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## Pairing the Adult Learner and Boutique Wineries

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### Abstract

This study explored connections between adult learners and their experiences in the context of small boutique wineries operating in the start-up phase of the organizational life cycle. The research objective was to gain insight regarding the pairing of adult learners with the entering of a specialty industry. Fourteen individuals from four wineries were interviewed in the workplace. Six themes emerged from the adult learning in the specific context the boutique wine industry: (1) Developing an Entrepreneurial Sense, (2) Relationships, (3) Challenges, (4) Learning, (5) Joy or Enjoyment, and (6) Reflection.

### Introduction

Entrepreneurial owners and managers enter a market often with little, if any, appropriate education or practical experience. They are looking to grasp a unique opportunity but are frequently caught unprepared for realities of meeting challenges facing small businesses. This study explored connections experienced by owners and managers of small, local boutique wineries operating in the start-up phase of the organizational life cycle. The purpose of the study was to gain insight into the pairing of adult learners with the entering of the boutique wine industry. Small business and entrepreneurial contexts provide a unique lens for exploring adult learning. Wineries in the study were operating in a young, emerging industry in a geographic region. This study offers insights into how adults' learning can be easily paired with entrepreneurship.

Acknowledged as one of the fastest growing segments of the economy in the United States, small businesses have become particularly appealing to indi-

viduals who have become displaced or unemployed during an economic downturn (Lans, Biemans, Versteegen, & Mulder, 2008). Small businesses are recognized as "engines of economic development" (p. 598) because of their rising influence in the world today. A changing economy and appeal of the wine industry has led individuals to open small boutique-style wineries.

During early years of small business formation, also known as a start-up phase, operations can be intense and difficult (Greiner, 1998). Even during ideal times with appropriate resources over half of new organizations fail within four years (Kaplan & Warren, 2007; Scarborough, Wilson, & Zimmerer, 2009). Small business environments have emerged as a critical context where individuals are drawn to an opportunity to experience adult learning. Boutique wineries offered as a ripe context for an in-depth view of learning in a specific context.

This phenomenological, qualitative study explored learning experiences of adults who represented the

owners and managers of several small, local winery businesses. While extensive literature is available about adult learning, descriptive research about personal learning experiences of entrepreneurial individuals in a small business context is lacking (Choy, 2009; Cope, 2005). Exploring adult learners in an environment they constructed and give meaning to contribute to the andragogical literature by providing modern day examples to theories of learning in adulthood. Researchers have advocated for more study in a wider variety of contexts to develop a deeper understanding of the role environment plays in learning (Casey, 2005; Knowles, Holton, & Swanson, 2005; Phelps, Adams, & Bessant, 2007). Discussion has also surfaced among scholars about developing greater insights into practical applications addressing needs of specific industries (Beverland & Lockshin, 2001; Masurel & van Montfort, 2006). Further exploration of these relationships in small business contexts can provide insights into identifying factors, which create an atmosphere where individuals are given more opportunities to learn and therefore positively impact performance of a business.



### **Related Adult Learning Literature**

The field of adult learning or andragogy represents a “set of core adult learning principles that apply to all adult learning situations” (Knowles et al., 2005, p. 2). An increased focus on the adult learner recently has created a corresponding interest in research. According to Sadler-Smith (2006), “learning is a longer term

change in the knowledge possessed by an individual, their type and level of skill, or their assumptions, attitudes and values which may lead to them having increased potential to grow, develop, and perform in more satisfying and effective ways” (p. 4). Transformational learning theorist Mezirow (1994) stated that “learning is defined as the social process of construing and appropriating a new or revised interpretation of the meaning of one’s experience as a guide to action” (p. 222). Both definitions include an emphasis on potential expectations as a result of individual change occurring in the past. A constant evolving environment and needs of the individual learner continually create demand for innovative research and new assumptions to be developed and tested.

Knowles, Holton, and Swanson (2005) advocated a transactional model, *Andragogy in Practice*, as a guide to explain how adult learners adapt their learning to their distinctive environments. The unique characteristics and experiences of each individual influence and determine how learning occurs and what learning will result (Knowles et al., 2005; Kolb, 1984). Their model advanced the idea that an integration of learning and environment provides a direct impact on learning effectiveness and often occurs due to conflicts or problem-centered contexts (Knowles et al., 2005). Small start-up wineries provided contexts to study adult learning in a challenging, uncertain environment adding a unique dimension to the learning process.

### **Transformational Learning Theory**

Mezirow (1978) introduced transformational learning theory as an expansion of adult development and learning theory. The expansion is recognized as an increasingly important element of the adult learning discipline because it offers a specific lens, clarifying how adult learners give meaning to and understand their experiences. In some situations, transformational learning provides a key to developing awareness about how learning occurs in a more profound, meaningful way in response to conflicts and new experiences.

For every individual, previous knowledge and understanding form a “frame of reference—a mind-set or worldview of orienting assumptions and expectations

involving values, beliefs, and concepts” (Dirkx, Mezirow, & Cranton, 2006, p. 124). To understand an individual’s frame of reference, relationships, the role of culture, and societal norms need to be given consideration (Choy, 2009; Mezirow, 2003). Furthermore, transformational learning demonstrates learning that encompasses more than merely developing skills (Choy, 2009). The process is significant, leading to a fresh way of thinking and addressing problems.

Two major factors recognized as crucial to transformational learning include the role of critical reflection and rational discourse (Kitchenham, 2008; Mezirow, 1994, 2003; Taylor, 1997). Reflection allows an individual to develop greater potential to appreciate emerging knowledge and ideas. Reflection also highlights the process of perspective and behavior formation. Active self-questioning plays a key role in helping learners become more aware of their beliefs and assumptions. Rational discourse arises from interactions enabling an individual to assess the validity and value of beliefs of others. It results in enhanced learning while expanding greater self-awareness (Mezirow, 2003). Addressing the need for current research to facilitate and encourage transformational learning in context, Choy (2009) advocated learners use context to establish meaning and shape interpretations, and as a result, the workplace can be explored to develop an understanding of existing norms and assumptions.

### **Entrepreneurship and Entrepreneurial Learning**

Entrepreneurship involves practices associated with the creation and start-up of a new organization, typically with profit motives and usually accompanied by risk and uncertainty (Baum & Locke, 2004; Dyer & Ross, 2008; Kaplan & Warren, 2007; Scarborough et al., 2009). As the field has evolved and segmented, researchers began addressing the need to study *how* entrepreneurs learn, or entrepreneurial learning, which is defined as “learning experienced by entrepreneurs during the creation and development of a small business enterprise” (Cope, 2005, p. 374).

According to Cope (2005), five dimensions are included in the entrepreneurial context: (1) learning about oneself, (2) learning about the business, (3) learn-

ing about the environment and entrepreneurial networks, (4) learning about small business management, and (5) learning about nature and management of relationships (p. 380). Entrepreneurial learning transforms prior experiences into valuable knowledge allowing new information to be integrated into an individual’s existing framework with future behavior changing as a result (Holcomb, Ireland, Holmes, & Hitt, 2009; Politis, 2005; van Gelderen, van der Sluis, & Jansen, 2005). Learning becomes a critical aspect of the entrepreneurial process for “it is through learning that entrepreneurs develop and grow” (Cope, 2005, p. 379). Politis (2005) acknowledged that “entrepreneurial learning is often described as a continuous process that facilitates the development of necessary knowledge for being effective in starting up and managing new ventures” (p. 401).

The preceding theoretical perspectives provided a foundation to gain insight about a context and individual learners that paired well together. The emerging relationships between the perspectives invited further examination.



### **Methodology**

Qualitative, phenomenological methodology provided a framework for viewing the learning process in a natural setting. Through a process of investigating the meaning individuals gave to their lived experience, a construction of realities, perspectives, and accumulated experiences was sought (Bogdan & Biklen, 2003;

Merriam, 2002). During interviews, participants were asked to share and reflect on their most memorable learning events as winery owner managers.

The study included stories of learning experiences from individuals in four small boutique wineries during the start-up phase of the organizational life cycle. Fourteen entrepreneurial owners and managers participated in the semi-structured interviews. The connections and patterns that arose were analyzed and meaning was given to the data collected (Bogdan & Biklen, 2003). Semi-structured interviews along with observations and artifacts were used to gather data which focused on “key patterns of interactions” to explore the world of adult learning and provide a richer, detailed picture of the process (Mezirow, 1978, p. 108).



Workplace observations were conducted allowing for a clearer understanding of the interactions, relationships, and participant perspectives (Maxwell, 2005). Observed behaviors in the winery settings supplemented interview data and permitted the researchers to become more familiar with the owners, managers, and context as well as to gather additional data to form a more complete picture of participant learning. All observations took place in the wineries, tasting rooms, and vineyards. Interactions and relationships between the entrepreneurial owners and customers, employees, and volunteers were observed as well as interactions between the owners and managers.

Purposeful sampling was employed in the choice of sites and participants (Maxwell, 2005). The selection

criteria included a specific industry, age and size of the winery businesses, and geographic location. The wineries were considered very small by the wine industry; they are termed “boutique winery” operations and have few, if any employees. Often the owners served as managers and key decision-makers and accordingly strongly impacted the business performance (Lans et al., 2008). Boutique winery is a term used in the wine industry referring to the level of production generally defined by an annual production of 1,000 cases of wine or less.

Each winery was operating in a start-up phase of the organizational life cycle. The longest period of operation for wineries in the study was approximately 6 years. The wineries were geographically separated from other wine producing areas. The small geographic region produced easier accessibility for data collection as well as a distinct setting and opportunity for studying entrepreneurial learning (Lans et al., 2008).

Fourteen face-to-face interviews were conducted primarily on winery premises or in tasting room facilities. Each interview session lasted approximately 60 to 90 minutes. Emails, phone calls, and face-to-face methods were utilized for follow-up questions. To help ensure greater accuracy and for review and verification purposes, responses were tape-recorded and transcribed verbatim as each interview was completed.

As recommended by Moustakas (1994) for data reduction with phenomenological studies, data from each of the 14 participants were analyzed and organized into a coding scheme from which 6 themes emerged. As learning patterns became apparent, comparisons and differences between contexts and individuals materialized.

## Findings

The findings demonstrate a strong relationship between participant learning experiences and business context. Small boutique wineries operating in the start-up phase provided a challenging, dynamic environment that demonstrated the role of context as a significant effect on all types of learning. The environment offered a lens to view contextual influence as an impetus for learning and change (Cope, 2005; Knowles et al., 2005;

Mezirow, 1991). Participants' learning demonstrated strong connections between the areas of adult, transformational, and entrepreneurial learning.

Identifying themes led to a more clearly defined thread between individual learning, comparable learning experiences, and discovery of differences. The themes evolving from the data analysis included: (1) Developing an Entrepreneurial Sense, (2) Relationships, (3) Challenges, (4) Learning, (5) Joy or Enjoyment, and (6) Reflection.

### **Developing an Entrepreneurial Sense**

Developing an entrepreneurial sense and relationships were identified as having the most significance to the purpose of the study. Participants described their experiences and tasks as "learning" woven into their everyday work environment; they learned what was needed to keep their businesses going while becoming more competent in their roles. Participants' learning skills helped them to adapt and improve their responses to environmental challenges.

Participants had little, if any, previous or related experiences in the wine industry, small business management, or starting a business. They discussed a growing awareness of themselves and how their views evolved as they developed a sense of what had become important in their lives as a consequence of starting their wineries. One of the key elements of entrepreneurial learning includes learning about oneself.

Participants shared stories representative of the strong relationship between learning and core adult learning principles of the Andragogy in Practice model (Knowles et al., 2005). They focused on needing to know as situations arose and on the nature of learning. Prior experiences provided guidance when challenging situations were encountered. Likewise, new information was integrated into existing frameworks often with positive outcomes. Participants developed innovative skills and abilities over time fueling further a motivation to learn.

Challenging entrepreneurial context offered ongoing dilemmas in which learning was used to cultivate and practice fresh approaches to problem solving. The participants' worldviews evolved, incorporating past

beliefs and assumptions into new knowledge exhibiting facets of transformational learning (Mezirow, 1994). They learned from their actions, revising previous assumptions and changing future behavior based on new knowledge.



### **Relationships**

Equally important, relationships grew among owners and managers of the wineries and strengthened over the course of the start-up phase. These relationships were beneficial to participants and wineries representing an enjoyable, unexpected aspect of the management process. Learning about the nature and management of relationships and networks represent two essential components of entrepreneurial learning as advocated by Cope (2005). Participants described relationships as being an important aspect of the business environment encompassing customers, grape growers and suppliers, each other, and others in the wine community. Relationships became a fundamental part of their entrepreneurial networks exemplifying the importance of business connections. Individuals at three wineries set goals of using locally sourced grapes for their wine. Sharing similar aspirations led to a stronger community among the individuals involved. One participant reflected, "Our relationships with the growers that we buy from have become really special. You have to trust your growers, and your growers have to trust you. We know that first hand, being growers ourselves."

Participant descriptions exhibited deep meaning and the benefit relationships were to the winemakers signifying a critical aspect advocated in transformational

learning as well (Mezirow, 2003). Relationships developed as philosophies were shared. Connections were valued with an anticipation they would endure through time. The entrepreneurial component of relationships was seen as a key to survival and, ultimately, an avenue of growth for the wineries.

## **Challenges and Learning**

Numerous connections were found between elements of transformational learning demonstrating critical reflection and rational discourse (Mezirow, 1994, 2003). Participants described challenging situations that occurred in their businesses illustrating these connections. When confronted with challenges and crisis, a need to evaluate previously held assumptions is created. This process involves self-assessment or critical reflection as participants looked within themselves to find answers. Participants also turned to others with whom they had developed relationships for guidance and support. They learned to respond to dilemmas by questioning prior beliefs and developing a broader view of their world when adapting to their environment.

The Andragogy in Practice model refers to an adult's orientation to learning in which learning is problem-centered and contextual in nature (Knowles et al., 2005). Participants welcomed learning and came to use it to improve skills and augment their base of knowledge in response to workplace challenges.

Participants' goals were based on what they wanted to achieve, which directed their actions and future behavior. Two adult learning principles promoted by Knowles, Holton, and Swanson (2005) involve a need to be autonomous and self-directed with a strong motivation to learn. The participants indicated a preference for making their own decisions and elected to spend time on learning key aspects of the winery businesses. They experienced a sense of accomplishment from these activities, and in turn, their confidence increased. Participants were developing a heightened awareness of their own learning preferences.

Learning was crucial, in part, due to the nature of the wine industry involving long periods of time between production and finished product. The winemaking process creates uncertainty, requiring a

significant commitment from the entrepreneurs. These factors necessitated learning about small business management and developing a deeper awareness about oneself (Cope, 2005).

Learning was especially critical for the winemakers responsible for the finished product, the quality of the wine. A participant noted, "I am always learning and investigating what I could do with the wine....I have never hit a point where I thought I have got it down.... so I am always learning." Participants concentrated on activities that would enhance their wines, constantly thinking about improvements. Being involved in the process helped seal their commitment to bring back grape growing and winemaking to the region. A second commitment was to produce premium wines from local grapes.

## **Joy or Enjoyment**

Participants choose to become involved in the wine industry because they sought to spend time pursuing an enjoyable lifestyle. They wanted more from work, and the resulting enjoyment was apparent in stories they told. Participants attributed progress of their small wineries to the learning process in which they experienced pleasure and satisfaction. A sense of joy or enjoyment was acknowledged by participants from performing their day-to-day activities as they talked about having a "passion" for work. Participants received validation about their work through awards won during wine competitions with wine competitions representing quality standards in the industry. Winning awards boosted confidence because it provided a competitive arena where more resources, money, education and training, and state-of-the-art facilities were not considered.

Not only were participants surprised and happy with the quality of their wines, but they also enjoyed the process of making wine as well: setting up the winery and related systems to just spending time in the winery. Their goals reflected a desire to stay in control and be responsible for all aspects of the winemaking process as autonomy represents a major aspect of what made their lives so enjoyable (Knowles et al., 2005). Efforts were realized when drinking their own wines and seeing

others enjoy them. “You could just sit in the winery all day and taste and touch and smell. It was such a pleasure.”



### Reflection

The reflection process helped to solve problems and develop new approaches as participants learned their craft. Reflection provided a vehicle for participants to look back and identify learning and attach meaning to it as advocated by transformational learning theory (Mezirow, 1978, 1991, 1994, 2003); it provided an impetus for change. Reflection also emphasizes the role of prior learning (Knowles et al., 2005).

Participants both reflected and learned from rational discourse with others in the industry. All emerged themes involved reflection, from previous experiences to progression through the start-up phase. Participants described changes in their approach to problem solving due to recognition of a need to adapt to the current environment. As they became more knowledgeable as winemakers, grape growers, and small business managers, they experienced more satisfaction with life and work.

Frequently participants were confronted with a unique or new challenge requiring learning for a successful outcome and developing the ability to move forward. Learning, then, became valuable in at least two ways. First, participants became more receptive and open to learning, and this changed their perspective and future actions. They could see rewards resulting from learning. Second, performance of the winery businesses improved and experienced growth. The true value of learning emerged in this challenging context. Reflecting

on past experience led to strengthening the connection between learning and work with the participants experiencing joy and satisfaction.

### Conclusions and Implications

The purpose of this study was to gain insight into the pairing of adult learners with entering the boutique wine industry. Adult learning is recognized as a complex process strongly influenced by each learner’s unique perspective and background and the context in which learning occurs. Choosing entrepreneurial boutique wineries provided a ripe learning context to study.

Reflection is a critical element in transformational learning theory (Mezirow, 1991, 1994, 2003). Use of reflection has also been advanced as an effective technique to help individuals approach problems and challenges in the workplace (Choy, 2009). It is important for learners to have an awareness of the context in which learning is occurring (Cope, 2005; Minitti & Bygrave, 2001; Young & Sexton, 2003; van Geldern et al., 2005). Due to their backgrounds, the participants frequently were unprepared for many of their new responsibilities. By starting their own wineries, they quickly realized that they had become part of a small, eclectic group of entrepreneurial individuals in a defined geographic area seeking others with like goals and interests in life.

The participants exhibited similar learner characteristics such as a need for autonomy and self-direction, which led them to becoming entrepreneurs. Autonomy and self-direction are elements of core adult learning principles advocated by Knowles, Holton, and Swanson (2005) and a key aspect of the entrepreneurial learning literature. Autonomous, self-directed individuals help stimulate entrepreneurial ventures due to independent actions fostering innovation and creativity. Autonomy is seen as a “driving force” because entrepreneurial individuals desire the ability to make their own decisions, which is advocated as a positive aspect of their work lives (Lumpkin, Cogliser, & Schneider, 2009, p. 47).

The participants relied upon their relationships with each other when encountering problems because their

roles and situations had many similarities. Local winery owners knew they were experiencing similar challenges. They developed and strengthened connections with other entrepreneurial individuals as their small winery businesses were entering the start-up period about the same time in this region. The owners intentionally reached out to each other, wanting to be helpful in any way they could. Michael noted, "Everyone wants everyone else to succeed in business." Relationships offered an additional source of knowledge and assistance creating an atmosphere where encouragement and cooperation were common.

Participants described learning as a part of a reflective, self-examination process involving discourse with others that created a shift in thinking and behavior. According to Mezirow (1991, 1994), a trigger in transformational learning is initiated by a crisis or dilemma in which an individual uses reflection and discourse to help reshape assumptions and beliefs to adapt to the environment and create a new foundation for future action. Currently held assumptions were questioned, which preceded to a change in beliefs and values as the participants reflected. Their learning tended to be autonomous and self-reliant as well as to looking outward toward others as resources when appropriate. The learning experiences represented positive outcomes for individuals and business performance when they effectively dealt with challenges in the work environment and advanced their management and winemaking skills.

Learning led to formation of strong entrepreneurial relationships and helped participants overcome barriers of working with unfamiliar responsibilities to constructively manage and cope with challenges in their environment. They received accolades from recognized professionals in the wine industry and praise from a broadening base of customers. Each winery continues to grow and participants look forward to the future as they pass through the start-up phase. Participants managed challenges and adapted to their environment through learning within themselves and cooperating with others. They enjoyed learning and grew as entrepreneurial owners, favorably affecting progress of the small boutique winery businesses.

Small businesses are one of the fastest growing

segments of the economy and include many individuals becoming more engaged in the small business arena as owners and managers. Managers and owners of small businesses and small wineries specifically, business educators, and human resource professionals are a few of the practitioners that could adopt or adjust practices to improve entrepreneurial performance. As participants in this study were assisted and positively influenced by learning from those who had gone before them, it is now their role to become educators. Likened to a complete pairing, the adult learner and the development of the local wine industry go well together.

Research to date addresses adult learning in a small business context on a limited basis, yet adult learning is becoming an increasingly more important component of the personal and professional lives of individuals adapting to an entrepreneurial environment. "It is virtually impossible to imagine any human behavior that is not heavily mediated by the context in which it occurs. One can easily conclude that generalizations that are intended to be context free will have little that is useful to say about human behavior" (Guba & Lincoln, 1981, p. 62).

Small business organizations are often a culmination of a major life goal for an entrepreneurial individual in addition to the desire for balance in one's life. Consequently, a perfect pairing of the adult learner and the wine industry emerged in this study.

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