectives was described as a critical responsibility of the advisor role, though the learner was noted as responsible for ultimately acting on out transformations.

The purpose of this qualitative descriptive study is to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations. Due to the rich descriptive detail sought, the qualitative descriptive design was the most appropriate strategy for exploring academic advisors' descriptions of the strategies they use to facilitate learner perspective transformations. To analyze this data, a reflexive thematic analysis process was applied to each, then the synthesized data set was further organized into critical themes addressing each research question. These descriptions were used to bring clarity to the experiences advisors encounter when intervening with learners in attempts to transform their perspectives. The following sections present a summary of findings, conclusions, implications, strengths and weaknesses, recommendations for future practice and research, and a reflection on the dissertation process.

Summary of Findings and Conclusion

Overall Organization

In this section, a summary of the study findings is presented. To understand how remote academic advisors describe facilitating transformations in graduate-level leaners' perspectives, this study evaluated two primary research questions:

RQ1: How do advisors decide 'when' and 'how' to transform a learners' perspectives?

RQ2: What is involved' in facilitating transformations in graduate-level learner perspectives?

Significant themes organized from analysis of the collected data are discussed, including conclusions made based on distinctive, frequently discussed participant contributions. As well, further relationships are identified between the study findings and the problem

space. Throughout the section evaluations are made and supporting conclusions used to inform how this research contributes to the body of knowledge relating to advisors facilitating transformations in learner perspectives.

RQ1: When and How Advisors Transform Learners' Perspectives. Eight distinctive themes addressed the first research question, of which three addressed 'when' and five addressed 'how' learner perspective transformations are facilitated. Initially, 'when' advisors described transforming learner perspectives was described by three themes, including 'critical points along the journey', 'strategic situational assessment and awareness', and 'resistances to learning and transformation'. Critical points occur along a learners academic journey (i.e., challenges, milestones, or major transitions), which were notable for advisors due to the increased likelihood to shift perspectives during this time. As these points occur, descriptions indicated an advisor assesses specific situations that prompt reflection and help change a learners' reality towards a more desirable state. By further identifying and addressing a learners' resistance towards change or new perspectives, the advisor is better able to decide appropriate timing for and application of strategic interventions.

Collectively these three themes informed of the appropriate timing for an advisor to attempt facilitating an intended transformation. A critical component of participant descriptions was noted as the understanding that transformation cannot occur without the presence of resistance. When a learner experiences resistances, an opportunity is open for the advisor to influence their decision making and future behaviors. Finding the right timing to introduce and encourage a transformation was also described as significant by participants. These findings indicate advisors must predict when during a conversation is

best for specific interventions. As well, it is indicated that an advisor must understand what types of interventions are appropriate based on when a conversation takes place within the academic program lifecycle.

An additional five themes addressed ‘how’ advisors describe facilitating transformation in learners’ perspectives. Themes included ‘co-created learning and advising roles’, ‘transformative advisement approaches’, ‘motivation-driven learning mindsets’, ‘empowered self-transformation’, and ‘emotionally intelligent cognitive transformation’. The readiness of learners to embrace new ideas and experiences was highlighted, in addition to the strategies successful advisors use to assess a learners’ reality. This information was described as useful for influencing a learners’ motivation, which is crucial for perspective change. In this role advisors foster an environment where learners feel empowered to explore new viewpoints and take charge of their learning. Acknowledging the role of emotions in learning, advisors were indicated as affecting how perspectives are transformed using emotionally intelligent approaches.

In combination these five themes explore essential components of an advisors’ decision to act in effort to transform the learners’ perspective. They inform of a collaborative relationship where advisor and learner must work together to co-create plans, which the learner would follow to effect positive academic change. While emotions were noted as a significant guiding influence on this process, distinctive mindsets were indicated as needing to be assessed to identify a learners’ strengths and capabilities. In comparison, learner motivations are assessed and developed as a part of the advisor empowering learners to self-transform over time. Each of these themes

contributes to inform of the decision advisors make related to how best to approach transforming a learners perspective.

RQ2: What is Involved in Facilitating Transformations in Learners' Perspectives. Findings from the data collected in this study indicated 15 themes addressing the second research question. In assessing how these themes compared, a clear pattern was evident for groupings of two to three themes. Groupings of themes included 'ensuring advisement relationships', 'reflection and assessment', 'planning and strategy development', 'implementation of interventions', 'continuous support and follow-up', and 'transformation and retention'. Each grouping indicated important concepts, outlining distinctive steps which follow the flow of a conversation between learner and advisor.

The initial step in a conversation being the creation of 'enduring advisement relationships', which includes three distinctive themes ('every conversation is a different conversation', 'reflective inquiry', and 'interpretive advisement frameworks'). To advise learners towards intended transformation, it is important for advisors to understand that every conversation is a different one with learners, informing the need for different approaches for unique learner needs. Through reflective inquiry, advisors describe using open-ended questions to encourage self-reflection and deeper thinking, as well as active listening to help with the development of learner understanding about current perspectives and challenges. Each of these activities builds the framework upon which an advisor interprets future advisement decisions. These initial themes describe enduring advisement relationships, which was notable as the initial required step for facilitating transformation.

Two additional themes were significant together as a grouping, forming the next step of advisor-learner engagements, known as ‘reflection and assessment’. Various acts of reflective practice were identified, such as potential continuous improvement and barriers to learner progression. These assessments of learner behavior and situations were critical to the act of facilitating a transformation in learner perspectives by encouraging long-term reflection their experiences. As a result, advisors described learners as making more informed decisions. As well, advisors gain an understanding of what approaches may be used and the likelihood for different outcomes. Understanding what hinders learners from achieving their goals is an important aspect of advisor assessment, as this process can lead to more meaningful reflections, despite the unique needs of individual learners. In this second step of advisor-learner interactions, ‘reflective practice for continuous improvement’ and ‘barriers to learner progression’ were notable themes as part of the process to transform a learners’ perspective.

As the next step in an interaction, ‘planning and strategy development’ included three themes significant to promoting action in learners. Included themes addressed ‘personalized and adaptive goal alignment’, ‘exploring opportunities for academic progress’, and ‘bridging education and career pathways’. Advisors described the importance of collaboratively setting goals that align with a learner’s vision and aspirations. By exploring different pathways and potential outcomes available to a learner, the advisor was noted as helping broaden perspectives about learning opportunities. Linking personal development to career aspirations was further noted as effective for advisors when guiding learners toward taking practical steps to improve specific knowledge and capabilities. As a result of intentional planning and strategy

development, advisors help graduate learners identify ideal transformations for their academic and career aspirations.

With a strategic plan in place, the next grouping of themes related to the 'implementation of interventions'. Notable themes included 'targeting interventions to match the diverse needs of learners', as well as identification of 'a clear pathway to progression'. By taking actionable steps to support learners through tailored resources and guidance, the findings from this study suggest advisors play a key role in facilitating transformations in learner perspectives related. This indicates intentional goal setting with a learner is critical to providing effective advisement support. Establishing clear timelines for achieving goals provides further structure to this process. Implementing actionable steps towards a particular academic goal leads learners to understanding how to take future actions that may benefit them long-term.

Managing how learners are progressing towards goals is an important next step in the process to facilitate transformation in learner perspectives. Themes related to 'continuous support and follow-up' included 'learning management and progress tracking', 'effective classroom engagement and self-management', as well as 'managing trustworthy and transparent relationships'. Initially, by keeping clear, detailed records of discussions between advisor and learner, tracking real-time progress, and maintaining accountability was described as an impactful ways advisors and learners develop relationships. Advisors then support learners in managing their classroom experiences effectively, to overcome challenges, reframe unhealthy perspectives, and better inform future decision making. Building a trusting advisor-learner relationship that encourages open dialogue was indicated as critical to long-term learner success.

In the final phase of grouped themes (‘transformation and retention’) the desired state of learner perspective transformation was discussed. While retention was often considered the goal of transformation, developing effective learning and life skills was also noted as an important, desirable outcome. Two distinctive themes were grouped into this final step, including ‘offering constructive feedback’ and ‘milestones on the path to mastery’. By offering constructive feedback that encourages growth and reflection, advisors were described as driving the transformation and retention capabilities of diverse graduate-level learners. Different strategies were discussed, with varied degrees of effectiveness per student needs and goals. Advisors celebrating small successes with learners are far more effective at helping them maintain motivation and momentum long-term. Understanding the flow of interactions between advisor and learner can inform how impactful advisement will be this study confirms the effectiveness of discussed steps as part of facilitating transformations in learner perspectives.

Reflection on the Dissertation Process

In reflecting on the processes followed for this study, specific design, collection, and analysis choices were influential on the research findings. The initial design approach, along with methodological dynamics, influenced the progression milestones for the study. As well, distinctive communication strategies used by participants informed of a tribal language and body of knowledge unique to academic advisors. Lastly, this section discusses how participants (and the researcher) navigated the ambiguous concept of ‘transformation,’ especially given its multiple definitions and potential real-world applications within the advisor-learner relationship. With reflection on the dissertation

processes followed, it is clear how the design, collection, and analysis choices made, influenced resulting findings.

Initially, the study was approached from a more linear perspective, believing that data collection and analysis would proceed smoothly once the foundational steps were in place. It quickly became clear though, that research is an evolving, dynamic process, where flexibility and adaptability are essential to long-term success. While each iteration was more time intensive than expected, other gaps in the evaluation process led to further delays due to the extensiveness of each review. With added time, it became clear that other aspects of the problem space could be further researched with a mixed methods or quantitative study. This experience informed the research process as one marked by discovery, requiring ongoing critical thinking, strategic reflection, and flexibility. As a result of careful approaches to data collection and analysis, findings collected for this study are meaningful and lead to detailed conclusions for this problem space.

In conducting this study, it was a pleasant experience to engage with participants in a way that allowed their voices to emerge naturally. This process enabled more authentic discussions which presented both challenges and insights related to the influence advisors have over learner action. The followed processes highlighted the importance of remaining open to unexpected findings, allowing the data to guide interpretations rather than trying to fit them into preconceived notions. It also informed designing a study requires not only refining effective research questions but also considering the ethical and practical implications of investigating advisor experiences interacting with learners. The two research questions established for this study were effective due to leading to greater participant self-exploration of the topic space.

Throughout the data collection process, unexpected barriers were encountered, such as difficulties using participant-chosen pseudonyms and gaining substantial descriptive detail from interviews (as compared to questionnaires). Challenges experienced helped to develop better strategies for overcoming obstacles and led to a deeper appreciation for the importance of trustworthiness and reflexivity in qualitative research. The data analysis phase was equally revealing, as coding techniques had to be refined and expectations for how long each step of analysis would take, adjusted based on the reality of exploring developing themes from the collected data. It became clear throughout the analysis process, that initial perceptions of research as a structured, controlled endeavor, needed to be transformed. This qualitative research has created of a profound understanding for the complexities of investigating certain phenomena. As a result of this experience, there is greater awareness for the obstacles and approaches effective for advisors seeking to transform learner perspectives.

Implications

As a result of the contributions made from this research, the experiences of academic advisors interacting with learners in need of a transformed perspective is clearer. In this section, the implications of this research are further explored. Topics included review the theoretical, practical, and future research implications from this study, as well as a critical evaluation of related strengths and weaknesses. New insights gained from the collection and analysis of data in this study are examined for interpretation in the field of adult learning and development. Applications of transformational advisement theory are further evaluated, along with references from the

current study into how future research may be impacted. The implications from this study may impact the future of advisement practice, policy, and theory.

Theoretical Implications

Transformative learning stands out as a foundational theory for adult learning and development because it addresses critical areas of needed support. Jack Mezirow (1978), who was later deemed the father of transformative learning, indicated that adults engage in many kinds of regular learning transformations, such as how to act, how things work, and what is expected of an individual in different environments. In the transformative learning process, meaning perspectives (or frames of reference) are elaborated upon through social interactions between the learner and anyone in their learning environment (like peer learners or faculty). A transformative approach to advising learners can have benefits, including more accurate identification of learner perspectives and easier facilitation of learner perspective transformations (Howard et al., 2019). In 2003 Mezirow revised his initial theories of transformative learning, which has since developed into a commonly acceptable model for researching educational phenomena.

A transformative approach to academic advising was indicated as enabling learners to cultivate agency in their learning. At the same time, the advisor promotes knowledge development by identifying what potential barriers the learner may be facing. It is clear from this research that a students' perceptions of the learning environment can influence their progress in courses. This research also highlights how important it is for all involved (i.e., advisors, learners, staff), to understand the experiences of advisement professionals supporting diverse learner populations. This study identifies a transformative approach to advisement creates opportunities to identify academic advisor

experiences and gain descriptions of how these professionals engage with learners to influence their perspectives.

As a primary support role for students, the advisor was noted as modeling ideal social interactions in this study. Out of these interactions, the learner would form new perspectives (or habits of mind), based on their ability to reconcile, and synthesize the new information they receive from their learning environment. As new knowledge is introduced, it must be reconciled with prior knowledge, either by synthesizing the two or replacing the old information. This research study confirms the structure and format of these advisement approaches. In contributing to the total body of knowledge on this topic, the present study informs of both when and how an advisor might decide to intervene with a learner. As well, the steps involved in facilitating such transformations in learner perspectives are further confirmed with this data.

The use of Braun and Clarke's reflexive thematic analysis process is another implication to be considered. As the researchers' subjectivity was critical to the scope of this study, this theoretical approach was most appropriate. Conceptual thinking related to critical study design components (i.e. research questions or data collection) help researchers to contribute effective qualitative psychology research (Braun & Clarke, 2022a). Findings can be used to support the application of a reflexive approach to thematic analysis, as an effective means for investigating academic advisement phenomena. As well, this study contributes to the recognition of benefits to leveraging researcher subjectivity in study designs, data collection, and analysis procedures. Due to the researchers subjective interpretations of the data, the theoretical implications from

this research may inform design and implementation structure of related studies into the future.

Practical Implications

This research informs of a structured process which institutional leaders may use to better estimate the contributions and effectiveness of individual advisors. Innovation of advisement processes remains important to institutional leaders, particularly during unpredictable political and economic times. Findings collected from the current study can benefit the practical integration of systems and processes aimed at guiding advisor approaches to different learner barriers. The lack of a 'one-size-fits-all' approach should be understood when implementing communication structures or training advisors related to the quality of their interactions with learners. With reflection for the rich descriptive detail participants shared to relay their experiences, this research implies professionals must approach their own knowledge development from a practical, yet flexible frame of reference.

An additional way the current research informs of practical applications for learner perspective transformation is the understanding of a structure advisors described as similar across all conversations. The synthesized themes (15) identified as addressing the second research question also contained a logical flow of how interactions might occur between advisor and learner. Despite the learning need or total list of topics to be discussed, the same general flow of steps (6) was described by participants. Using this data, practitioners can better understand potential options for continuing a conversation towards positive, empowering transformation. As well, understanding the flow of

advisement interactions can inform of important missing data which could influence whether a learner effectively understands the pathway to reaching their long-term goals.

Future Research Implications

Implications for future research are influential, as the findings in this study support the validity of researching advisor experiences interacting with learners. Recommendations for future research were observed from what this study was able to do for this field of study. Future research implications indicate positive opportunities to explore other special learner populations (i.e., high risk or undergraduate learners) and how expanding to a mixed methods or quantitative approach might enhance this body of knowledge. As well, by collecting data from both learners and advisors, future research can increase total knowledge of perceptions rather than relying on advisors observations. Lastly, the integration of archival data sources to enhance meaning and draw more effective correlations to actual learner outputs in courses/programs would improve future opportunities to expand on the current research.

Strengths and Weaknesses of the Study

Reflecting on the methodology, research design, and data analysis, key strengths of the study include the collection of rich, descriptive data from diverse advisor perspectives. Findings contribute deep, meaningful insights related to advisors' experiences transforming learners' perspectives. With this depth of detail, advancement of knowledge in the field of adult learning and development is made easier. The thoroughness of data collected allowed for the experience of facilitating adult learning to be better understood, including the recognition of specific, contextually relevant approaches to advisement in remote learning environments. Robust data also ensured a

more comprehensive analysis process, offering new perspectives that enhanced professional understanding of advisors' experiences facilitating change in learner activities. A major strength of these findings is seen in the added value to the existing literature.

It must also be noted there were weaknesses in this study that must be addressed in future research. While the anticipated sample size was achieved, integrating additional data sources to demonstrate real-time activities of learners may have limited the generalizability of the findings. Additionally, while the data collection process was comprehensive, certain limitations arose due to a lack of opportunity for the researcher to ask probing or follow-up questions in the questionnaires, limited the depth of inquiry. These factors may have impacted the richness of the final dataset and the overall depth of analysis. Given these considerations, the conclusions drawn from the study should be interpreted with an understanding for the variability of this practice.

Recommendations

This study collected qualitative descriptions of remote academic advisor experiences facilitating transformations in graduate-level learner perspectives. Recommendations for future research are discussed in this section. Suggestions include duplication of this study with other special learner populations, expanding to a mixed methods or quantitative approach, and collecting data from learners in addition to advisors, as well as via the use of archival data. Each of these recommendations for future research would provide further context and opportunities to expand the scope of understanding for this problem space. Findings from this study further contribute

recognition for a need to continue investigating the experiences of remote academic advisors, as they interact with and guide the activities of learners.

Recommendations for Future Research

The study could be duplicated with other learner populations (i.e., undergraduates, or learners on academic probation, etc.) to enhance understanding of advisors' experiences facilitating learner perspective transformations. In the identified problem space, conducting a similar study with different learner populations can allow for direct comparison and additional insights based on individualized needs of different learner populations. Other parameters could also be adjusted (other than population) such as the institution demographics (i.e. small, private institution or geographic location). As a result of further research, clarity can be gained for how and when advisors' might decide to intervene to influence the perspectives of different types of learners. Understanding how special populations of learners are impacted can provide insight into the experiences of advisors and institutional staff as well. This information may then be used to guide future practice and policy across higher education.

Another recommendation for future research would be to expand upon this qualitative framework, to conduct a quantitative or mixed-methods study related to this problem space. While participants' rich descriptions of their experiences as an advisor were effective for the scope of the current study, future research would benefit from collecting statistical data. The primary benefit of conducting quantitative research (statistics) is to provide objective, reliable review of trends in behavior. This additional set of data may better inform of the decision-making structures in place for remote

academic advisors, guiding their practices as they interact with and attempt to transform learner perspectives.

Expanding beyond academic advisor perspectives is another recommendation for future research. Though the scope of the current study collected data from advisor perspectives only, it would be beneficial to collect future perspectives from learners as well. Understanding what transformed learning perspectives feels like, as the individual committing to the transformation, would add valuable knowledge to this field of study. In addition, learner reports of when transformations were not effective or necessary may add further context to understand this phenomenon. The combination of both advisor and learner perspectives in one study may also add dynamic quality to future research, allowing for direct comparison and contrast of perspectives shared.

Reviewing archival data is a study design approach recommended for future research. Viewing historical trends via different tracking systems accessible to advisement staff would add to the scope of this research. To understand the experience of transforming a learners perspective, systems that may be used to collect archival data include the online classroom (D2L), customer relationship management (CRM) system, and/or end of contact surveys. Monitoring learner engagement and activities via the D2L system could inform of just-in-time intervention needs and outcomes post-intervention. Additionally, within the institutional CRM system the tracking of long-term activity and contact notes can provide real-time data showing when and how transformations occur. Learners satisfaction with and impressions of advisement might also be collected using surveys post-contact. Each of these archival data sources are recommended as potentially valuable for future research related to this problem space.

The next step recommended for future research related to this problem space, is the exploration of how advisors facilitate transformations in the perspectives of different learner populations. As well, it is recommended that a quantitative or mixed-methods version of this study be conducted in the future. While both options would enhance the scope of data collected, another next step that would benefit this field of research would be to include learner perspectives. While advisor perspectives were integral to the current study, future research could benefit from a comparison and contrast opportunity between learner and advisor perspectives. The review of certain archival data might also be an impactful in viewing historical trends and events related to learning perspectives. Each of these future research recommendations could serve as a valuable next step for researchers in this field.

Recommendations for Future Practice

This study sought to understand how remote academic advisors at one state-affiliated, public institution in the Middle-Atlantic states, describe facilitating transformations in graduate-level learner perspectives. Future advisement practice can be informed by the findings of this research, including the understanding that transformation is not just a desired outcome but also the pathway a learner takes to achieve that outcome. Future practice can benefit from the co-creation of learner goals, with action plans to identify manageable incremental milestones. As a developmental theory for academic advisement practice, this understanding can guide future research and activities related to adult learning and development.

Another recommendation for future practice was informed by participants' consistent use of strategies like storytelling and metaphor to relay detailed impressions of

their experiences. This can inform future training and development practice within the institution, as this indicates of an effective means for relaying objective details about effective advisement strategies. The presence of a distinctive tribal knowledge shared among advisors was described as critical to guiding the actions of learners. Frequent identification of 'meeting the learner where they are' indicated the potential for a shared language used by participants. Future advisement practice could be informed by the purposeful use of shared experiences and approaches, formed from further exploration of these advisement structures.

The third important recommendation for future practice from this study is the understanding that transformation is not always required. Findings support the understanding that transforming some perspectives related to learning can lead to beneficial outcomes for both the learner and advisor. Recognizing that the learner must decide what transformations they are willing to engage with, the data collected in this study indicates learners do not always decide to transform. In these instances the advisor must acknowledge that they are not responsible for the end decision a learner makes, they can only provide information and options. As a recommended future practice, advisement professionals may use this research to guide their decisions related to transforming learners' perspectives.

Holistic Reflection on the Problem Space

The phenomenon being investigated in this study was how remote academic advisors describe facilitating graduate-level learner perspective transformations. Understanding this problem included how and when advisors might decide to intervene with a learner in attempts to transform their perspectives about something, as well as the

steps involved. How advisors engage with learners to assess when and steps taken to transform their perspectives, were central to this problem space. This research supports the understanding advisors work with diverse groups of adult learners to resolve a range of academic challenges. To achieve this initiative, advisors must identify opportunities for guiding learner perspectives and make concerted efforts to engage learners in proactive decision-making related to ideal transformations.

Data collected indicates the timing and approach of different transformations are important. Critical milestones occurring throughout an academic program, informed of focused outreach to learners. Additionally, the identification of different resistances during interactions with learners was impactful on informing of the timing of a transformation. Dynamics that informed of the right approach to facilitate a transformation were described as most effective when co-created between advisor and learner. The data also informed of significant phases of advisement interactions, across which facilitating transformations in learner perspectives might occur in a typical conversation. Significant themes described by participants to address the research questions in this study contributed relevant data to inform of the dynamics of these experiences.

The current study contributed to the understanding of how remote academic advisors facilitate transformations in graduate-level learner perspectives via first-person descriptions of these experiences. These accounts were needed to address the identified problem space with rich, subjective detail. This research further contributes knowledge to improve understanding of this problem space by further highlighting how relationships with an advisor inform learner behaviors. The facilitation of learner perspective

transformations is understood as meaningful to the success of adult learners in remote graduate programs due to contributions from this research. The current study also contributes justification for continued review of research related to this field of study.

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Appendix A.

Ten Strategic Points

Strategic Points Descriptor		Learner Strategic Points for Study
1.	Dissertation Topic	This study explores how remote academic advisors describe facilitating graduate-level learner perspective transformations.
2.	Literature Review	Academic advisors guide, support, and service the needs of diverse adult populations. To effectively guide a learners' actions advisors must continually monitor their activities and engagement in the classroom (Klempin et al., 2021). While learners are ultimately responsible for their own actions, advisors can intervene to promote activities which can help the learner retain and succeed in an academic program. This study focuses on one aspect of advising learners, facilitating learner perspective transformations. As adults learn new information, they must find ways to reconcile it with their prior knowledge, resulting in a transformed perspective (Mezirow, 1978). While the United States has produced more than half of all literature on graduate online learners' experiences in the past two decades, only 5.2% of research reviewed phenomena from the perspectives of advisors and related staff (Martin et al., 2022). To better understand the experiences of learners as they interact with and support graduate learners from remote environments, this study seeks to gain the perspectives of remote academic advisors as they transform the perspectives of learners they support.
3.	Problem Statement	It is not known how remote academic advisors describe facilitating graduate-level learner perspective transformations.
4.	Sample and Location	According to the U.S. Bureau of Labor and Statistics (2023), the academic advisement and coaching profession now exceeds 342,400 employees. Within this larger population of advisors, 56,490 workers are employed at institutions in the 6 states of the Middle Atlantic states, which includes Delaware, Maryland, New Jersey, New York, Pennsylvania, and the District of Columbia. Therefore this study seeks to sample how advisors at the only fully remote and one of the largest institutions in this region (B. Allen, personal communication, May 17, 2023), experience the identified phenomenon. There are currently 412 advisors employed at the identified institution in the Middle Atlantic states. Within this sample population, 30-35 advisors will be selected to contribute data, including 12-15 interviews and 18-20 questionnaires.
5.	Research Questions	RQ_0: How do remote academic advisors describe facilitating graduate-level learner perspective transformations? RQ_1: How do remote academic advisors decide when and how to transform a graduate-level learners' perspectives? RQ_2: What is involved in remote academic advisors' facilitating a transformation in graduate-level learners' perspectives?
6.	Phenomenon	This study seeks to understand how remote academic advisors experience the phenomenon of facilitating graduate-level learner perspective transformations. Research confirms strategic advising interventions can enable learners to develop skills which lead to greater academic efficiency (Mekouar et al., 2022). Transforming

Strategic Points Descriptor		Learner Strategic Points for Study
		a learners' perspectives requires action from the learner, however the academic advisor also plays a role in facilitating this process. Advisors ask iterative phases of questions to promote micro-transformations in learners' thoughts and feelings, followed by allowing the learner to elaborate on their own perspectives (Gopaldas et al., 2021). While these efforts may positively impact learners, how academic advisors experience different aspects of advising needs further research. How remote advisors experience facilitating perspective transformations in a graduate-level learners is the phenomenon of interest for this study.
7.	Methodology and Design	Qualitative methodology / Descriptive design The qualitative descriptive design is most appropriate for when a phenomenon being investigated requires gathering rich, comprehensive descriptions of a subjective experience. In a qualitative descriptive design structure, a poorly understood phenomenon would be described at a manifest, overt level (Chess, 2020) Qualitative descriptive studies seek a full understanding of an event through straightforward descriptions provided by those with first-hand knowledge of the experience (Sandelowski, 2000). Due to the rich descriptive detail sought, the qualitative descriptive design is the most appropriate strategy for exploring academic advisors' descriptions of the strategies they use to facilitate learner perspective transformations. These descriptions can be used to concisely provide a clear picture of the activities and strategies advisors use to facilitate a transformed perspective in graduate-level learner populations.
8.	Purpose Statement	The purpose of this qualitative descriptive study is to understand how remote academic advisors describe facilitating graduate-level learner perspective transformations.
9.	Data Collection	Semi-Structured Interviews 12-15 virtual and audio interviews would be conducted via Zoom (will also be recorded and transcribed via this system) For confidentiality: Advisors will be provided an informed consent document to sign prior to participation. Screen names would be changed to coded names (i.e., Interview 1, Interview 2, etc.). There would be discussion at beginning of each interview, to remind of FERPA guidelines and remind participants they are free to cease participation at any time. Open-Ended Questionnaire 18-20 questionnaires facilitated via SurveyMonkey. Advisors' will be contacted via email and reminded/encouraged to contribute feedback bi-weekly, until 18-20 responses have been gathered or for 2 months. For confidentiality: Advisors will be provided an informed consent document to sign prior to participation. Anonymous reporting feature in SurveyMonkey would be used for confidentiality.

Strategic Points Descriptor		Learner Strategic Points for Study
		There would a statement at the beginning of each questionnaire, to remind of FERPA guidelines and remind participants they are free to cease participation at any time.
10.	Data Analysis	Reflexive Thematic Analysis (Braun & Clarke, 2022b): Step 1: Familiarization with the interview data Step 2: Initial coding of interview data Step 3: Initial theme generation Step 4: Repeat steps 1-3 for questionnaire data Step 5: Synthesis of generated themes from both sources Step 6: Theme refining, defining, and naming Step 7: Data is written-up as a report

Appendix B.

Site Authorization (Initial)

Sunday, October 22, 2023 at 17:09:02 Mountain Standard Time

Subject: RE: Megan Kral Dissertation - UMGC Success Coach Participants
Date: Wednesday, September 27, 2023 at 1:29:54 PM Mountain Standard Time
From: Susan Hawkins-Wilding
To: Megan Kral
Attachments: image001.png

I discussed with the Directors and they also support this. I would suggest a cross section from each Director group and they would be able to provide you names if/when you move forward with this.

Susan Hawkins-Wilding
Vice President for Student Success
University of Maryland Global Campus
3501 University Boulevard East | Adelphi, MD 20783
E: susan.hawkins-wilding@umgc.edu

UNIVERSITY OF MARYLAND GLOBAL CAMPUS
Formerly UMUC

From: Megan Kral <megan.kral@umgc.edu>
Sent: Monday, September 25, 2023 5:45 PM
To: Susan Hawkins-Wilding <susan.hawkins-wilding@umgc.edu>
Subject: Megan Kral Dissertation - UMGC Success Coach Participants

Hello Susan,
I hope you have been well!
My outreach here is because I am working on my application to conduct institutional research at UMGC for my dissertation as part of my Ph.D. program. You were so helpful in discussing my plans for this prior (many months ago) and I am so very grateful for the guidance you provided at that time!
As I prepare to submit this application, I need to show confirmation (an email) from the department lead to confirm that it would be acceptable for me to conduct this study with our success coaches as the participants. The intended data collection methods I would be using include interviewing 12-15 coaches plus a questionnaire to be completed by 15-20 additional coaches. Only coaches would be involved, with no direct contact to our learners.
The topics to be discussed will describe how our coaches experience the process of facilitating a transformation in learners' perspectives. While this can include altering the learner's perspective to improve academic performance and retention, this may also include revising how they think about their engagement with peers or feedback from instructors. The purpose of this study is to better understand the experience of assessing the learner and their academic status, determining if/when an alternative perspective is necessary, as well as the activities and strategies used to facilitate perspective transformations in learners.
I would love an opportunity to discuss any questions you may have. Or, if you are open to the prospect of this study within the division, can you please reply here so that I may use this as

official notice that we corresponded. While the study proposal is still pending approval, this step will allow me to confirm for the IRB committee that the department accepts the potential for this proposed study, should it be approved.
Thank you for your review and best regards,
Megan Kral

Appendix C.

IRB Approval Letter

There are 2 documents in this section. The first is a copy of the approval letter (on letterhead) signed by the IRB co-chair at the institution of record for this study. Secondarily, a copy of the Articulation Agreement between GCU and the institution of record for this study, is included. Per GCU's Academic Quality Review (AQR) leadership, a stamped copy (on GCU letterhead) of the IRB Approval Letter and Informed Consent are not required per the use of an Articulation Agreement, deferring the responsibility to the institution of record (University of Maryland Global Campus).



March 25, 2024

Dear Ms. Kral,
Your proposal entitled *Descriptions of Remote Academic Advisor Facilitation of Graduate-Level Learner Perspective Transformations* has been reviewed and this letter grants you permission to conduct the study per the terms of the submitted application.

Sincerely,

Darragh McNally

Darragh McNally, PhD
Co-Chair, Institutional Review Board
University of Maryland Global Campus

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3300 West Camelback Road | Phoenix, Arizona 85017 | 602.639.7500 | Toll Free 800.800.9776 | www.gcu.edu

GCU Institutional Review Board (IRB) Affiliation Agreement

This IRB authorization agreement is suitable for documenting a formal agreement between Institutions for review of the research activities specified below: This agreement is permitted by human research regulations at 45 CFR 46.114 and 21 CFR 56.114.

- **Instructions to Researcher: Please submit this to your affiliate institution with an IRB, request the designated IRB authority to fill in the required information, sign and date.**
- **Instructions to Affiliate Institution with an IRB: Please fill out and return to researcher.**

Name of Researcher's Institution *(Institution/Organization A):*
Grand Canyon University (GCU)
FWA Registration #: 00008664
IRB Registration #: IRB00004878

Name of Affiliate Institution with an IRB (*Institution/Organization B*):
University of Maryland Global Campus
FWA Registration #: 00032817
IRB Registration #: 00013653

Please carefully read these options and choose one after consulting with Institution/Organization B.

XXX☐ Institution B DOES wish to be the IRB of record (please check reason below)

XXX☐ Institution B requires all human research to be conducted under the Institution's FWA.

☐ Institution B requires only federally funded research to be conducted under the Institution's FWA

☐ Institution B DOES NOT wish to be the IRB of record

☐ Institution B does not have an FWA (if applicable)

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GCU Institutional Review Board (IRB) Affiliation Agreement

The Officials signing below agree the designated IRB of Record is responsible for review and continuing oversight of its human subjects research described below: (*check one*)

☐ This agreement applies to all human subjects research covered by Institution B's FWA.

XXXX☐ This agreement is limited to the following specific protocol(s):

Name of Research Project: *Descriptions of Remote Academic Advisor Facilitation of Graduate-Level Learner Perspective Transformations*

Protocol Number: N/A

Name of Principal Investigator: Megan Kral

Sponsor or Funding Agency: N/A

Award Number, if any: N/A

☐ Other (*describe*): Click here to enter text.

The review performed by the designated IRB of Record will meet the human subject protection requirements per OHRP-approved FWA. The designated IRB of Record will follow written procedures for reporting their findings and actions to appropriate officials at the affiliate IRB. Relevant minutes of IRB meetings will be made available to the affiliate IRB upon request. The IRB of Record remains responsible for ensuring compliance with the IRB's determinations and with the Terms of its OHRP-approved FWA. This document must be kept on file by both parties and provided to OHRP upon request.

Melissa A. Singer Pressman

_____ _____ Date: 4.18.2024

Signature of Signatory Official for Institution A:
Full Name: *Melissa Singer Pressman, PhD, MLIS*
Institutional Title: *Director, IRB*

_____Jen Simonds, Ph.D. /s/_____ Date: 4/12/2024

Signature of Signatory Official for Institution B:
Full Name: *Jen Simonds*
Institutional Title: *Co-Chair, IRB / Asst. VP for Academic Integrity & Accountability*

Appendix D.

Informed Consent

The institution of record for this study (not GCU), provided final informed consent approvals for this study. See the articulation agreement in *Appendix Q: IRB Approval Letter*. As such, an additional document with a GCU stamp is not required; per GCU IRB office, including this notice to inform reviewer(s) of this status.

Approved Informed Consent (UMGC-Institution of Record)

I volunteer to participate in a research project conducted by Megan Kral from the University of Maryland Global Campus. I understand that the project is designed to gather information about advising graduate-level learners. I will be one of approximately 20 people being interviewed for this research.

1. My participation in this project is voluntary. I understand that I will not be paid for my participation. I may withdraw and discontinue participation at any time without penalty. If I decline to participate or withdraw from the study, no one on my campus or in my organization will be told.

2. I understand that most interviewees will find the discussion interesting and thought-provoking. If, however, I feel uncomfortable in any way during the interview session, I have the right to decline to answer any question or to end the interview.

3. Participation involves being interviewed by a doctoral student from the Grand Canyon University. The interview will last approximately 45-60 minutes. Notes will be written during the interview. An audio tape of the interview and subsequent dialogue will be made. If I do not want to be taped, I have the right to ask the interviewer to turn off the recorder.

4. I understand that the researcher will not identify me by name in any reports using information obtained from this interview, and that my confidentiality as a participant in this study will remain secure. Subsequent uses of records and data will be subject to standard data use policies which protect the anonymity of individuals and institutions.

5. Other than the interviewer, no other person will be present with me during the interview. This precaution will prevent my individual comments from having any negative repercussions.

6. I understand that this research study has been reviewed and approved by the Institutional Review Board (IRB) for Studies Involving Human Subjects at the University of Maryland Global Campus. For research problems or questions regarding subjects, the Institutional Review Board may be contacted at irb@umgc.edu.

7. I have read and understand the explanation provided to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this study.

8. I have been given a copy of this consent form.

2. First and Last Name

Done

Powered by SurveyMonkey

Appendix E.

Recruitment Materials (Stamped)

This section contains the initial recruitment letter approved for this study. As well, the second requested modification included alterations to the content in this letter. A copy of the modified recruitment letter is also provided for reference; changes made to the letter are highlighted in yellow.

Initial Recruitment Letter

Recruitment Letter

Hello ~

My name is Megan Kral, and I am a doctoral candidate working on my dissertation with Grand Canyon University.

This outreach is to notify you of an academic research project I am working on, to understand how academic advisors describe their experiences interacting with graduate-level learners. This could be something in class, or something impacting them at home or work. Specifically, this study seeks to understand what you feel, think, and experience, as you help graduate learners transform (or change) their perspectives about something related to their academic progress.

Participation in this study may be beneficial to your professional growth and development as a success coach. However, participation is completely volunteer based, so declining to participate will have no impact or consequences. Please also note, the info you give (as a participant) will be treated confidentially and not reported in a way that will identify you directly.

Participants must have advised learners at the graduate-level (graduate degrees and graduate-level certificate programs) for at least 2 years (at this or any institution). If interested, you will be invited to participate in either an interview (via Zoom) or an online questionnaire (via SurveyMonkey).

For any questions or concerns regarding this study or the intended data to be collected, please feel free to contact me directly (see contact details below).

If interested, please complete the Criteria Verification Survey, on this link:
https://www.surveymonkey.com/r/W75FGJT

Thank you and I look forward your consideration for participation in this study.

Best regards,
Megan Kral

Contact phone: [redacted]

Contact Email: [redacted]
UMGC's Institutional Review Board Contact: irb@umgc.edu

IRB APPROVED
IRB NUMBER: IRB-2024-6491
IRB APPROVAL DATE: 05/30/2024

Modified Recruitment Letter

Hello UMGC Colleagues,

I hope this Summer is going well for you so far!

This is a 'last call' outreach to see if you might be interested in responding to an open-ended questionnaire about your experiences supporting our learners; this questionnaire takes generally 20-30 minutes. Or if preferred, you may request to be interviewed instead for this study (takes generally 45-60 minutes).

My name is Megan Kral, and I am a doctoral candidate working on my dissertation with Grand Canyon University.

For my dissertation, I am working on an academic research project to understand how advisors/coaches describe interacting with graduate-level learners. This could be something in class, but may also include impacts from home or work. Specifically, this study seeks to understand what you feel, think, and experience, as you help learners transform (or change) their perspectives about something related to their academic progress.

Participation in this study may be beneficial to your professional growth and development. However, participation is completely volunteer based, so declining to participate will have no impact or consequences. Please also note, the info you give (as a participant) will be treated confidentially and not reported in a way that identifies you directly.

Participants must have advised learners at the graduate-level (in any capacity) for at least 2 years (at this or any institution).

If interested, please see the following link to get started:
https://www.surveymonkey.com/r/NBPC3HX

For any questions or concerns regarding this study or the intended data to be collected, please feel free to contact me directly (see contact details below).

Thank you for considering your participation in this study!

Best regards,
Megan Kral
Contact phone: 480-371-9222
Contact Email: [redacted] or [redacted]
UMGC's Institutional Review Board Contact: irb@umgc.edu

IRB APPROVED
IRB NUMBER: IRB-2024-6491
IRB APPROVAL DATE: 7/10/2024

Appendix F.

Criteria Verification Survey

(Inclusion/Exclusion Criteria)

Via Survey Monkey link:

https://www.surveymonkey.com/r/W75FGJT

To participate in this study, you would need to have a positive (Yes) response to the following Inclusion/Exclusion Criteria (#1-3). Please answer the following questions truthfully, then review the final question (#4) to determine next steps.

1. Have you worked as an academic advisor, supporting graduate-level adult learners for at least 2 years? (Yes / No)
2. Do you primarily support a population of stateside UMGC students? (Yes / No)
3. Do you work remotely (i.e., virtually and/or from a remote location), using either synchronous or asynchronous communications? (Yes / No)
4. If you answered yes to questions #1-3's above, would you be willing to participate in either of the following?
    A. A semi-structured interview
    Expected to take approximately 45–60-minutes; conducted via Zoom; on camera; names changed for anonymity
    B. An open-ended questionnaire
    Expected to take approximately 20-30 minutes; conducted via SurveyMonkey; anonymously reported
    C. Either a semi-structured interview or an open-ended questionnaire

Optional Demographic Questions:

1. Years you have worked as an academic advisor. _____
2. Years employed at UMGC (if multiple roles, please specify). _____

Interested Participants Only

Throughout this study, the researcher will assure the anonymity of all participants through coding your contributions to the data.

Please provide answers to each of the following to coordinate participation:

1. First and Last Name: _____

2. To assure educational rights and privacy, please select an alternative name (i.e. nickname or pseudonym) for use throughout the interview/questionnaire data collection and analysis process.
    1. Participant Alternative Name: _____
3. What is your preferred contact method? Please list your phone number (cell, home, or office) or email (personal, academic, or professional) where you would prefer to be contacted to coordinate data collection and for follow-up contact as needed, related to this study.
    2. Participant Preferred Contact Method: _____
4. What is your secondary contact method if the first is unavailable? Please list your phone number (cell, home, or office) or email (personal, academic, or professional).
    Secondary Contact Method: _____

Appendix G.

Interview Guide

Introduction

Okay, we are now recording.
Thank you for taking the time to participate in this research interview today.
To give you some background of why we are here, my name is Megan Kral and I am a doctoral candidate working on a dissertation for my Ph.D. at Grand Canyon University.
For my dissertation I am looking to better understand how remote academic advisors experience intervening with graduate-level learners, where your goal was to transform that learners' perspectives about something related to their academics. This could be something in class, or something that impacting them at home or work. But I am looking to hear about times when your end your goal was to help a learner transform (or change) their perspectives about something impacting them and their ability to succeed academically.
Does that all make sense to you?

Great, and can you please verbally confirm that you have signed the Informed Consent form.

Thank you, and did you understand all the items in that Informed Consent form?

Okay, good, thank you. Before we move forward, do you have any questions regarding the Informed Consent or your participation in this study?

Great! As you share your thoughts and experiences, I may ask follow-up questions just to confirm my understanding or clarify any details. You are welcome to stop me at any point if you have questions as well. And just a quick reminder that you are not obligated to participate in this study so if you decide you no longer want to participant for any reason please do not hesitate to say so.
As you answer my questions, please remember to change students' names to protect FERPA but any stories or past experiences you are willing to share are welcome.
Okay great, do you have any questions or concerns before we get started?

Background Questions

My first few questions for you are just to get some background information:

1. How often do you typically interact with graduate-level learners?
2. Do you change your strategies when advising graduate-level students vs undergraduate students? If so, what are some of the differences?
3. How much autonomy do you have when making decisions while advising learners?

Research Questions

Thank you – we will now move on to the main research questions.

1. In your experience, how do learners' perspectives (about life, learning, school, etc.) influence their decision-making in school?
    a. What is the student responsible for in this process?
    b. What is your role facilitating this process?
2. What is one scenario where a graduate student may need to transform their perspectives about something to overcome an academic challenge?
    a. What was specific transformation needed?
    b. Why is this transformation important?
3. In what situations might you try to avoid transform a learners' perspectives?
    a. Do you ever revisit this conversation again later with the learner? If so, when and what does that look like?
    b. Do you ever introduce your own perspectives? If so, when and what does that look like?
4. How do you know when a learner's perspectives have been transformed?
    a. What behaviors or data do you look for to decide this?
    b. How do you know this means their perspectives have been transformed?
5. How do you know when a learner is resisting needed transformations?
    a. What behaviors or data tell you this is happening?
    b. What do you do in these situations? How do you react?
6. What is the most challenging part of transforming a learner's perspectives about something?
    a. What type of feedback have you received from learners, after you have helped them transform their perspectives?
    b. If you were guiding a new advisor, what advice would you give them for overcoming challenges as they transform learner perspectives?
7. What skills or knowledge help you best when seeking to transform a learner's perspectives?
    a. Can you think of any advice you have been given or experiences that have helped you to effectively facilitate this transformation process?
8. Would you like to contribute anything further to this discussion related to transforming graduate-level learners' perspectives?

Conclusion

Thank you, that was my last question. I appreciate you sharing your experiences with me today. If you do think of any other questions for me in the future, please do not hesitate to reach back out!

Appendix H.

Questionnaire Guide

Introduction

Hello! Thank you for taking the time to participate in this research questionnaire.
My name is Megan Kral and I am a doctoral candidate working on a dissertation for my Ph.D. at Grand Canyon University. For my dissertation I am looking to better understand how remote academic advisors experience intervening with graduate-level learners, where your goal was to transform that learners' perspectives about something related to their academics. This could be something in class, or something that impacting them at home or work. Either way, I am looking to gain stories from you here, of experiences you have had with learners when you attempted to transform (or change) a learners' perspectives about something impacting them and their academic progress.
You are not obligated to participate in this study; if you would like to withdrawal your consent to participate for any reason, please notify via email to [redacted]
This questionnaire contains three (3) background/demographic questions, followed by five (5) short-answer research questions. It should take approximately 20-30 minutes to complete this questionnaire, though you may take as much time as you need. Your responses do not need to be grammatically correct; please do not worry about spelling, structure, or flow as the only concern is the content and details shared regarding your experiences.
Please provide detailed responses to each research question, including responses to each primary and supporting question. Initial background questions will be used to position the data collected; please provide as much detail as needed to address each question. Answers for the research questions should be at least 200 words in length. In your research question answers, please include rich descriptive detail to explain your thoughts, feelings, any actions taken, data or systems reviewed, etc. Whether successful at transforming the learners' perspectives or not, please include any details you can recall about your experiences attempting to intervene with them.
This study seeks to understand what it is like to identify learners that may need to transform their learning perspectives about something, to have the best chance at succeeding academically. How you experience facilitating these transformations in a learner, is of central importance to this research.

Background Questions

Please provide detailed responses to each research question. Initial background questions will be used to position the data collected; please provide as much detail as needed to address each question.

1. How often do you typically interact with graduate-level learners?
2. Do you change your strategies when advising graduate-level students vs undergraduate students? If so, what are some of the differences?
3. How much autonomy do you have when making decisions while advising learners?

Research Questions

Please provide detailed responses to each research question, including responses to each primary and supporting question. Answers for the research questions should be at least 200 words in length. Be sure to include rich descriptive detail to explain your thoughts, feelings, any actions taken, data or systems reviewed, etc. Whether successful at transforming the learners' perspectives or not, please include any details you can recall about your experiences attempting to intervene with them.

This study seeks to understand what it is like to identify learners that may need to transform their learning perspectives about something, to have the best chance at succeeding academically. How you experience facilitating these transformations in a learner, is of central importance to this research.

1. Describe some general scenarios where you might decide a learner may need to transform their perspectives, to succeed academically. What are you responsible for (as the advisor) in this transformation? What is the student responsible for?
2. Describe a time when your intervened with a graduate-level learner with the goal of helping them transform their perspectives about something. When making this decision, what actions did you perform, behaviors did you observe, or data did you reference?
3. Describe a time when you have decided not to try and transform a learner's perspectives about something? Why did you decide a transformation was not needed?
4. Describe a student that was resistant to your attempts to transform their perspectives about something? How did you face or overcome this challenge? What behaviors and/or data told you they were resistant?
5. Describe the most challenging part of transforming a learner's perspectives. Why is this challenging for you? How do you deal with/manage this challenge? What skills or knowledge have you developed because of this challenge?

Conclusion

Thank you for participating in this questionnaire to share your experiences supporting graduate-level learners. If there is anything else that you would like to discuss regarding this study in the future, please contact me via email at [redacted]

Appendix I.

Interview Details

Participant	Date Interviewed	Duration (min)	Transcript Pages
Sloth	5/31/24	49	13.9
Jaguar	6/3/24	54	17.7
Mule	6/3/24	46	17
Reindeer	6/4/24	49	16.9
Horse	6/5/24	80	25.3
Wallaby	6/17/24	57	19.4
Racoon	6/17/24	75	16.9
Kangaroo	6/18/24	73	15.6
Wolf	6/19/24	45	15.1
Giraffe	6/20/24	77	23.3
Rabbit	6/21/24	62	20.4
Lion	6/24/24	62	18.2
Squirrel	6/24/24	62	19.4
Bear	6/26/24	66	21.9
Tiger	6/26/24	69	18.6
Fox	6/27/24	61	20.4
Quokka	6/28/24	60	17.8
Hippo	7/17/24	70	21.6
AVERAGE	N/A	62	18.9
TOTAL	N/A	1,117	339.4

Appendix J.

Questionnaire Details

Participant	DATE Completed	Duration (Minutes)	Transcript (Pages)
Armadillo	6/12/24	36	2.3
Bat	6/16/24	530	1.7
Elephant	6/26/24	549	1.9
Lynx	6/28/24	16	1.1
Antelope	7/1/24	5	1.1
Cow	7/2/24	51	1.9
Goat	7/2/24	12	1.5
Possum	7/4/24	37	2.2
Deer	7/9/24	75	2.0
Hedgehog	7/9/24	919	2.9
Hyena	7/9/24	65	2.6
Panther	7/9/24	23	2.1
Platypus	7/9/24	70	2.6
Monkey	7/10/24	1398	1.9
Baboon	7/11/24	468	1.7
Gorilla	7/11/24	53	1.6
Koala	7/11/24	126	1.6
Lamb	7/11/24	44	2.1
Mouse	7/11/24	187	1.8
Skunk	7/11/24	205	2.5
Whale	7/11/24	18	1.4
Ostrich	7/17/24	29	1.8
Sheep	7/17/24	48	2.8
Turtle	7/17/24	210	2.0
Chipmunk	7/18/24	88	1.4
Rhino	7/18/24	52	2.3
Walrus	7/18/24	38	1.7
Zebra	7/23/24	33	3.0
Cheetah	7/24/24	42	1.7
AVG (No *)	N/A	187.1	2.0
TOT (No *)	N/A	5427	57.2
AVERAGE	N/A	195.2	1.8
TOTAL	N/A	6863	63.1

Appendix K.

Interview Categories/Themes

Initial Themes	Initial Categories			
1: Naming the Problem	Identifying Potential Pitfalls	Identifying (Current) Barriers & Challenges	Situational Awareness	Problem vs Need vs Desire
2: Data-Responsive	System Access	System Capabilities	Milestones/ Timelines	Change
3: Conversational Acumen	Conversational Acumen	Asking Questions	Collaboration	
4: Tribal Knowledge	Tribal Knowledge	Expectations & Responsibilities	Developing KSA's	Autonomy (Personal vs Policy)
5: Reinforcement	Reinforcement	Learning Activities	Resilience	Regulation
6: Assessment	Time & Money	Assessment	Needs & Wants	Mindsets
7: Discovery	Documentation	Recognizing Motivations	Goals	Competencies
8: Opportunity	Resource Availability	Populations of Learners	Policies & Procedures	
9: Intervention	Identification of Interventions	Implementing Interventions		
10: Relationships	Relationship Management	Humanity		
11: Resource Matching	Policy & Program Dynamics	Resource Connection	Recognizing necessary KSA's	
12: Making a Connection	Strategic Communication	Making a Personal Connection	Managing Expectations	
13: Academic Progress	Happy Path	Price of Entry	Resistances	
14: Coaching Dispositions	Acceptance of Limitations	Respect for Scholarship	Professional Development	Reverence for Academic Achievement
15: Career Matching	Revisit, Reflect, and Reassess	Career Pathing		
16: Enablement	New Habit Formation	Facing Barriers & Challenges	Enabling Future Action	
17: Purposeful Reflection	Predicting Potential Future Outcomes	Maintaining a Clear Perspective	Reflection	

Initial Themes	Initial Categories			
18: Learners "Why"	Vision	Precipitating Events to Start	Finding their "Why"	
19: Advisors Experience & Development	Experience & Practice	Variation if Approaches	Personal & Professional Development	Teaching as Advising
20: Accuracy & Follow-through	Service to Others	Retention	Accuracy & Follow-through	Consistency
21: Advisor Support Systems	Advisors Personal Attributes	Advisement Culture	Teamwork	
22: Learner Readiness	Open & Willing	Leveraging Motivations	Engagement in outcomes	

Appendix L.

Questionnaire Categories/Themes

Initial Themes	Initial Categories			
1. Figuring things out	Asking learners questions	Rationale for asking/not asking	Approaches & Strategies	
2. Conversations Cycles	Maintaining open dialogue	Engaging in conversation	Rationale for conversing	Discussing plans for goals
	Navigating conversation & barriers	Listening	Providing or Collecting Answers	Post conversation
3. Program of Study	Program dynamics	Finding the right program	Making changes to programs	
4. Career Planning	Career-Program Match	Career pathways	Professional goals/vision	Career Planning Resources
5. Completing a Program	Critical points along the journey	Stages of program progression	Schedule of classes	
	Barriers to completion	Completing a Program		
6. Understanding Expectations	What to expect in programs	Maintaining academic progress	Academic Perspectives	
	Expected "costs" of attendance	Institution & Industry Expectations		
7. Value of Experience	Sharing experiences / opinions	Bringing experience to learning	Appreciating the value of new experiences	Limitations & Barriers - from experience(s)
8. Managing Responsibilities	Learner Responsibilities	Advisor Responsibilities	Shared / Division of Responsibilities	
	Time management	Resources to enhance learning	Professor / Department interactions	
9. Finding the reason(s) for action	Wants & Needs	Emotions & Feelings	Understanding learner / learning	
	Rationale for taking actions	Finding "why"	Sharing feedback	
10. Deciding the right path forward	Appropriate variety of resources	Identifying options & outcomes	Identifying the reality of the situation	
	Autonomous decision making	All people are different people	Difficult aspects of engaging with learners	
11. Dealing with challenges	Reflections on ways to deal with future challenges	Leaning on administrative processes	Providing support to the learner	Helping make an impact

Initial Themes	Initial Categories			
12. Identifying Transformations Taking Place	Discovering situational perspectives	Transformations	Openness to transformed perspectives	
	Resistances taking place		Taking progressive steps/Moving forward	
13. Successes & Failures	Drop/Withdrawal from classes/program	Class Progression	Assignments & Grades	Navigating the classroom
	Hinderances to course progress	Failing to meet course expectations	Being proactive towards finding success	

Appendix M.

Final Themes

RQ1: How and When Advisors Transform Learners' Perspectives

A. When: Timing of Transformation

- Critical Points Along the Journey
  Identifying key moments in a learner's academic path where perspective shifts are likely (i.e., during challenges, milestones, or major transitions).
- Strategic Situational Assessment and Awareness:
  Recognizing specific circumstances that prompt reflection and change in a learner's outlook.
- Resistances to Learning and Transformation:
  Identifying and addressing resistances learners may have towards change or new perspectives.

B. How: Dynamics of Transformation

- Co-Created Learning and Advising Roles:
  The readiness of learners to embrace new ideas and experiences.
- Transformative Advisement Approaches:
  Utilizing real-world experiences to challenge and reshape existing beliefs.
- Motivation-Driven Learning Mindsets:
  How an advisor can influence a learner's motivation, which is crucial for perspective change.
- Empowered Self-Transformation:
  Fostering an environment where learners feel empowered to explore new viewpoints and take charge of their learning.
- Emotionally Intelligent Cognitive Transformation:
  Acknowledging the role of emotions in learning, which can affect how perspectives are formed or transformed.

RQ2: Steps Involved in Facilitating Transformations in Learners' Perspectives

A. Enduring Advisement Relationships

- Every Conversation is a Different Conversation:
  Emphasizes advising must be personalized and adaptable, responding to each learner's evolving needs, perspectives, and stage in their educational journey.
- Reflective Inquiry:
  Using open-ended questions to encourage self-reflection and deeper thinking.
- Interpretive Advisement Frameworks:
  Actively listening to learners to understand their current perspectives and challenges.

B. Reflection and Assessment

- Reflective Practice for Continuous Improvement:
  Encouraging learners to reflect on their experiences.
- Barriers to Learner Progression:
  Understanding what hinders learners from achieving their goals.

C. Planning and Strategy Development

- Personalized and Adaptive Goal Alignment:
  Collaboratively setting goals that align with the learner's vision and aspirations.
- Exploring Opportunities for Academic Progress:
  Exploring different pathways and potential outcomes to broaden perspectives.
- Bridging Education and Career Pathways:
  Linking personal development to career aspirations, helping learners see the practical applications of their education.

D. Implementation of Interventions

- Targeted Interventions for Diverse Learners:
  Taking actionable steps to support learners through tailored resources and guidance.
- A Clear Pathway to Progression:
  Establishing clear timelines for achieving goals to provide structure.

E. Continuous Support and Follow-Up

- Learning Management and Progress Tracking:
  Keeping records of discussions to track progress and maintain accountability.
- Effective Classroom Engagement and Self-Management:
  Supporting learners in managing their classroom experiences effectively.
- Trustworthy and Transparent Relationship Management:
  Building a trusting advisor-learner relationship that encourages open dialogue.

F. Transformation and Retention

- Continuous Growth and Reflection:
  Offering constructive feedback that encourages growth and reflection.
- Transformative Retention: Milestones on the Path to Mastery:
  Celebrating small successes to maintain motivation and momentum.

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