

**Revealing what is ‘tacit/rationally-*invisible*/in
the background’: an online coaching pedagogy for
developing improved leadership practice through
‘presencing empathetic responsiveness’**

Volume 2 of 2

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Keith Kinsella

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APPENDICES TO INTRODUCTION

APPENDIX 1

The ‘Paradoxical Possibilities’ of Distance Learning? (coaching as t’ai chi?)

Since the initial study by Ladkin et al carried out in 2005-6 (Ladkin et al, 2008), my own continuing exploration of the influence of coaching within the online provision of the programme, has identified a number of further educational ‘barriers’ which cast doubt on the MA being able to deliver genuine development which can influence back home performance and practice. However, as in the initial study, I have found in my own research that it is possible to approach these barriers in ways which lead instead to ‘paradoxical possibilities’ for learning and practice development. The reference to ‘tai chi’ here points to the practice of ‘pushing hands’ where the strategy is not to apply direct force but through ‘sticking’ practices (Cheng Man-ch’ing, 1993), to use the energy of the opponent to help you achieve your goal – something that will be needed here of I’m to help students sidestep or leapfrog the barriers to development I’m about to discuss. I now look briefly at the six I’ve identified so that you are aware at the outset of the thesis, of the practical local barriers that need to be circumvented if there is to be a genuine possibility of serious influence on the learning, development, and performance of a situated practice like leadership.

- 1. Can ‘distance’ become an advantage?:** as implied by the opening paragraph there is a strand of literature which is sceptical about the potential for on-line technology to equal or surpass the educative outcomes offered by face-to-face teaching and learning relationships (Arbaugh & Stelzer, 2003; Brower, 2003; Easton, 2003) However with appropriate support from the coach it seems as Ladkin et al report, that ‘the web-based delivery of course materials can actually enable participants to experiment with new theoretical ideas almost immediately within their workplaces’. So unexpectedly, what might seem like ‘dated’ propositional knowledge located in a ‘distant’ university can be experienced by students as a ‘close’ stimulus for thinking afresh in a ‘here and now’ workplace – a good example of the ‘close learning’ concept in action i.e. providing potential learning close to the place of performance. What needs to be understood is what it is that provides ‘support’ that is experienced as ‘appropriate’.
- 2. How can ‘packaged’ knowledge provision become a virtue?:** the ‘containing’ function of the course structure is constituted primarily by the regular delivery week in week out of prepared ‘packages’ of theoretical materials on a wide variety of different topics and aspects of leadership, together with exercises and questions asking students to think about and then reflect on in learning logs. Given that all students already have a very full ‘day job’, this unyielding delivery of academic knowledge is and can be experienced as intense and possibly oppressive after a while especially if, as is often the case, the student gets behind on his/her academic work. However again as reported in the Ladkin et al article ‘the routine of receiving weekly “packages” of material to read and respond to served in itself to demonstrate the contingent nature of

‘truth’ within the leadership field and similarly encouraged their critical engagement.’ And further that this process ‘seemed able to combine both rigidity and flexibility in such a way that participants learned how to exercise choice and discernment about how they engaged with course materials. Again we need to understand how this unexpected response was enabled by the conditions created by the programme structure and support from academic and coaching staff.

3. **How to deal with challenge of ‘asynchronicity’?:** in face to face modes of education, the presentation of knowledge is immediate and synchronous, as e.g. the teacher or coach presents a lecture or ideas to a class or small group. So it’s possible for both sender and receiver to observe non-verbal aspects of communication and use these as well as immediate questioning where this is possible, to check meaning. In contrast, on the MA the provision of both the knowledge and the coaching which follows, is provided in an asynchronous and arms-length and virtual manner. As indicated in the extracts provided throughout the thesis, the inanimate unresponsive educational materials are available on a 24/7 basis and the student can access them at any time, whether at work, at home, driving in the car, or sitting in a hotel room during a business trip. Further the mainly written responses from the coach and any subsequent interactions can occur at any time from as little as a few hours to several weeks after the initial learning log has been submitted by the student. But again, these time and location gaps do not seem to cause the communication difficulties one might expect. Instead it seems that when students read the materials and the coach then responds, they/the coach are able to read these textual messages as though they were in some kind of ‘present’ within an ongoing conversation between coach and student. So in this instance *asynchronicity* does not seem to equal dislocation, and we again need to understand how this might be part of deliberate strategy rather than just good luck.
4. **How to level the knowledge hierarchy?:** in a similar way, it seems that the usual asymmetric *power relations* that exist between university and student can also be reduced. While there is still the all powerful presence of expert knowledge issuing from the university in the form of key academic articles and professorial comments, it seems the potentially oppressive effects can be reduced in the way the coach forms an educational relationship with students in regard to this propositional form of knowledge. If this works, it seems the apparent heavy hand of a distantly located expertise can be experienced by students as being offered on a more level playing field, and more as challenges to conventional wisdom and ‘common sense’ rather than words from on high. We need to understand how it is that this more level field can be created so that students feel they also have their own tacit expertise to consider, apply, and re-value.
5. **How to close transfer gap between cognition and performance?:** the knowledge base that constitutes the MA programme can be described as being largely propositional in nature and delivered in an asynchronous and virtual mode. So one would normally expect that the learning and knowing achieved by students would be largely of a cognitive nature. And this would be reinforced by the university’s focus on the reproduction of such knowledge in marked essays and the summative approach to grading. But what is clear from the original study and my own inquiries as reported in this thesis, is that the learning and

knowing can often be of a more complex and multi-level nature, leading further to the development of new ontological skills associated with new leadership practices. So in this instance, it seems that largely *cognitive* inputs delivered in the usual academic environment, can when supported by an asynchronous and virtual kind of coaching dialectic, lead to improvements in *performance* and *practice*. What is it that might enable this kind of paradoxical outcome to become a regular achievement on this programme?

- 6. How to reduce discontinuity between theory and practice?:** as in much higher education, the domains of theory and practice on the MA are treated as discrete zones: theoretical considerations dominate in the university, and within their organisations, the students as practitioners of leadership, are dominated by matters of immediate practicality. There seem to be few formal links and little interflow between these two zones. The programme design and role of the coaches is to seek connections between these two, through encouraging students to apply theory to practice and, in their dissertations at least, to develop some theory-from-practice within the students' organisations. And both of these – particularly the former - do seem to occur to some extent, varying with the students' and coaches' ambitions. The question is what might these ambitions and the supporting behaviours be, that enable such 'bridging' work to occur?

These six areas are often seen to be, and in practice can be, major barriers to the kind of educational influence that might be associated with the development of situated practices. From my brief review here it can be seen that for a variety of reasons, students on this MA together with the support of their coaches seem to have been able to surmount some or all of these obstacles with varying degrees of success. And from my own experiences, it seems that it is possible to find ways of exploiting to the student's advantage the 'fuzziness' associated with each of these apparently concrete barriers, both individually and as a set of potential development 'amplifiers', by the kind of educational relationship, coaching processes, and the educational social formation that can be stimulated and nurtured within the formal boundaries of the MA programme. I come back to these so-called 'barriers' to development in the final chapter

APPENDICES TO CHAPTER 1

APPENDIX 1: Nanticoke Generating Station, Ontario Hydro, Canada

EXTRACT - Report on the Planning and Control System, Nanticoke GS, Sept 1970, pp 10-11

The last work study project I did at Nanticoke before returning to the UK was of a completely different order to what I'd been doing in the previous two years. From the study of work processes I was now pre-occupied with a major re-structuring of the planning and control system for the whole project, and the associated political and cultural aspects that were energising its operation. Here is a brief excerpt from the extensive report I created to summarise the findings of the lengthy study.

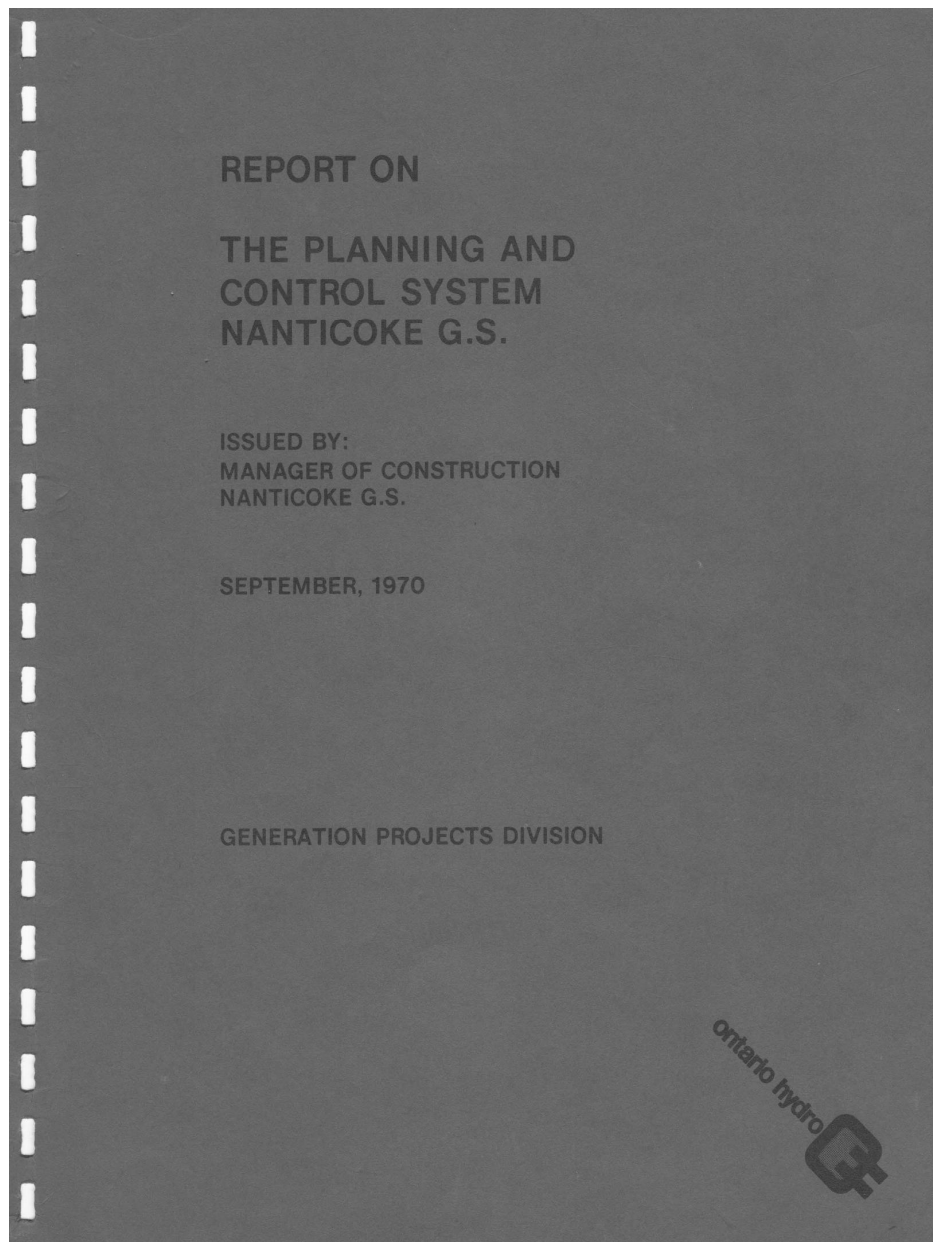


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Costing: Conflict over methods of setting C.C.E's and job cost targets - little commitment shown to latter; with Constr. Eng. group refraining from comment, the cost meetings tended to be a mere reading through of the cost report - little reaction to variances; variances often blamed upon the formwork or pour method decided upon by Constr. Eng.'s group; superintendents accused of sitting on the fence.

Methods: Resistance to use of new type of formwork and some designed concrete pour methods; complaints by superintendents over engineer/gen. foreman discussion - required to follow formal lines of communication.

Use was made of power, both formal and informal, to drive conflict underground and keep working relations as smooth as possible. Most of the behaviour tended to be politically oriented with much use being made of bargaining procedures.

The lack of trust between construction engineering and the superintendents made team work extremely difficult, as there was a tendency to view situations in the light of the "Win-Lose" complex. The defensiveness of most of the parties involved resulted in fairly rigid postures being adopted allowing very little problem solving behaviour.

In retrospect there appear to be 3 main aspects of the problem:

- i) Dissatisfaction with the planning and costing procedures: the existing procedures appeared to be unsatisfactory to all three groups of Res. Engineering, Construction Engineering, and the Superintendents, but for different reasons.
 - a) Constr. Engineering felt that no overall policy had been set up by senior management to guide the control of the job; they were getting little co-operation from the other groups; they appeared to have a lot of responsibility on their shoulders but little tangible control over events; no attempts were being made to bring the scheduling and cost control of the project closer together.
 - b) Res. Engineering felt they were being excluded from taking part in the planning and decision making process; they also felt that certain of their duties were being taken over by Constr. Engineering.
 - c) The Superintendents also felt that they were being excluded from the planning process, and that they were being told what to do and held accountable by the Constr. Eng. section. These feelings also applied to cost control where they felt they were being subjected to a cross examination by Const. Engineering on costs against job targets they had not had much say in setting, and a schedule they had not really helped develop.
- ii) Inter-personal conflict: the problems with the procedures resulted in a hardening of individual attitudes, and a number of personal antagonisms were established.
- iii) Inter-group conflict: personal antagonisms which existed between people in different groups tended to divide the participants into two camps, Constr. Engineering and the other two. However, most of this conflict was probably due to the disparate perceptions of role held by the three groups, and the apparent illegitimate power differences.

Dept. head, the on-going planning & costing discussions within his group were re-oriented to take a look at the role of the P. and C. Dept.

The initial terms of reference were to outline the role of the dept. in the planning & controlling of the project, determine the information requirements of the various levels of management, and establish the working relationships between the four sections in the dept. After a few discussions, however, the analysis was confined to the role definition problem within the context of the existing situation. No attempt was made to take a fresh look at what planning & control should be, the dept's. resulting role, at this stage.

During the months of July and August a series of discussions were held during working hours. The framework for analysis used was that proposed by R.N. Anthony for planning and control systems. As it became evident from this analysis that the solutions to various problems would be affected by the management philosophy being used on the project, reference was made to a number of texts, notably those of Douglas McGregor. Much discussion centred on the problem of commitment to plans, budgets, etc. & how the different styles of leadership affected this. A brief memorandum summarizing the thinking of the group was submitted to the manager towards the end of July for comment.

In the early part of September, the group met with the manager to outline some of the problem areas the analysis had brought out, and some of the philosophy behind the proposed role of the dept. As the P. and C. Eng. was on vacation at this time, the manager decided to await his return before setting priorities for further work. Although no further formal work did result from this submission, a good deal of improvement has been effected in some of the problem areas presented to the manager as a result of work done elsewhere, notably the Civil Information and Planning & Control studies.

Few tangible results came out of this study of role definition. However, two ideas which came out of this work did have important effects on later design work on the P. and C. system. These 2 main contributions were:

1) R. N Anthony's concept of 3 levels of planning and control existing in an organization. This idea helped clarify thinking & had an obvious influence on the new P. and C. system.

2) D. McGregor's concepts of Theory X and Theory Y behaviour. Exposure to the ideas of Theory Y, particularly from the point of view of commitment, has had a strong influence on the underlying philosophy of the new P. and C. system.

3.6 The Orangeville Seminar

During June & July, 1969, action was being taken on another front as a result of the initial concrete study. In an independent diagnosis of the situation, an analyst from the Professional and Manpower Development Dept. had encountered a series of problems very similar to those identified in the previous work study.

On the basis of the findings of these 2 studies, the Manager decided to attempt to resolve conflicts between the 3 depts. through use of management development techniques. Although he felt his management team were performing quite satisfactorily, he wished to increase the level of co-operation and the degree of job satisfaction enjoyed by individuals in each of the depts.

After consultation with the Man. Development Dept., it was decided to hold a one day T-group seminar at the Orangeville Training Centre. This seminar was held on Aug. 6th with members from each dept. & three trainers in attendance. The Manager attended the initial & final sessions only, leaving the 3 groups to themselves for the remaining time.

Unfortunately, the one day did not allow the planned strategy to be carried out in full, with the result that the session succeeded in reaching tentative conclusions on inter group problems only, with no time for working on solutions. However, the session did allow for a reasonably frank exchange of views & this had the effect of clearing the air somewhat & laying the basis for further work.

The results of the seminar, as expressed in reports by each dept. head to the manager were:

By Civil Engineer:

- i) P. and C. Dept. regarded as a closed shop - Civil Eng. group can exert no influence on planning.
- ii) Not enough sharing of information.
- iii) Need for more advanced consultation between groups in establishing method & plans.
- iv) Duplication of effort by Civil Eng. & P. and C. Dept. as far as receipt of Head Office information is concerned.

By Gen. Superintendent:

- i) Responsibility for expediting of eng. dwgs. and other H.O. information to be cleared up.
- ii) An agreed definition of Line and Staff roles and authority is required.
- iii) A definition of the word "Control" in the P. and C. Department's title is required

By P. and C. Eng.:

- i) The attitude towards and use of words such as "practical", "experience", etc. be more enlightened.
- ii) and iii) as for ii) and iii) of General Superintendents.

Comments made by the trainers were as follows:

- 1) There were 3 distinct groups with the P. and C. group being the "out" group. There was thus a problem of integration. It wasn't clear whether the groups wanted to take the responsibility of being integrated.
- ii) The problems were not purely those of "personalities." There were obviously also historical & situational determinants of the problems. The basic problem appeared to be that of "influence processes, a usual problem in Line/staff relationships.

In general the trainers felt that to achieve any sort of long-lasting solution to the conflict between groups, it was essential that a process for the airing of differences & group problem -solving be developed, with a minimum of referrals being made to higher authority for arbitration.

All these comments were submitted to the manager in writing shortly after the seminar. Due to the advent of vacations for several key members of the groups, it was decided to let the matter rest until October. Although some of the issues raised at this session were again reviewed in later work viz. Civil Information Study, no further development meetings of this nature have been held to discuss some of the more fundamental issues raised at the initial session. However, it appears that the co-ordinating engineer system established in May, 1970 may possibly have set up the operational level problem solving process (referred to in the trainers' comments in the previous paragraph) in which most conflicts are aired & resolved at the lower levels of the organization.

3.7 The Ongoing Planning & Costing Discussion - The Start of Changes to the P. and C. System

During the remainder of August, September and October the in-group planning & costing discussions continued quite strongly. Two of the basic ideas which form part of the new P. and C. system were developed & implemented.

The first of these was the Project Status Board now situated in the main conference room. The group decided there was a definite need for a display of easily accessible up-to-date, overall project status information, especially for senior management who were not close to the day-to-day work. After consultation with the Manager in September, the board was designed, installed, and made operational by the end of November, 1969.

APPENDIX 2: Reid and Timpson Associates/Grubb Institute, 1989

Article published in Exeter CLS Leadership Southwest Newsletter, Spring 2005

The Best Advice I Ever Had....

It was 1979 and I was an enthusiastic management consultant several years into a new career and engaging in exciting new change programmes with large organisations like Scottish and Newcastle Breweries, the National Coal Board, and so on. Clients were seeming to attribute to me enormous wisdom and power to solve their problems...though I'd never worked in their industries or done their jobs!

I had found this puzzling and frightening and after a couple of years of trying to stay one week ahead of the game (I had done an MBA!), had gone to The Grubb Institute to seek their advice on how I might better live up to these inflated expectations. I worked with one of their senior consultants, the late Barry Palmer, and contracted to do over a period of some six or so sessions, something they called an 'organisational role analysis'. The idea was that while I tried to understand afresh the difficulties I was having in contributing to and fitting in to my own small but fast developing consultancy, this would in the process introduce me to new ways of understanding organisation behaviour.

What a rocky journey this turned out to be! After each session I found I'd had to let go of long held beliefs, perspectives, and techniques as I discovered how arbitrary, personalised, and frail they seemed to be. The scales were falling from my eyes and the very things which I'd been using to guide my contribution to these large change programmes and that people were finding so 'insightful', 'interesting', and 'creative', were now starting to look rather simplistic, narrow, and decidedly biased. Barry who was a delightful and very wise man, always worked very gently and cautiously - but there was no mistaking the fact that the 'know-how edifice' I was constructing my consulting career on, needed at the very least a very thorough spring cleaning!

I was beginning to feel I had nothing much to offer and was in the wrong profession. Every step I took down this new path of understanding, the less I felt knew, the more confused I was getting, and the less confidence I had in my ability to do the job. And it was towards the end of this series of sessions while I was in this slough of despond that Barry sent me an encouraging little note attaching the following poem by Robert Graves:

IN BROKEN IMAGES by Robert Graves

*He is quick thinking in clear images;
I am slow, thinking in broken images.*

*He becomes dull, trusting his clear images;
I become sharp, mistrusting my broken images.*

*Trusting his images, he assumes their relevance;
Mistrusting my images, I question their relevance.*

*Assuming their relevance, he assumes the fact;
Questioning their relevance, I question the fact.*

*When the fact fails him, he questions his senses;
When the facts fail me, I approve my senses.*

*He continues quick and dull in his clear images;
I continue slow and sharp in my broken images.*

*He in a new confusion of his understanding;
I in a new understanding of my confusion.*

This seemed to accurately capture and positively connote the very state I felt I was in - 'so it was OK to feel like this and a necessary step in learning and developing'! At the time I remember thinking that this was a 'neat' intervention, but as I wasn't much into poems, didn't pay it too much attention. However a few months later I found myself enrolling on a Tavistock Working Conference (my consulting colleagues thought I must be having some kind of a breakdown to go on something as weird as this!) to be followed six months later with a move to work full time at The Grubb Institute for a year or so. And as they say, the rest is history...in the sense that I've yet to get off the learning escalator that this represented - after all what else would explain the fact that I'm still working on a PhD at the age of 63!

But I still have the little bit of paper that Barry sent me all those years ago, with the poem attached with strips of now yellowed sticky tape...and as I re-read it, I realise that it was, if not the best, certainly a very influential piece of advice. Thank you Barry, for helping me grapple so productively with my continuing uncertainties and confusions!

APPENDIX 3: New Hampshire Social Construction Conference

EXTRACT - Note on New Hampshire International Social Construction Conference, June 1993

(regarding validity)... Patti Lather suggested that validity is a limit question of research methodology and is less a matter of looking harder or more closely, but of seeing multiple frames which are able to co-exist, while at the same time appearing to be mutually incompatible... She offered some... original alternatives...:

- Validity of transgression: identifies what's not being talked about-deliberately moves into these
- Ironic validity: simulacra...not the thing itself nor a representation
- Neopragmatic validity: refusing closure, foregrounding multiplicity of language games
- Rhizomatic validity: the no longer and the not yet... tentativeness and partiality
- Voluptuous validity: engagement and self-reflexivity; acting as though I have and acting against

(regarding morality)... Gergen suggested that social constructionism did not of itself say anything about morality: "it has no social programme and no pressure towards action...". He also went on to say he was suspicious of moral systems as they often contain the preferences of one group over another... He also proposed that social constructionism may have an implicit morality; for example, by presenting new spaces and new alternatives. Cronen responded that whether or not social construction serves to empower people is an aspect of the moral domain; whereas McCloskey said that the fight about morality can only be carried out at the barricades. According to the modernist he feels that morality is a matter of ultimate faith; maybe for the social constructionist it is more appropriate to talk in terms of a 'procedural' morality than an end state morality. There was no real debate or resolution of these issues...and no real reply to the dilemma of working in a totally positivist legal system. As Tyler commented: "one learns to do morality by doing morality, not by theorising about it".

My own thinking leans towards McCloskey's view where morality is something one questions in the way one is in dialogue with one's client rather than being primarily concerned about the endpoint - in that if the process is right, the outcome will look after itself... Some of the ways in which I can be moral in a more 'procedural' sense include:

- celebrating the other (Sampson)
- accepting that the client knows his/her/her language/history/culture far better than I do.
- keeping the client contexts and multiple voices firmly in mind, and encouraging him to look at the effects within his wider context
- not seeking to impose my interpretation or to think for the client.
- accepting that the client's goals may be different from mine, although still feeling free to challenge him/her...

(regarding therapy)... I have noticed that the people I work with are often anxious about changing and being different. They would like to make imperceptible changes so that people do not remark on the change -- although perhaps afraid of being teased or not being able to sustain the change. I emphasise that this is not so much a matter of them changing as helping them to increase their repertoire choices so that they can choose to respond in more skilful ways. They are also often anxious about not being authentic to themselves; hence the need to work at the level of values and identity rather than just skills (Dilts' logical levels in NLP)...

(regarding facilitation)... ...as a result of the conference, I noticed that my desire to please and help clients may at times be so strong that I seek to take responsibility for the result rather than getting them to live with uncertainty. For example, when they say that they do not know what they would like to get from a session, I generally prompt them with a number of possibilities rather than reflecting back that it is interesting that they have this opportunity. And that they have not decided how to use it. Similarly, if they have an area where they wish to develop their confidence, they are often not very forthcoming with ideas, and I find I tend to guide their thinking in quite an explicit although not direct way; their expectations seems to be that I will give them suggestions even though I have explained I believe they are best able to generate their own solutions... On balance, I feel there is a place for me to include my ideas, but I need to spend longer encouraging them to be more self-reliant and do their own thinking...

(regarding analysis)... points that came across as important to me are that I recognise the value rather than the nuisance or frustration of counter interpretations. I believe my early assumptions had been that there might be a neat and tidy solution or integration of ideas through some key insight linking a number approaches. I now see the likelihood of viewing the situations or issues through a web of greater complexity, and dimensions affording more interpretations than each approach might have generated alone... **There is an issue of what I'd choose to foreground and what I choose to background and the difference this makes to the interpretation.** With alternative stories to look at, there is scope for me to question which ones are more interesting and why I and/or the client choose one's story over another; and what interpretation of the story is most beneficial at this point. This is where the videotaping of sessions should prove useful in capturing the visual and audible literary data and the emotional mood as well as the strictly verbal.'

APPENDIX 4: Campbell et al KARNAC book with reactions from Ray Holland, 1994

APPENDIX 4 a): EXTRACT – Campbell. D. Coldicott, T. and Kinsella, K. 1994. *Systemic Work with Organisations*. London: KARNAC BOOKS, pp 55-57

From these 10 reframes (which are certainly not in any sense "commandments") we can draw certain conclusions about the criteria that systemic consultation in large organisations needs to address, if it is to be both acceptable and effective. Our first appreciation of this new "ology" is summarised below as we begin shifting from 'expertise to co-creation':

1. **Universal to local:** policies and programs become meaningful when opportunity is created for interaction between corporate intent and local practice law
2. **Observed to observing systems:** productiveness and flexibility of systems are enhanced when change agents connect their own previous and anticipated actions to the problems of change and "resistance"
3. **Part to whole:** in clear gain a broad representation of a system in policy formulation, leads to more radical change and high commitment levels from system members
4. **Debate to dialogue:** letting go of habitual debating patterns for a more relativist position expressed through dialogical enquiry, brings forth greater awareness of other options for change and other explanations that dissolve problems
5. **Detailed to dynamic complexity:** change leadership becomes more effective when it switches from a focus on the detailing of processes to managing meaning using feedback arising from the dynamics of the change process
6. **Quantification to appreciation:** the control of complex social organisations is enhanced when the effect on individual and organisational behaviour of an emphasis on quantitative measurement is understood, and there is a greater appreciation of the central but essentially unmeasurable contribution of many of our mental constructions to what we mean by performance
7. **Instructive to interactive:** training investment yields greater payback when you learning is distilled from experience and the results integrated with daily practice through trial application and adaptation to feedback
8. **Instruments to processes of management:** constructs become more useful when seen as continually evolving from a dialogue across the system about means for improving understanding and performance
9. **Literacy to orality:** the complexity of the impact of local situations on change prescriptions is best handled in face-to-face communication reflecting the context think strengths of the oral tradition
10. **Espousal to enactment:** complex changes more surely implemented one espousal of new ideas is followed by the enactment of new behaviours within the leadership in the relationship between the leadership and the rest of staff and in the cultural context in which they all operate

From these experiences we have evolved a hybrid consulting style in our work with large organisations to deal with the differences being using these ideas with small groups and within organisations.

APPENDIX 4 b): EXTRACT - Ray Holland's letter, 30 September, 1994

I had just registered for a PhD at Kings College London where I was working at the time (running a small consultancy practice), and Ray Holland a senior psychology oriented academic on the staff had agreed to supervise me. As part of my initial writing for him I had sent him an early draft of the above chapter – and this was his reaction at the time:

‘As soon as I started work on your latest writing I knew it was just what I have been waiting/hoping for on the basis of your earlier writing and our conversations. It is excellent! I can see immediately how you have ordered some of the most significant achievements of the systemic-constructionist bodies of knowledge into a usable framework... What encourages me in your work is that I can immediately recognize many identical or parallel formulations to those that I have arrived at by a different route, although some sources are shared...It really is a splendid contribution to a new way of thinking and working many of us are struggling to articulate.’

APPENDIX 5: Bath CARPP: Note - A 'systems man', 22 February, 02

EXTRACT - The growing up of a 'systems' man: steps to an ecology of ideas

My engineering and work study training during the 60's and early 70's had led me to be interested in systems and how they worked – mainly as self contained 'closed' systems although I didn't use those words at the time. I also regarded these systems as good representations of what actually was there, not really as just models of some of the most important and/or well understood variables. Using current language I guess I was using a positivist frame, and although they might not have been perfect they contained all the important information. So I was certainly a 'systems' man in those days.

Many years later, despite journeys into the Tavistock tradition of group dynamics and the more cognitive approach of NLP, I was still pretty much engaged with this idea of systems and was finding this view a very useful approach in all kinds of situations: something goes in, and it gets transformed by a socio-technical system of some kind to produce an output. Using the socio-technical approach and job design principles it's possible to study such a system as an outsider, identify so-called 'variations' from perfect performance, and with the help of the staff involved, design changes that give more control over performance thus leading to higher levels of motivation. So by now I was even more of a systems man but by this time I was much more aware of the 'human variable' and the benefits of involvement – so I was now a 'sophisticated' systems man!

And then came a couple of learning experiences in the early 90's that completely shifted this 'paradigm' if you like, and caused me to travel another much less certain path which I'm still struggling hopefully along, and still a 'systems' man but of another order. What happened was this. While working at the Grubb Institute, I'd heard about the Milan Systemic Family Therapy approach and got intrigued with the mysterious way they seemed to be working. Always being game to learn new approaches which I could adopt and adapt, almost a decade later I went along to a two day family therapy workshop being run by Cechin and Boscolo, two of the founders.

Virtually the first thing they did after the introduction was to set up a family simulation where some delegates would enact a family situation, another group would act as the therapists, another as a supervising group 'behind a one way mirror', and the rest of us as small groups of observers. The family and therapy group were given some initial instructions and then off we went! The therapist group interviewed the family who seemed to invent or create their reality as the conversation went along. This was amazing enough as it felt very real very quickly. And then after a while Cechin asked all the groups to do some reflection and then give some feedback as to what we saw was going on. He first asked the family how they were feeling, and then backed off one step to ask the therapists a similar question. He then went on to the supervising group and eventually round several of the observing groups. What I found amazing were the considerable differences in what was being seen/reported, despite the fact that we had all witnessed the identical event – or so I thought! It seemed that the 'position' you were in had a considerable influence on what you attended to and what you saw as 'the truth': the family saw the individuals in the 'family', the therapists saw the relationships in family group, the supervisors saw the family – therapist 'system', and we outsiders seemed to see different versions of the three element system in front of us! And further what was said by one group to another was more often than not, understood in contrary ways; in other words, the meaning seemed to lie more in the eyes of the beholder than the intention of the message giver, and this meaning varied considerably across the

different perceiver positions. What now of the expert observer seeing what was 'really' going on in 'the' system.....this no longer seemed such a defensible position.

Further the comments and facilitation by Cechin were mostly playful and irreverent - as though what we were doing was a kind of a game, and we could allow ourselves to improvise and play about with the realities we were showing/observing. He seemed to be modelling a kind of lightness where positions could be taken with a kind of temporary conviction - and then dropped without too much sense of loss to explore another possibility. It was as though what we were seeing was created/not 'real', that other constructions might be more useful, and that it was in our interest to find such constructions e.g. frame problems in ways that were solvable.

A few weeks later I went to a one day 'taster' event to do with exploring 'systemic thinking' organised by David Campbell, one of the Milan School's strongest UK supporters, based at the Tavistock. Very early on David drew two simple diagrams on the flipchart. One said 'I see the problem'. The other said 'how I see the problem is part of the problem!' Now there was no escape: the safe position of expert external observer was no longer one I could adopt with any sense of security. I was still a 'systems' man (or rather a 'systemic' man!) but now I was part of the system, influencing it and being influenced by it, unable to single-handedly determine what was really going on in the 'system' before me, unable to know how my contributions might be understood, aware that what I saw and understood was conditioned by my own lenses, and subject to the principle of 'emergence'... although again that was not a word I was familiar with at that time. And so started a fascinating journey into the domain of second order cybernetics, social construction, the closed perceptual worlds of Maturana and Varela, power-knowledge, reflective practice etc etc!

APPENDIX 6: Bath CARPP: Note - Who is the 'I' doing the researching, April, 02

EXTRACT - Who is the 'I' doing the researching?

Following some ideas I got during our last supervision group discussion, I've thought of a potential new perspective to use in thinking about the 'I' doing the researching. And that is to frame my considerable and lengthy efforts to develop my own practices of consulting/facilitation etc over the past 35 years, my constant search for new knowledge and more effective methods etc, as *a search for roots in the future*. That is, *to look at my experience, my tacit knowledge, and intentionality as an implicit search for roots for an emerging identity - not in my past but in places where I've not yet been*. There are several aspects to the emergence of this potential new frame.

Firstly, at the last session, sparked off by Jacky's reflections on her work on Jewish history, I mentioned briefly my own sense of fragmentation, alienation and of a lack of rootedness - in the context of an upbringing in a broken home and apartheid-riven South Africa, and subsequent re-location in England some 30 years ago. These feelings had been re-awakened when I took part in a 3 week Worldwork conference in Bombay in 1997, and though at the time I'd resolved to do some work to better integrate and ground myself, I wasn't aware I'd done much since then. Following our discussion, I thought now would be a good time to start.

A second stimulus came a couple of weeks ago on my way to a holiday in Thailand, when I started reading V S Naipaul's early work - *A House for Mr Biswas*. I was immediately struck by the view taken of Naipaul's motivation offered in the introduction written by Ian Buruma. He felt that Naipaul had one story which he told several times in different books. "as if he were holding up the same events to different shades of light" for further examination. These are stories about men who want to escape fate and seek freedom from its magic, rituals, and myths; about men who fear extinction and who want to make good and so 'leave a trace'. Like them, Naipaul too seeks freedom but through the vocation of writing: his stories are his way of "trying to find order in the world", of "looking for the centre", and making sense of his life. And this vocation exposes him to the "tension between that dark world of wholeness and myth - handed down to us by ancestors, and the new one of self-awareness and change - which we make up ourselves". So he keeps travelling to stir his memories, to find new stories, and to re-evaluate his own. This view of Naipaul's search resonated with me and got me thinking about what my 'vocation' might be in this sense, what my 'travelling' (in intellectual terms) might be, and why so?

And then a week or so after I got back to England, as I was driving back down the M4 to Bristol, and mulling things over in my mind, this set of words came into my mind - 'a search for roots in the future' - as a way of understanding what I've been doing all these years. This seemed a little strange! However, over the years one of my central yearnings has been to find (or now I'd rather say, shape) a more integrated, authentic, connected, and rooted me. And so perhaps this unceasing search of mine throughout my adult career since leaving South Africa, for new ideas over a very wide and diverse range of topics/themes could be seen in this light - not just a search for better methods of consulting/coaching etc as I'd thought, but more importantly, a search for roots, *for a 'me' that would feel grounded, confident, and 'at home'*.

But if this was so, what is it that has been driving this search, stimulating me to follow up certain themes and ignore others, and to strive to develop practitioner level abilities in some, but just background knowledge in others. And it's here that my initial reading of Polanyi came to the foreground to suggest that it's my *tacit knowledge* that has been doing the guiding and driving, often without me knowing explicitly why I was pursuing something or other. It's been as though my tacit knowledge has known I was going to find something useful at some stage, or needed to experience something, and nudged me into it - even though in some cases, I have had to wait years before it became evident to me! A good example is provided by Arnie Mindell's 'dreambody' approach to therapy. In 1987 I came across a couple of his books in a bookshop and something about them must have attracted me. I bought them but then didn't touch them for almost 10 years. It was only in 1996 following the death of my wife, and at the urging of a friend, I decided to see what it was all about - and after a first experience in Oxford in a 'dreambody' workshop, was then 'hooked' for a good few years, studying intensively here, in India (see reference to Worldwork seminar above), and in the USA. (and there are plenty of other examples of this ilk).

And another question then arises. How come after these few years, as with other ideas and approaches I'd got absorbed in, I just stopped taking part in events and let this 'body of knowledge' slip into the background of my attention? Stopping short of becoming a full practitioner or devotee, but continuing to hold on and to try and connect this with other ideas I've explored or am exploring? It's as if I needed to know 'enough' about certain territories - and this has often meant working towards practitioner level capability - to be able to link with other ideas in a knowledgeable and creative way. I could of course just be a dilettante, but if so, why do I hang on, and on?

In a way it has felt as if I've been spiralling ever outwards in my search, with the hope that I would eventually find links and resonances between all the different pathways I'm following.....and in time it would all come together in a great Polanyian gestalt or 'integrative act' - and not only would I understand my work environment and challenges better, I'd feel a more whole person. So rather than looking for my roots in the past e.g. by going back to South Africa and trying to make new connections with my fragmented and estranged experiences there, perhaps instead, I've been searching 'out there' for ideas/practices which for some reason seem/seemed important to me, and which possibly offer handholds/points of purchase which I could use to integrate all the different parts of me that seem to have been searching for something for an awful long time!

But then just what is this body of 'tacit knowledge' that seems to be doing all the driving and deciding? How do I start investigating this systematically? This then links with our last supervision discussion where I'd got a strong image as Jack was talking about the considerable body of tacit knowledge we each have developed, and the research challenge of drawing this out, testing it, and communicating it to others. I had this image of a range of different pathways or probes penetrating this 'body', that elicited different aspects of the implicit living theories that I was/am working on, and that are providing the energy and intentionality for my continued development. So, perhaps a useful way to look at all these *external searches* I've been engaged in would be to see these also as *internal probes*- pathways into my body of tacit knowledge - constituting a search for my own personal roots, and using the external stimuli (to use Jack's term) as heuristics, bringing my experience out into the (new) light and to new life.

So, using this metaphor, one possible way forward is for me to investigate these multiple themes/interest areas as pathways into my tacit knowledge and intentionality – into the ‘I’ that is doing the researching. Paul’s method of transcribing interactions and looking at antecedents/actions/effects I find appealing – this certainly looks like one way in. But another must be work on autobiography but where to start? When I co-authored a book on systemic work in organisations a few years ago, the three of us all wrote a few pages about our own personal development towards ‘systemic thinking’, and becoming ‘constructionist consultants’. Some of the areas mine touched on include things like e.g. socio-technical analysis, NLP and hypnosis, family therapy, soft systems methodology, complexity theory, etc. I’m thinking I could take those few pages as a starting position, identify the main ideas and themes, and explore the reasons for delving into these: what triggered my interest in the first place?; what was it about the context that enabled the idea to flourish?; what were the outcomes and what came out of it for me in terms of values/skills?; and why/how did it lead on to something else? And then...what does this tell me about the nature of my tacit knowledge and intentionality as a person/action researcher?

So, after all that preamble, and to start the ball rolling, here is the piece I wrote for Donna for the last session. It concerns my first experience of Milan Systemic Family Therapy in the early 90’s.....[note: this appears in the earlier Appendix 5]

APPENDIX 7: Bath CARPP: Note - what kind of 'systems' man am I? , May, 2002

EXTRACT - What kind of 'systems' man am I?: steps along the way

This paper continues my 'search for roots', and introduces the work of Michael Polanyi and my proposed use of his notion of tacit knowledge to help people learn an alternative epistemology for acting strategically in organisations. Initially, however, I respond to Ian's view that I am in a tradition, that of 'systems'. And as an 'appendix' I include my first approach to presenting my research proposal to a potential client, as an example of my 'practice' in seeking to use these ideas. I was also hoping to grapple with Ken Gergen's ideas on the 'relational' self (I attended the Emerging Approaches conference at Hawkswood this week) to clarify just who this 'I' might be who is doing the research.....but I've run out of time. Perhaps I will have written something by the time we meet!

Referring back to our last group discussion on my search for 'roots in the future', I have decided to go along with Ian's view that I am in fact already within a tradition, that of 'systems' - though as you will see later on, I would prefer to call it 'systemic'. And while I'm talking about the importance of names, Ian also felt that 'roots in the future' felt a bit like I was suspended in the air! Recently I read a flier for a process work seminar (Schupbach, 2002) which refers to chaos and complexity theory and the idea that we are 'pulled by the future' and not pushed by the past: the flow of life is non-linear and what attracts us cannot be understood from our everyday consciousness. So for the time being I think I'll stay with 'roots in the future' ...I'm on a journey towards some attractor (perhaps 'strange')!

So let me go back to the 'systems' tradition, and how I might be a part of this. Thinking about my search for new ideas over the years, I feel I have been looking for more effective ways of understanding what goes on in organisations and how people can influence their performance. Or to use more academic jargon, what I've been interested in is developing an alternative epistemology to help me and the managers I'm working with, take more insightful and practical action on an everyday basis. And over the years I've certainly found the 'systems' view to be a useful one. But I've not settled with it, continuing to look elsewhere for ideas to overcome what I felt were shortcomings or blind spots. So it might be useful initially to look at this journey and to identify what these were, and what I did to 'develop' the tradition to suit my own take on things. There is a first description of the journey till 1994 in a book I jointly authored (Campbell, Coldicott, and Kinsella, 1994, pp171-174). Here is a very quick canter through those experiences that seem relevant to this query and further thoughts that bring me right up to date:

- training in work study in 1968 first introduced me to the 'systems' view – very much of the 'input-transformation-output' variety - which seemed very helpful in looking at and designing the physical and information systems in engineering and construction that I was concerned with I often still use these to get a quick see of what might be going on

- when I went into HR consultancy in the mid 70's I started to find that this 'closed' system model while still useful, didn't take account of the fact that people were usually involved in working with these systems and that if ignored, caused all kinds of unintended consequences and operational problems. So I started to look at the literature on 'socio-technical' systems (Passmore and Sherwood, 1978) and job enrichment models which focused much more on the interaction between work and people, so I could start to account for the human side of systems. The focus was still very much on the design aspect – how to design systems that would be more effective
- These new ideas certainly helped me to include motivation and social factors in my thinking but primarily at a general level - there seemed to be more to it when working with particular individuals and groups. And at the turn of the decade, I found this 'more' when I started taking part in the Tavistock Institute working conferences, and later joined the Grubb Institute. It started with me doing an 'organisational role consultation' with Barry Palmer, one of the founding figures at the Grubb Institute (McCaughan and Palmer, 1994) to help me with difficulties I was experiencing in the HR consultancy. I was introduced to a psycho-analytical version of systems thinking, where ideas about emotions, fantasy, beliefs, and the 'inner life' of people were weaved into the pattern. And then the Tavistock conferences that followed made me aware of the possibility of 'unconscious' processes and the hidden life of groups (Bion, 1961), and how e.g. individuals could be used to represent or speak for the group. This view where systems were seen as being 'open' to two-way influencing with the environment was making things more interesting but a lot more complicated.
- I was just getting used to this way of looking at things when in 1980 while still at the Grubb, I came across the 'systemic' approach to therapy developed by the Milan Family Therapy Centre (Burbatti and Formenti, 1988). Two of their principals, Boscolo and Cechin, were working with Bruce Reed of the Grubb Institute and Irving Borwick of ITT, to see how this Batesonian-influenced approach – 'the pattern which connects' - (Bateson, 1973) could be translated into organisations. To my puzzlement, their focus on 'communication' and use of second order cybernetics thinking seemed to go counter to the psycho-analytical take on things.

In this new approach, ideas on the 'inner life' of individuals were shunned. Instead the focus was on the system as a whole – in this case the family unit – and the pattern of 'circular causation' developed by members of a family as it worked out 'rules of a game' to maintain stability in the face of disturbances e.g. an illness, a child leaving home etc. In addition to developing novel ways e.g. paradoxical injunction, to resolve serious problems like anorexia, this group highlighted the influence of the 'observer perspective' on what was seen e.g. the female therapist saw different things to her male colleague (they worked in pairs), the observers behind the one way screen saw different things to the therapists, trainees viewing the session video saw different things to the observers, etc. So what you saw was not an objective fact about the system, but a 'punctuation' which became a part of the system or problem you were thinking about.

- Though I found the whole thing most intriguing, it was quite baffling at the time, requiring a lot of re-thinking of quite basic beliefs about how systems and the

people in them worked. At that time I went back into industry as a director of personnel with lots of things to learn (I'd never done a personnel job before!), so this one went on the back burner, as I explored more conventional things like 'competency analysis' which focus on so-called objective facts about the individual etc. However, there was one new development connected to the 'systems' tradition and that was my coming across the work of Peter Checkland at Lancaster University (Checkland and Scholes, 1990). He had developed an approach he called 'soft systems methodology' (yes, my children also thought this was a funny thing to take to read on holiday!). In this he put forward the idea of systems as something more created in the minds of men rather than being real systems 'out there', and developed an approach to involve people in thinking about such 'soft' systems in a systematic way. I liked the approach and his attempt to clarify the epistemology/methodology involved, but despite its name, after training with him I felt it was very light on the social and political aspects and was mainly a system design tool which usefully involved people, rather than a way of understanding the dynamics of people working in an organisation.

- though I continued to collect papers and read books on the Milan approach while I was doing the personnel job, it was a further 8 years before I re-connected to their systemic 'stuff' when I went back into consultancy in 1988. This time I had the time to engage more fully and do work with Boscolo and Cechin (and Borwick) and develop a fuller understanding of their thinking. Of course by this time things had moved on and other ideas such as the 'autopoietic' self organising systems of biologists Maturana and Varela (Capra, 1997) were influencing the way therapy was being done. So now systems could again be thought of as 'closed' but in a different way – how confusing! The metaphor I found most useful here (offered by Varela at a London seminar) was that of a pilot flying his plane through a fog and relying entirely on his own evolving and personally designed set of instruments to negotiate his way as he 'bumped' into or was 'nudged' by various obstructions. This kind of living system was 'structurally coupled' to its environment, adjusting its *internal* structure i.e. 'learning' and re-making itself, to evolve structurally and find ways of responding rather than adapting to this environment.

While this was perplexing (see Appendix in Stacey, 2001 for some comment on a possible source of this), it first introduced me to the notion that we may *construct* our environments rather than be in them – an idea that has become a lot clearer as I've become familiar with the social constructionist perspective (Gergen, 1999). But more of this later.

- while I was being attracted to these and other developments arising mainly (for me) in the therapy field, Peter Senge published his very influential book *The Fifth Discipline* (Senge, 1990). This brought together a whole lot of models that were linked by what he called 'systemic thinking' to create the 'learning organisation'. Many such as Bohm's work on dialogue (Bohm, 1996), Argyris and Schon's work on action science (Argyris, Putnam, and McLain Smith, 1985) were usefully linked. But as Flood remarks in his review (Flood, 1999), the model of systems he relies on is principally that of system dynamics influenced by Jay Forrester's original work in the physical and social sciences. He ignores or skips over many other important developments by people such as Churchman, Ackoff, Checkland, Beer, and the burgeoning group of complexity theorists. So

although his approach did represent a very useful pulling together of lots of interesting models, there are significant gaps and little of the original thinking such as one finds in e.g. Capra's integration of ideas in *The Web of Life* (Capra, 1996). I can't identify much impact on my basic frame of reference towards systems, as for example made by the Milan School or Foucault, and found that I used his materials mainly as exercises/techniques e.g. how to develop a scenario etc

- So there was something faintly disappointing about this bestselling book. Although his focus was the learning organisation and hence presumably culture, the latter is not even listed in the index. So I think one source of disappointment was this lack of attention to the issue of power relations and discourse, as well as ignoring relevant developments of systems thinking done by others. I've already written at some length about my exposure to and interest in the ideas of Foucault in these areas (Prado, 2000) and so I won't say much here other than to indicate how I see this as associated with the 'systems' tradition as I see it.

Foucault talks about knowledge as situated in discourse which is both historical and lodged in particular institutions e.g. prisons and clinics. So if I want to understand how meaning is created and truth is warranted, I have to get to grips with the particular discourse which holds sway in that section of society, and to understand the practices and power relations that produce and sustain a particular view of life and reality. And further, the need to problematise or deconstruct accepted views of what is going on seems essential if I am to help people in that system create space for other possibilities to emerge. Flood in his review of Senge does identify this lack in the latter's framework but in a disappointingly short chapter, fails even to mention Foucault. His line seems to rely mainly on questioning the 'fairness' of dominant power relations and the need to use participative methods - he for instance talks favourably of Peter Reason's collaborative inquiry as a promising approach. But we seem to be left again with method with not much sense of what might be going on in systems, other than the powerful dominating the weak. And so I felt and feel the need to bring in the Foucauldian perspective on knowledge and power

- earlier on I mentioned the social constructionist perspective and the work of Ken Gergen who has been a pioneer in championing this approach to understanding. Why did I feel that this was a necessary addition to my version of the 'systems' tradition? As I said earlier, the notion of minds creating their own environment had been intriguing, and so when I first met Gergen in the mid 90's, I was stimulated by his view that as nothing existed outside of language - the linguistic turn - you see/experience what is already conditioned by language and not a separate 'reality' that we've got so used to. In other words, we create our own realities in language in conversation with others. Rather than the world impinging itself on us and we then using language to describe it, language comes first and we use it to create the world. It took me some time to grasp the full implications of this view, to take on board the basic position, and to identify the many questions that this extreme stance raises. In fact some have only very recently surfaced e.g. the idea that the environment does constrain our constructions, and that we can and do use technologies of different kinds in addition to language to influence this environment (Burkitt, 1999), where in social construction as Gergen puts it, ontology is 'mute'.

Seeing Ken and his wife Mary in action this week, putting the case most convincingly once again for social construction - but this time with more openness to other theories - I remain persuaded that the 'relational' view implicit in social construction i.e. that language obtains its meaning not from mirroring an objective reality out there, but **through use in a language game (Wittgenstein, 1958)** within relationships within a community, is a useful and valid one. And if this is so, how can I talk about systems without acknowledging that any system and its power relations and systems of meaning is something defined in language by members of a community of practice; and that it's difficult if not impossible for an outsider to even get close to this. With this belief in place, the benefit of local involvement in systems change becomes obvious. So again, I've felt the need to add something more - this social constructionist perspective - to the systems tradition I'm following, even though this is not addressed in the systems literature even by someone as open and forward looking as Flood.

- The most recent development on this systems journey comes from the new complexity literature (Prigogine and Stengers, 1985). I started coming across these ideas some time ago e.g. in the writing of Margaret Wheatley (Wheatley, 1992) and though I felt there was something there that I needed to take on board, I couldn't quite see how to connect with it. Again I hung on to these ideas for several years. I think the concept which helped to make that connection was that of 'emergence', something I'd already 'invented' for myself when developing what I called an 'emergent' approach to project management when working with National Power in the mid 90's. For example in this approach, 'milestones' are not dates when an activity has been completed, but occasions where people from different interest groups can get together to figure out what they believe has actually been achieved and learned – what has emerged? I'd got there through social construction – we create meaning in relationship - a word I speak does not have a meaning until I get a response from my interlocutor. So meaning emerges after the interchange (see also Bohm's ideas on thinking here). Stacey's recent work (Stacey, 2001) has helped me to make more explicit connections and now I'm at a stage where I'm hoping, following Polanyi (Polanyi, 1966), that I might be able to make a more substantial integration that meets Valery's idea on the relation between originality and influence, of 'derived achievement' rather than 'crude weight' (Said, 1997).

So that ends my quick trawl through the 'systems' tradition that I seem to have been following, adapting, and evolving. If I take someone like Robert Flood as a key up to date voice in this tradition (Flood, 1999) I can identify with a lot of what he offers. But there are still areas which are ignored or only touched on lightly and which I would want to pursue further. Hence my continuing interest in the work of Gergen and Foucault touched on above, and another I've just referred to, Michael Polanyi. These authors represent knowledge domains which I feel also need to be associated with this systems tradition, and to influence the practical methods I use to engage with clients. So yes, Ian, I am walking down this path but feeling the need to keep pushing at its edges!

APPENDIX 8: Bath CARPP: Note – Foucault, June, 02

EXTRACT - Who is the 'I' seeking 'roots in the future' in books?

This paper continues the exploration of the 'I' who is doing the researching, started in the last paper where I first framed the idea of 'roots in the future', and began the search with a first look at my initiation to systemic family therapy. I've long been an avid reader of non fiction books of the 'learn something new' variety (much to the despair of my family!), and so this time I want to have a first look at some authors whom I'm currently reading: why am I interested in them and how may they be influencing this 'I'? What might I discover about this 'I' if I can learn more about what it is that has caught my attention and why and, following Jack's question, how might their ideas be influencing me and my approach? Here I am mindful of the quote from Valery offered by Jack recently, on the relation between originality and influence...will I find just 'crude weight' or start to identify a kind of 'derived achievement' associated with originality? (Said, 1997).

Before I look at the first of these authors, Michel Foucault, and to identify a focus for this review, let me start with a brief look at the research question (an edited version) I prepared and sent to you all last month. If I unpack this statement a little, what are some of the key ideas and theories I'm hoping to build on/exploit in delivering this research?

'How do I improve my practice as an independent facilitator to help managers in large bureaucratic organisations improve their communication skills in order to create informal, innovative, issue-oriented and cross-disciplinary communities which support and enhance the effectiveness of their organisations'

My current practice as a facilitator is influenced by what I'm calling a 'systemic stance'. This stance involves me in modelling/teaching ideas and techniques which go under the terms 'systemic' and 'social constructionist' and which also address the issue of Foucauldian power relations. The main resources I use here are systemic thinking as developed by the **Milan School** of family therapy (Campbell et al, 1994), social constructionist thinking as typified in the writings of **Ken Gergen** (Gergen, 1999), and **Michel Foucault's** work on power/knowledge (Prado, 2000).

For the research, my plan is to work with managers in small action learning or inquiry groups, ideally as part of some wider organisation development initiative. While I'm working from this more 'universal' systemic stance, a major challenge for me will be to attend to the managers' own local and tacit knowledge, and to help the group draw out, value and use all the knowledge which they possess as a group. A main resource for me here will be the work of **Michael Polanyi** (Polanyi, 1956) whose ideas about tacit knowledge and how learning takes place are critical. I will also be leaning on some ideas of **Michael White** (White, 1997), a Foucault influenced narrative therapist, to employ the power of the group to enrich, support, and validate the learning that is emerging.

What kind of communication skills/perspectives will I be trying to develop in the managers I work with? By modelling a systemic stance and using action and appreciative inquiry methods (Torbert, 2000; and Cooperrider, 1990), I'm hoping to help managers develop a range of new perspectives and enhanced confidence to act more effectively on the issues they are addressing. Here I will be using the work on 'levels' of leadership capability developed by **Bill Torbert** et al (Torbert, 2000). In particular, I want to use the level they call 'strategist' which I think aptly captures the new perspectives I believe managers need to develop to perform in more innovative, fluid, and 'counter-bureaucratic' ways.

Finally, I'm expecting the managers to tackle what I see as one of the most significant problems facing large functional and control-oriented bureaucratic organisations - creating informal, cross-discipline, fluid, issue-oriented inquiry communities that can provide a flexible, responsive and innovative counter balance to the plan and control-orientated focus of the formal organisation. I'm attracted to the 'edge of chaos' work in this area and am looking to the ideas of people like **Ralph Stacey** (Stacey, 2001) to help develop practical initiatives in this area. I'm also intending to use here the ideas on developing action inquiry communities developed by Torbert et al, to seek to influence - as Jack puts it in his e mail of 29 May - the education of a new social formation.

So these are the main theorists/practitioners I've latched onto over recent years, and whose ideas I feel will provide useful frameworks and a stimulus to new thinking with the people I'll be working with. Though they represent a diverse set of approaches, I'm hoping that I will be able to find, using Gregory Bateson's word, a new 'punctuation' of their ideas in my chosen context - large bureaucracies, that will move beyond Valery's 'crude weight'!

So much for scene setting. In the remainder of this paper, I would like to have a first go at considering the influence and application of the ideas of one of these authors, Michel Foucault. I find him a fascinating thinker, but difficult and 'slippery' - so what is it that has kept me coming back for more for over 10 years? In what follows, I'm going to try and write in a way which more clearly surfaces my own values and see what emerges from this writing. I'm also trying to keep in mind the idea of identifying a 'thread of continuity' mentioned in the paper provided by Donna Ladkin (Janesick, 2000).

So to Michael Foucault. I recall I first heard his name in the early 90's when I was doing some management training/facilitation in Scotland with the SDA - and one of the participants said that he thought I'd be interested in his ideas given the way I was working with them. He recommended *The Will to Truth* by Sheridan as a starter. I bought the book but found it very heavy going at the time and entirely failed to get into it. But a seed of some kind had been sown. So looking back at the book now I see that I started underlying certain passages in the second part to do with Discourse, Power, Knowledge - and I'm taking as a working hypothesis that there was something in these passages that has kept the invisible seed of interest going for the past 10 years. Here are a few excerpts:

No body of knowledge can be formed without a system of communications, records, accumulation and displacement which is in itself a form of power and which is linked, in its existence and functioning to the other forms of power. Conversely, no power can be exercised without the extraction, appropriation, distribution or retention of knowledge. (Foucault quoted in Sheridan, 1980, p131)

.....Lastly it is Foucault's thesis that our own societies are maintained not by army, police, and a centralized, visible state apparatus, but precisely by those techniques of dressage, discipline, and diffused power at work in 'carceral' institutions. (Sheridan, 1980, p136)

But this power is exercised rather than possessed; it is not the 'privilege' of a dominant class, which exercises it actively upon a passive, dominated class. It is rather exercised through and by the dominated.....Because 'power' is multiple and ubiquitous, the struggle against it must be localised. Equally, however, because it is a network and not a collection of isolated points, each localised struggle induces effects on the entire network (Foucault quoted in Sheridan, 1980, p139)

I think the ideas which caused me to underline these statements at the time are connected to: power and knowledge as separate but interdependent entities – so knowledge can offer a way into power; the idea of state (and organisation) control as being exercised through techniques of ‘dressage’ and discipline operating in a diffused network – so the possibility of influencing these techniques as a way of changing existing power structures; and the notion of power as exercised through self administered disciplines, local in operation but affecting the whole...a kind of ‘bottom-up’ power – so the need for active participation in the maintaining of norms, and hence the possibility of actively changing these norms, and so influencing other parts of the ‘network’.

Years later I did try again and found two more accessible introductions to his ideas. One focussed on HR methodology in organisations (Townley, 1994). Here is a quote from my underlining:

A Foucauldian analysis of HRM construes it as a discourse and a set of practices which attempt to narrow the gap between the capacity to work and its exercise. It constructs and produces knowledge which renders visible the arena of work for the purposes of governance. It operates as the ‘will to knowledge’, which organises the analytical space of the employment relationship, attempting to reduce the indeterminacy resulting from the unspecified nature of contract.... These personnel practices do not ‘reflect’ reality, they order and create it (Townley 1994, pp13-14)

In an earlier life I had been a senior HR professional, and I felt a sense of real shock when reading this book. Of course I’d read about the dangers of ‘managerialism’ – the tendency to just see working life through corporate spectacles. But to become aware that rather than seeking truth, we HR professionals were instead using our techniques of assessment and appraisal, to construct a discourse which ‘rendered visible the work arena’ in order to define what passed for truth in the area of ‘human resources’, cut much closer to the bone. With the best intentions in mind, I too had been a prime mover in introducing the so-called ‘latest thinking’ to my organisation e.g. competency frameworks and assessment centres. And as the professional ‘expert’, I’d used these so-called expert knowledges to create and order reality, not as I believed at the time, to map what was there. And it had all seemed so natural at the time, as though all I was doing was being a fair and neutral observer, without any axe to grind, without any ‘rank’ (Mindell, 1995)) to blinker my vision and relations with others less expert. I still shudder when I think about how naïve I was at the time, and how I so easily became an active agent of my own subjugation to this view of organisational practice.

The other I came across by accident during one of my probes into therapy training in an approach to narrative therapy developed by Michael White (White, 1997). Here is another quote from my underlining at the time:

In breaking us from the will to truth, and from explorations into the veracity of the various truth claims that are informed by this will, post-structuralist inquiry makes it possible for us to explore the history of these claims about the truth of human nature, and the practices of life which are associated with such claims. This is an inquiry that renders visible the use to which these claims have been put. This is an inquiry that contributes to the identification of the real effects of these claims and practices in the constitution of life. (White, 1997, p 223)

Within the smaller more intimate setting of family therapy, I was able to become more aware experientially of the power of this ‘will to truth’ – that there is a truth and we can discover it - and how easily behind the screen of professional identity, we can distance ourselves from the real effects of what we are doing e.g. using professional expertise and rank to influence persons to shape their lives in a particular socially approved way.

Because we of course are just doing our job ‘professionally’, using ‘neutral’ techniques to collect ‘facts’ and make ‘rational’ decisions. We don’t have a personal interest in these matters, and as we are not part of the ‘system’ in view, we can be ‘objective’. So we don’t feel a responsibility for the ‘effects’ of what we do. As Foucault himself put it: ‘people know what they do; they frequently know why they do what they do; but what they don’t know is what what they do, does’ (quoted in Prado, 2000, p 29). In other words we don’t know the *effects* of our actions....and it is these that provide the energy and lattice work for this impersonal diffused power that creates the sense of a pervasive and constant surveillance and subsequently the ‘docile bodies’ society seems to require.

This realisation – our tendency to marginalize local knowledge, especially of the ‘tacit’ variety in favour of our expert ‘universal’ knowledge, and that we don’t know the effects of what we do - has had a particularly strong effect on me, making me behave in a far humbler and tentative manner than earlier in my career. It in fact became the main driving force for writing an internal paper with Tim Coldicott which later led us to co-author a book with David Campbell (Campbell et al, 1994, see Chapter 2). Looking again at the ten principles we identified, I again experience strongly the bind of on the one hand, wanting to bring the word – the exciting ‘new’ ideas and knowledge’ - to people so they can find their true voice and be more effective, and on the other, this sense of being caught up in a false dream where the harder I try the more I actually shut people down. This still remains a strong quality in my work and persuades me to pay much more attention to the views and standards of clients rather than to my own.

In this regard I remember the sense of disbelief and perhaps even ridicule amongst some CARPP 7 class members during the discussion of my ‘learning pathways’ case - when I said that during action learning sessions I often took my cues about what was important and OK to work on, *from the managers!* Wasn’t it my job rather to challenge orthodoxy and the group process? At the time I wasn’t sure what to make of this reaction....I remember saying to myself, ‘well of course I challenge what’s going on some of the time when it seems necessary...’. But on reflection I think that one of my values now is to do less of this challenging, certainly during the early stages and pay a lot more attention to where the managers seem to be coming from, encouraging them to voice their deeply held views, trying to get a sense of where their tacit knowledge may lie, and so on. And in this regard I find the ‘de-centred practices’ that Michael White (White, 1997) has more recently developed to account for power relations in the client’s context and in the therapy relationship, very insightful and I hope to use these as a guide for developing my own practices with my clients.

These two books encouraged me to dig further and I now possess a collection of some two dozen books by Foucault and various expert commentators - there must be something important there for me! So very slowly things have started to fall a little more into place - but I continue to find the ideas both complex and ‘slippery’ and hard to keep hold of for very long. I suppose they are quite counter-intuitive, which is one of the things that does attract me. So though complex and difficult, I believe he has got something unique and important to offer me and others who work with change in large organisations. So what is it that draws me to his ideas?

I think the overall attraction is the promise of a new and powerful perspective on the world, and one which offers the opportunity to get closer to the ‘truth’ or ‘reality’ of living not in a universal world but in a world defined by a particular discourse. What I particularly like is the fact that the basic intent of his genealogical analysis is to problematise accepted views, to challenge and undermine what seems natural as defined by the mainstream or dominant coalitions. I also like the fact that it doesn’t try to replace epistemology by proposing a new version of ‘the truth’; instead by challenging the status quo, it allows forgotten or marginalised voices to be heard, opening up new

possibilities for influence and sense making and for a 'multiverse' to emerge. Finally I'm attracted to his positive 'shaping' view of power – it's not just a repressive force but is constitutive of life. In his later work on personal ethics he takes this thinking further to offer the possibility of a less deterministic view of the individual, with productive interchanges between power relations and individual intentionality. I comment on this later on.

Why should I be interested in these views? One obvious connection must be to my upbringing in apartheid-ridden South Africa and my admittedly passive and tacit awareness of the marginalisation of a large part of society. Less obvious but felt strongly is my own sense of fragmentation associated with the separation not only of white from colour but also white from white: many of the voices that I should have within me as a South African are poorly developed or mute. I remember this being brought home to me very strongly at the Worldwork Conference in Bombay in 1999 when experiencing the power and insights of the Maori traditions in a conference colleague – he seemed vivid, serene, and larger than life while I felt like a dried up husk with few resources to call on and little to contribute. So although at high school and university I seemed to be an ideal, mainstream student – academic, good at sports, head boy, etc – at a deep but largely tacit level I guess I must have felt frustrated by the mainstream domination of discourse (I certainly do now), and quite easily slip into the attitude of rebel and guerrilla fighter.

This certainly has coloured my work as manager and consultant. Since settling in England in the 1970's, much of my work experience as a manager, HR professional, and consultant has been in large bureaucracies like GKN, Hoechst AG, NATS and the BBC. I can readily identify with what I now see as the numbing effects that the formal aspects of bureaucratic life induce, even in the most motivated and creative workers. I can also identify with the self-subjugating process of striving to achieve what seem to be generally admired ideals – being action oriented, an achiever, having a career, adopting organisational norms of dress and thinking, etc. In both the line roles I took on during my 'career' proper, I was often seen by others to be going against the grain of mainstream thinking, and as a consultant I've been told many times that I should be careful not to be seen as biting the hand that feeds me.

This has been particularly obvious during my work with the BBC over the past 10 years, where I've been involved in facilitating countless discussions amongst key decision makers. I've regularly been appalled at how timid and passive intelligent and powerful people can act, blaming 'them' up there for the problems they are facing, adopting passive stances, and acting without risk and creativity as though imprisoned in some kind of externally imposed 'normality'. But decreed by 'whom' if not by themselves? It is here when I've been faced with the dispiriting effects of disciplinary power on client confidence and action, I've longed to help them see an alternative view: that it is they acting as members of a loose, informal network, who are creating the barriers to more effective action; and if they are unhappy with the results or consequences, that they have a real possibility through changing their discourse, of constituting themselves in different ways. It is here that I've often been cast in the role of 'inciter of rebellion against Birtism' etc as I've sought to stimulate some 'fight' against no doubt well intentioned but unworkable 'reforms' which have been draining the spirit from this unique organisation. I've also gone so far as to promote a stance of 'guerilla warfare' against bureaucracy in several of the action learning sets I've facilitated. Admittedly I was doing this at what I took to be the implicit invitation of the then new HR Director, for staff to create what he called a new, more 'communal' culture. I even took the liberty of writing him a personal letter of some 10 pages giving him the benefit of my 10 years experience of his new organisation. And lest you think

this is turning into a ‘hero’s story’I didn’t even get an acknowledgement! But I think this perhaps does start to show a certain side to my character and hint at things I value.

But despite these setbacks, Foucault’s notion of a dispersed and impersonal power permeating all the interstices of a system, exercised locally, and constitutive of life, continues to fill my rebel sails with hope: that the deadening and apparently unavoidable effects of the ‘control’ cultures of large organisations can indeed be successfully confronted; and that more creative and satisfying way of working to produce goods and services can be developed and kept fresh and responsive to the needs of the many stakeholders that they serve!

And it is in his later work, contained mainly in the three volumes of *The History of Sexuality* that I draw further inspiration. In his early work, he never seems to take the idea of ‘the individual’ for granted (McHoul and Grice, 1993), focussing rather on the historical conditions that made it possible for certain kinds of subjectivity to emerge e.g. prisoners, mental patients, etc. But in his later writings, this changes and the possibility of a countervailing knowledge derived from knowledge of self *by the self* (as against external controls), establishes the potential of a dynamic yin-yang type of relationship between individual as object and subject, and the idea of life as a work of art:

If I tell the truth about myself... it is in part that I am constituted as a subject across a number of power relations which are exerted over me and which I exert over others (Foucault, 1990, as quoted in McHoul and Grice)

What strikes me is the fact that in our society, art has become something which is related only to objects and not to individuals, or to life. That art is something which is specialised or which is done by experts who are artists. But couldn't everyone's life become a work of art?... From the idea that the self is not given to us, I think that there is only one practical consequence: we have to create ourselves as a work of art (Foucault in Rabinow, 1987)

In this search for an ‘aesthetics of existence’ (Foucault, 1989 as quoted in McHoul and Grace) – in essence a practical way of life – Foucault raises in me the hope that in my own life and in those I work with, it is possible despite the masking and insidious effects of disciplinary power, to become an *agent* in the production of our own lives and those around us. Lives that are more creative and in the face of a fast disappearing public morality, can seek to develop a personal ethics through practice, that is not marginalizing of ‘the other’ and can counter the negative effects of ‘corporate’ living.

I came across the following poem by Rilke at a seminar last year introducing Torbert’s work on leadership ‘levels’ – the Leadership Maturity Framework. It expresses very well the sense of possibility that I feel as I’m writing these last words. Rilke imagines the very being of man as a great song. For this song to sing through you, to be you, you must live life ever more widely...this is what ambition means: walking the ambit, going the limits of the perimeter in ever growing orbits

I Live My Life

I live my life in growing orbits,
which move out over the things in the world.
Perhaps I can never achieve the last,
but that will be my attempt.

I am circling around God, around the ancient tower,
and I have been circling for a thousand years,
and I still don't know if I am a falcon,
or a storm, or a great song.

Rainer Maria Rilke

So to sum up briefly, I think Foucault offers me, in the face of what Ken Gergen calls 'the siege of the self' (Gergen, 1991), the possibility of crafting my 'self' as 'a great song' - but in relation to the 'other' and not as a free standing 'atom' of modernity. And in my work in organisations, through casting new light on the nature, techniques, and effects of 'impersonal' power relations, to help me help others to produce their own 'great songs' while supporting the legitimate aims of their organisations.

Well....are there any 'roots' showing?

APPENDIX 9: Bath CARPP: Note – Polanyi, September, 02

EXTRACT - Towards a dialogic architecture for developing ‘strategist’ leaders

What role for ‘tacit knowledge’?

Let me go back a step and re-state what I think I’m about here. In practical terms, I’m particularly interested in helping the professional groups who make up a complex organisation and who occupy different subcultures, to learn what I might call ‘strategic communications’. When I work with a group involving accountants and programme makers, I often feel that they are just talking at each other and no real communication is taking place. There seems to be little appreciation of one’s own standpoint or that of ‘the other’. They often need to work together during periods of change to create the new rules by which the organisation should be run. And although people seem to think that these can be decided upon beforehand, these rules by their very nature need to ‘emerge’ through practice. I think here of the writings of Richard Bernstein (Bernstein, 1991) to do with incommensurability, where different groups need to be helped to reach what I call a ‘beyond position’ where they can talk to each other from their subcultures but in a dialogic sense, and so create a new language to condition future relations. I realise now that this connects with the idea of organisations as communities of practice (Wenger 1998), and that probably what I’m trying to do is understand the processes by which new such communities of practice can be developed.

For me this means that the different professionals need to become much more aware of their own tacit knowledge e.g. assumptions, beliefs, root metaphors, etc, before they can understand these ‘others’. (though I believe this will have to come from interaction with the others to a large extent). To help them do this I have this idea that my so-called ‘systemic syllabus’ that I’ve referred to in earlier papers could help with this process – through introducing them to an alternative ‘post-conventional’ epistemology to do with relatedness, social construction, power relations, and emergence. Following Polanyi (Polanyi, 1966) - ‘we know more than we can tell’ - I see that this alternative epistemology could be something like a moral framework which acts as the ‘proximal term’ through which life is viewed. He states that tacit knowledge has two components that are related in a hierarchical way, the *proximal* (subsidiary awareness) and the *distal* (focal awareness). Though both may be known, only one can be told: generally we attend *from* one, the proximal, *to* the distal, displacing attention and meaning *away* from the body. So we comprehend an entity (focal awareness), e.g. an idea or object, by relying on our awareness of its particulars (subsidiary awareness), for attending to their joint meaning, in what is an emergent process: the outcome at the focal level – explicit knowledge - cannot be predicted from rules operating at the subsidiary level.

Whenever we do this, we are using the subsidiary awareness as a tool to extend our body out into the world, like a blind man using a stick. Though the end of the man's body is his hand, after a while it's the end of the stick that becomes what is focussed on for meaning. Whenever we use something to function as a proximal term of tacit knowledge, we incorporate it into our body, or extend our body to include it - so that we come to dwell in it and it becomes a sentient extension of our body. So as we accrue tacit knowledge it extends our reach out into the world and closer to what Polanyi would call something hidden 'out there'. So our body becomes the ultimate instrument of all our external knowledge, and there can be no purely objective knowledge.

Going further with this line of thought, Polanyi talks about acceptance of moral teachings as an 'interiorisation' - by making them function as the proximal term of a tacit moral knowledge as applied in practice. He says 'to rely on a theory for understanding nature is to interiorise it.....we attend to the world from the theory....attending to things seen in its light, in terms of the spectacle it serves to explain'. Theory can only be learned by practising its application - 'true knowledge lies in our ability to use it'. So a true knowledge of a theory can only be established after it has been interiorised and extensively used to interpret experience. In other words by interiorising and dwelling in these ideas, people can create at a tacit level an alternative way, a theory, for viewing experience - a different lens from which to view reality. This process of interiorisation cannot be one that is predetermined. Again as Polanyi says 'the creation of new values is a tacit process in which people submit to these new values' – so that they become a tacit part of us without us being aware of it. So we submit to them by the very act of creating/adopting them. He says if any theory is to create a true knowledge it must be interiorised and used extensively before it can become something that one relies on tacitly.

So one of the big challenges for me is how to work with managers to help them develop such an alternative epistemology through interiorisation, so that it becomes something that influences their perception and behaviour as they go about working to improve their own effectiveness and that of the organisation. Polanyi makes the point that the transmission of knowledge must primarily be a tacit process, where one must believe that something that might initially appear meaningless has in fact a meaning – hence the need for acceptance of some kind of authority object e.g. a teacher who is indwelling such a view. As Polanyi quotes St Augustin- 'unless you believe, you shall not understand'.

So it seems to me that any process I adopt with managers will need to be experiential - so that people can experience tacitly both the focal and subsidiary factors in the 'gestalt' - otherwise they'll just get surface explicit knowledge. Secondly I think it would be sensible to work in mixed groups so that the discussions can reveal both what common and what is different at the tacit level. In other words we can approach the phenomenon of dialogue where people are able to see both their own assumptions and those of others (Bohm in Senge, 1992). As Polanyi points out, for this to become a part of tacit knowledge, people must use these ideas to work on real issues, in other words to dwell in them. This is what I see as the action phase of the action learning process and in our subsequent action inquiry discussions within the group - which I would call the reflection phase – we would work to raise awareness of the subsidiary factors which appear to be involved in the focal integration - and can challenge and enrich these through dialogic discussions. In this way I would hope to raise awareness of what it is that leads professional people to see things in particular ways, to help them develop skills in creating more dialogic processes with their colleagues in the workplace.

As most of this seems to be about tacit knowledge, I am aware that it would make sense to introduce other means of expression apart from written text, in other words to use non-textual or varied textual methods. So it would seem to be useful for me to include poems, stories, metaphors, and other visual and artistic means to help people become aware of their tacit knowledge and be helped to understand the subsidiary factors in more detail. This feels to me to relate quite closely to Jack Whitehead's concept of 'living theory' where he says that it's not possible to wholly represent the learning and understanding just with sets of interconnected propositions. Analysis of tacit knowledge

could help generate notions of why and how a person lives their values of humanity in ways which are not dependent wholly on propositional knowledge.

I was hoping to draw some interim conclusions here about the 'I' doing the research using Ken Gergen's views on the relational self – what kind of an 'I' constituted historically and contemporaneously in relations and discourse is possible? - implied by this perspective embedded in the social constructionist discourse. I'll try to write something on this for our meeting together, with any other revisions that might occur to me by then.

I also attach a copy of a paper I've written to a client in NATS to give some background to my proposed research. In the second part of the paper I put forward a methodology for doing the work, which I hope is imbued with the spirit if not the detail of the ideas that I've written about here and earlier. It should provide an interesting example of theory translated into practice – I would be interested in any 'living contradictions' you spy!

APPENDIX 10: Bath CARPP: Diploma Transfer Paper, March, 2003

EXTRACT - Notes for review of research purpose and method for MPhil phase

I was pleased to get through the Diploma transfer in March. I had put in a lot of work during February and the finishing process had built up a head of steam in me.....I was beginning to feel I actually might at last be on the way to completing a piece of original research work worthy of a PhD at some point in the future.

But the transfer discussion on the day left me feeling a little adrift. I had got the impression from earlier comments made by our professors/tutors, that the discussion itself, rather than being just a static evaluation of a piece of work, often was a more dynamic process, providing a further step along the research route - opening up important new questions and offering new ideas to pursue. That didn't happen for me on the day or after reflection in the week or so that followed.

So what was I expecting/hoping for? Given the diversity of the material I had put together in the paper and the multiple approaches I was planning to follow in the forthcoming year, there did seem to me to be a fundamental question about my purpose/scope and identity as an action researcher. Donna did allude to this in her jokey remark about a 'smorgasbord' - but that left me feeling that my materials did not have any sense of underlying coherence; just a range of dishes that had tickled my fancy and that I enjoyed tasting/playing with. So I guess at some level I had been hoping that the discussion/challenges would have surfaced something about these basic questions that was still below my awareness, and that would have given me a clearer line to follow this year.

After initial reflection, I felt that I needed and was still 'due' this kind of insight out of the transfer process. So I thought I would try someone not involved with my work at all and ask for a second opinion. I decided to ask Judi Marshall because of her interest in 'systemic thinking' and after she kindly agreed, asked her to look particularly for any underlying themes in the paper as a whole, that might cast more light on my concerns. We eventually met for an hour in May in a very noisy coffee house near Bristol University (my digital recorder captures wonderfully the sound of coffee machines hard at work and, occasionally, what Judi and I are saying!). She had made a lot of notes as she read through the paper (which she later gave me) but the discussion was more free-flowing as she 'facilitated' me through the main questions she had formed.

And while the hoped for shadowy phoenix of 'purpose/scope/identity' did not arise from this re-kindling of the ashes of my paper, what follows in this paper is my processing of this discussion, and linked ideas that have formed in consequent activities: working on a couple of occasions with the BBC; taking part in several 'embodiment' inquiries that Donna set up with a small group in Bath; my reading of a couple of the Hertfordshire Complexity Group publications; my first reactions to the 'presencing' paper by Scharmer that I saw referenced by Jack in an e mail response to Jason; and some work I've been doing on language with the Clean Language and Metaphor development group I'm part of. I'm hoping the edges of a more coherent approach to my research will start to show and that the path forward will become clearer to me as I write this paper and talk with you during our discussion on Friday.

Developments since March 7

Here are a series of linked points that have emerged from these experiences and which point to a prospective mode of working for me that could be both research orientated and about practical action in the present:

1. In my discussion with Judi she mentioned that she thought I was formidably 'resourced'and that I must meet Ashby's law of requisite variety by now! How come I was still interested in such a variety of ideas.....was I dissatisfied with myself in some way.....and would this continual search for 'more/better' perhaps become degenerative? More on this perhaps later in the year...
2. But obviously the word 'resourced' and the commendation stuck with me because a few nights later I had a dream to do with my work on 'embodiment' in which the word 'resourceful' was mentioned a few times. In the dream it seemed to have the meaning 'many *sources*' – so being re-*sourced* meant having access to many sources of knowledge, skill, etc.
3. In parallel, I'd had a brief but useful discussion with Chris Seeley (who teaches on the MSc) at the second of our group meetings to inquire into 'embodiment'. In the context of a discussion about the relevance of the idea of foveal/peripheral vision, I'd made a connection to Arnie Mindell's notions of 'little me' and 'big me' as partial/wholistic (or critical/compassionate) vantage points from which to judge experience. She mentioned John Rowan's exercise on multiple selves and I started to think about the *big ME* as *the* embodied self, and the *little me*'s as lots of partial/fragmented parts or aspects of this potentially embodied self.
4. In this frame, the many 'sources' I have access to like systemic thinking, social construction, power relations, etc, are like the little me's. And being embodied is not a single state but is instead a dynamic *process* of **oscillating** between the big me and these little me's in a mindful (in the Buddhist tradition) and timely way (see my earlier note to Bill Torbert about this notion of taking action in the present). The embodiment challenge is, amongst other things, about staying open to the multiple sources of understanding and finding ways of allowing these to integrate into timely actions.
5. On another angle of attack, Judi had mentioned Patricia Shaw's work on complexity (Shaw, 2002) and the use of a conversational approach to strategy and change. Through reading her ideas of 'opening conversations' - which I took to be essentially *contextualising* interactions - I'd come across her colleague Douglas Griffin's work on leadership and ethics (Griffin, 2002). Though irritated by his ungenerous dismissal of systemic thinking, I liked his way of talking about a 'living present' where the future is constructed within enabling conditions from the past; and ethics is to do with an ongoing understanding of the meanings of actions that could not be known in advance. In this more spacious and participative sense of the present, things like identity formation and social context arise *at the same time*, not sequentially in a *both...and* manner. This idea linked to my own notion of 'creating the future in the present' (see BBC brochure) and my own research metaphor to do with looking for 'roots in the future'. This work offered me further encouragement to try and work creatively with managers to embody in the present, some desired conception of an immediate future, and learning to walk the talk *as you talk*.

6. During this period I also had two meetings with different groups of BBC managers which provided opportunities for me to feel these ideas out in practical contexts:

i) *Action learning session*: when my pre-work, proposed agenda, and opening invitation with this ongoing group, to review experiences arising from our visit to meet the Everton FC manager, failed to strike much of a chord with this group, I started following their conversation very closely looking for ways to support what *they* seemed to be up to. My digital recording of the 3 hour discussion shows a range of interventions oriented towards helping them as a group clarify what they wanted to do, explore possible ways of starting the process, and agreeing first steps. At the end of the meeting people said they were surprised and amazed at what they had thought, talked about, and decided to do.....the session had explored ground they (or I) had never thought of tackling before. Some typical interventions:

* *offer a possible way of framing the different meetings they have*
* *suggest that current meetings may be doubly disempowering: they don't feel they can influence the boss in the meetings, or influence the kinds of meetings he is holding – nothing to do with us!*

* *ask: 'what is it you are doing that supports this kind of cycle'*

* *suggest ideas in current discussion mirrors the boss' process – seeking consensus before meetings take place...challenge: aren't you looking for more variety in your discussions?*

* *introduce frame of working at 'edge of chaos'....current meetings at very stable end of continuum....benefits of moving over more towards chaos end....increased diversity of views/creative thinking/etc*

* *ask: 'what steps could you take before/during meetings to shift the balance towards the chaos side to encourage more creativity?'*

ii) *Distribution Team set up meeting*: this was a first meeting of this new team several months after a major change had been announced but nothing else done. Symptomatically for the controller, we started without a stated purpose or agenda for our time together. At the outset, I framed this positively and talked briefly about the notion of how we construct our futures not in grand plans/formal agendas but in what we do in our informal interactions in the present. I invited them to be aware *as they worked* of what kind of a future they seemed to be constructing and comparing this to what they were saying they wanted to create. Like the previous meeting, the digital tape shows a range of facilitating interventions that seek to help people become more aware of how they are constructing a future as they work in the present. I was surprised at the lengths of time I kept quiet, not worrying too much at the way the conversation jumped up and down through different levels of abstraction, letting it flow as it seemed to be meeting *their* needs. As a result of this meeting, the new team felt they had 'come together' well, had made good progress on a number of practical issues, and were feeling a lot more confident about launching a new relationship with the staff. The boss sent me an e mail saying I had been 'great'- though I hadn't done much.

Both of these sessions impressed me with the potential for working in a far more fluid and creative way with whatever comes up: both groups felt they had had very creative and productive sessions; and I seemed able to make enough useful but low profile contributions while following their lead, to ‘justify’ my presence (though in the case of the Distribution team, they’ve now felt able to continue without me for the time being....not high profile enough!). A quick review of my actions suggests that I’ve already moved to a stance where I’m more focussed on mutual inquiring, and more ready to share and then pursue the use of different frameworks. So I was encouraged and stimulated to continue with this train of thought. (Note: I intend to transcribe sections from both of these sessions to provide basic data for detailed analysis and challenge)

7. And then I came across the Jack reference to Scharmer’s article on ‘presencing’ (Scharmer, 2000). On first looking at the paper I felt a shock of recognition: he was using ‘my’ model of change in his paper! Admittedly, I only had five elements in mine – what in my earlier book (1994) I’d called the 4 E’s of cultural change (now five) – but the similarities were clearly there, particularly in the language used; and I’d never even heard of this chap. More on his paper later, but for now it certainly seemed to chime with the other things that were coming up and made me feel even more that I was on the right track - continue pursuing the goal of working on the future in the present *and* raising awareness of the tacit knowledge available to people to deepen their awareness and power-up their imaginations.
8. In my Diploma paper (see page 33) I had worried about losing my identity/expertise (and all those lovely theories) if I started to work in a more mutual way: just what would I be bringing to the party? In my reflections thereafter I began to ponder over this. I realised that I’ve a particular interest in ‘frames’ and ‘framing’ (perhaps another word for *context* and *contextualising*)... so how could I use this interest in framing to offer multiple frames in a process of *mutual* inquiry. What if I kept away from client *content* and and were able to focus my attention and interventions on how they were and could contextualise the situation at hand? Would this not allow a ‘Gandhian becoming’ to emerge, brought forth in interaction?

With this possibility at the back of my mind, I took part in three ‘clean language’ development days where we’ve been digging down below the basic theory/practice of this approach to *language and metaphor*. During these sessions we’ve looked particularly at the assumptions underlying the use of ‘clean’ questions to subtly point clients to issues of ‘context’ and ‘multiple perspectives/perceivers’. The associated practice sessions have encouraged me to believe that it will be possible for me through skilful use of these questioning techniques, to adopt a more *mutual* approach to my inquiry without losing my *re-source*-fulness. And further, through analysis of selected transcripts of these discussions of emerging futures, to identify and work on my own learning edges in becoming a facilitator of what Scharmer calls ‘presencing’. While this final element of recent experience does not add a new dimension to my model, it does provide additional techniques which will help me practice the kind of mutual inquiry I’m gravitating towards

So how does this argument influence my proposed way of working....what has happened to my thinking since I wrote the diploma paper? To review this, here are the six points I made on p. 33 of the diploma paper plus my wrap-up paragraph:

- based on the Buber idea mentioned earlier, can I use my creative imagination to offer clients in the midst of interaction something that helps them?
- if I can, what comes out would come from my embodied knowledge, ‘called forth’ in the interaction process by something in the relational field I’m a part of (see Maturana and Varela for more on ‘calling forth’)
- this calling forth would be an illustration of what Winter calls ‘improvisatory self-realisation’ where theoretical resources are not pre-defined but are drawn in (or in this case, out) by the process of inquiry (Winter, 1998)
- detailed attention and analysis of these interactions could allow me to capture and clarify what ‘roots’ or better still, embodied values were being expressed/created
- and these learnings could form the basis of a narrative of my own learning in inquiries of this kind, and demonstrate the living standards of judgement that I am creating to act as a basis for accounting for my claims to knowledge/influencing.
- In this process I will, following Lyotard, have been working without the rules (embodied values) in order to formulate the rules of what would have been done, with a central focus on helping clients learn to improve their practices

Looking at this logic flow now makes me feel more relaxed about ‘abandoning’ all my lovely theories/techniques in the service of client need and a much more democratic, educational interaction. What I need to do to increase this relaxation and pleasure will be to more fully embody the ideas and values inherent in the frameworks that fascinate me, like Foucault and Polanyi, so that like Gandhi I become the changes that I seek to offer others the benefits of in my chosen role of ‘carrying the word’. But in this instance I won’t be carrying the abstract word that is meant here, but providing an embodied version that addresses the meaning and valuing of local and tacit knowledge.

As I read this I still identify largely with what I wrote. What seems to have changed is my understanding of what ‘embodiment’ might mean – an oscillatory process that allows me to be resourceful in the moment – and a more spacious, creative, and conversational sense of what ‘creating-the-future-in-the-present’ could mean. My experience with the BBC managers and my clean language work have also increased my sense of confidence in the potential and worth of this approach and my relaxation and enjoyment in working this way.

Moving on....

So having now mapped out the main elements to do with purpose/identity that have become clearer since the Diploma transfer meeting, let me return to Judi’s feedback and what I’ve gleaned from it that speaks to my work this year. I think she made three main comments that have contributed to some of the changed thinking on my part, and in particular, what I should be focussing on in the MPhil phase of work:

- My intention in having access to a wide variety of sources e.g. systemic thinking, etc is presumably to come up with/enable others to come up with, more rounded *integrated understandings of particular situations*. If so, why do I persist in keeping these ‘sources’ separate in my writing about them in the

paper? When/where/how will the promised integrations come? Would a more narrative approach help here?

- And this points to experience as ‘storied’. So why do I so often start my argument in the paper with the propositions of others (see page 23 in diploma paper re the Lincoln and Guba article) and then pitch in to argue/differentiate/develop, rather than *starting with my own experiences*. Might my learning process be mirroring this way of thinking about content. If instead I focussed on my *practice*, how through reflection on my own experiences, might I generate more useful personal research ‘data’?
- So where exactly is my point of inquiry? I have a tendency to present things without ‘framing’ either prior to or after. Not framing things formally (or keeping the framing tacit) allows for emergence and creativity but also militates against learning – I’m not asking ‘just what is my purpose here.....and what have I learned about it?’ If I did, it might bring the ‘figure’ out from the ground. And further, despite my multi-faceted model of development (see appendix on ‘social architecture’ pp52-56) I seem pretty self-sufficient. So where are my *learning edges* and what *help* do I want from others?

What I have taken from this is the value of *articulating more clearly my learning edges and finding ways of working actively with them* during this next period. What might this involve?

In developing this paper and others I realise I’m using a version of a hermeneutic cycle (Judi recommended a book - *Mindful Inquiry* by Bentz and Shapiro, 1998, which I’ve found helpful). I tend not to know the ‘whole’ in an explicit way at the outset, so I go round and round in a cycle of induction, building up the argument from ideas/evidence that catch my interest. As a sense of the whole emerges from these cycles I get more ideas about the elements I want/need to include. And so the cycle goes until the whole emerges. I think this is perhaps what Judi is feeling for when she says my ‘process mirrors the content’....I’m keeping things separate initially so the whole/the new frame can emerge.

The challenge then is to learn from this process: in an incomplete ‘text’ like the diploma paper, what is the whole that is emerging is not yet distinct, and what are the leaning edges I need to inquire into e.g. what is holding back the fluent expression of my multi-vocality in mutual inquiry interactions? And a further challenge is, to generate such ‘texts’ that more clearly represent my own experience of my practice in addition to responses to the ideas and experiences of others.

So to take things forward, I’m planning to do a few things:

1. To re-read my diploma paper a number of times from a hermeneutic perspective to get an idea of the world - the ‘whole’ - implied beyond the words - the ‘elements’ of my paper - (Ricouer, 1981): *what is the tradition* I’m perpetuating/transforming through my acts of interpretation, and why am I seeking to do this?
2. To take a greater interest in my *attentional and intervention practices*, not just in work situations but in most situations (see Judi’s thoughts on living life as inquiry). My focus here will be on tracking my experience/interpretations in order to develop texts based on my own practices. (note: with my NATS proposal encouraged but on hold until the New Year, this is not just virtuous but a necessity unless I find another sponsor!). Here I plan also to look at the contribution that the ‘clean language and

metaphor' work I'm doing can make to refining my discriminatory abilities, continuing with my learning journal and transcribing any interactions that I can get on tape

3. To build more of a capability to become aware of, create, and communicate *integrated interpretations*, through exploring the *narrative form* in a more concentrated manner. How can I start linking in a more fluent way the insights I gain from the many 'sources' I have access to.....and which seem to sustain my interest in these different fields? If I can, it will be possible to test their usefulness to clients and the worth of striving for multi-vocality. Here I plan to use the critical fiction approach put forward by Winter to help with this development.

4. And finally, building on this last point, to explore further my ideas about *embodiment* as an *oscillatory process*. What is involved in being open to all my and others' sources in a living relational present, and how does the oscillatory process attend to what is emergent and timely in terms of creating embodied futures? I'm hoping to set up some experiments with the help of other members of the 'embodiment' inquiry group

Looking at this further *list* of actions, I'm reminded again of Judi's comments about the *form* I use to communicate with others, and Donna's crack about a smorgasbord...has anything shifted yet.....where is the more integrated personalised story about my practice? Looking forward to seeing you on Friday.

APPENDIX 11: Bath CARPP: MPhil Transfer Paper, September, 05

EXTRACT - How to improve my practice of leadership development?

This proposal describes research into ways of enhancing managers' capabilities to offer appropriate and effective leadership in their organisations, as they pursue an E Learning Coached MA in Leadership Studies at Exeter University, It will focus on exploring leadership as a 'process' phenomenon and seek to develop a 'relational epistemology' to help participants make sense of their lived experience through accessing marginalised knowledges. The research will engage critically with ideas coming from several fields including the systemic and social construction traditions, Foucault's work on power relations, complexity theory, and tacit knowledge. The research will also develop insights into pedagogy for the education of practitioner researchers in higher education by inquiring into relations between the macro 'conditions' which create contexts for learning and working, and the relational 'micro-practices' which help translate these into embodied practice.

I originally started my studies in January 2002 and successfully completed the Diploma Transfer process after a very enjoyable and stimulating 15 months, in April 2003. In September that year I decided I would benefit from a break in my studies due to several complicating factors which were disrupting my concentration and focus – care for my ailing mother in South Africa, a house sale and re-location to Oxford, supporting a daughter who was suffering from severe depression, and establishing a suitable work platform from which to operate. I subsequently got permission to withdraw for a year, and during that period very fortunately resolved or had resolved for me, the several complications referred to earlier. I therefore felt able to re-register in October, 2004, and since then have been actively thinking about and preparing my arguments for the 'rapids' of the Masters Transfer process which I hope to successfully negotiate before the start of the new academic year in October this year.

This paper is the result of my reflections over this period and the further experiences I've had as a consulting fellow at Exeter University Centre for Leadership Studies since March 2004: principally during two substantial consulting assignments with Exeter University and then the Royal Mail Group; and in my role as a coach over the past 9 months on the E Learning Coached MA in Leadership Studies. Though both consulting assignments have turned out to be unsuccessful from my point of view, they have been very rich learning experiences, while the more successful ongoing academic work with six mature MA students and colleagues at the Centre for Leadership Studies, has provided an energising and intellectually stimulating contrast to the more pragmatic requirements of work in the commercial environment. So despite a lack of formal supervision and challenge from co-researchers since September, 2003, I believe I have managed to continue making good progress with my inquiry. I hope to demonstrate this progress in this document, and in the attached paper delivered at Exeter's Leadership Refrains Conference last November, which was the focus of the first discussion with Jack Whitehead. I further hope these will justify Jack's comment made at the end of this meeting, when he jokingly remarked: '.....supervision – who needs it!'

Over the next few pages I draw out what has been emerging since my last formal piece of writing for CARPP on July 4, 2003. This will cover how I'm now framing the

purpose of the research and the many ideas and interests that have been attached to the project like barnacles to a boat – or as Donna Ladkin remarked at the Diploma transfer discussion, ‘like a smorgasbord’ - and how I intend to approach and carry out the next phase of work.

Focusing on ‘leading’ – approaching leadership practice ‘as an art’

Though in a proposal made to NATS during the early stages of the Diploma, I did imply that my research would be focused on how I could help managers improve their leadership, my general approach during the Diploma stage does in retrospect look quite open ended – as though I was preparing myself to study anything. I think this was what Judi Marshall was pointing to when she remarked during our discussion in Bristol in June, 2003, that my research questions were mainly about the ‘how’, and therefore asked what my *inquiry* was about. There is the supportive point made by Dadds and Hart (2001) about the importance that practitioner researchers place on developing a unique methodology for their work, but on reflection I think Judi and others were right: I didn’t have a *particular* ‘content’ focus and probably with my MBTI ‘perceiving’ preference, didn’t want to close down my options – and so I was content to focus mainly on the methodology issues. Although I’ve almost always been involved in one way or another with leadership development work of one kind or another, I’ve known for some time that I generally resist being tied down to just a focus on the individual managers. Instead I’ve talked much about the importance of ‘context’, how ‘management’ development must become ‘organisation’ development if it is to work, and so on, always seeing the work with managers as an important lead into the organisation and culture change work that I believe is so important.

Then in March, 2004 I was appointed a consulting fellow at Exeter Centre for Leadership Studies and in addition to starting to work on some leadership-focused consulting assignments, got interested in and involved with the MA in Leadership Studies that the Centre offers. Being one of the very few academic centres specialising in leadership, the focus at Exeter is, and obviously has to be, more on the leadership development strand, and the research, teaching, and consulting consequently focuses particularly on this theme. Wanting to establish myself in this new domain, I rapidly became immersed in reading academic papers, teaching and coaching work with mature MA students, working with clients on consulting assignments, discussions with academic and consulting colleagues, and taking part in academic conferences - all with a focus on *leadership*. And so it began to dawn on me that despite my long held interest in the wider aspects of organisation behaviour, I had quite fortuitously located myself in an institution that offered a particularly rich context in which to pursue inquiry into one crucial element of that complex domain – that of leaders and leadership - and the questions about what it is, how it’s done, how to develop it, and so on. These now constitute a high profile and hotly contested area of research, and so I began to think maybe this could become the main ‘content’ focus of my inquiry – but given my trajectory of interests, what in particular might I look at?

An academic colleague Peter Case who had re-designed the Exeter MA for the e learning version of the MA in Leadership Studies, introduced me to the work of Keith Grint and I started reading one of his recent books called *The Arts of Leadership* (Grint, 2000). What I particularly liked about his treatment of the subject was the notion that successful leaders depend far more on their followers than is usually understood: ‘...what distinguishes a successful leader from a failed leader is whether the subordinates can and will save the organisation from the mistakes of its leaders’ (Grint, 2000, p 419); and that leadership is ‘an indeterminate skill that masquerades as a

determinate skill' (ibid, p 419) and is much more to do with the skillful application of a number of 'arts' rather than as a mainly technical achievement:

'...leadership might best be considered as an art rather than as a science, or more specifically, an ensemble of arts...to do with identity, the formulation of a strategic vision, the construction of organisational tactics, and the deployment of persuasive means to ensure followers actually follow.' (Grint, 2000)

In contrast to my usual preference for looking to contextual interpretations of events, this caused me to reflect on the very personal and unique nature of the artistic process. Following Foucault and others, we might be creatures of discourse; but when it comes to actually producing art there does seem to be something intensely private and personal that's at work. And leading others effectively along difficult paths, as Heifetz (2002) analyses so eloquently, does involve risk and putting yourself 'on the line' in a personal way – otherwise people are unlikely to follow you. So I thought perhaps I needed to be a little less closed to insights from the 'individual as centre of the world' perspective. If leadership is better seen as an art then there certainly is something important to be learned through this lens.

The next important step on the road came when I started working with the Centre's Director, Jonathan Gosling last May on a leadership development proposal for the Royal Mail Group. What struck me during the early stages of our discussions with the client was the lack of specificity in the request. In contrast to the usual 'this is what we want and how we want it', the two client representatives seemed not to know quite what the new deregulation challenge for Royal Mail implied, what qualities their leaders subsequently needed, or how these new attributes might be developed! As I put it in the paper to the Leadership Refrains Conference last December:

'...we and all those associated with the enterprise would have to adopt an *emergent* approach if the programme were to help deliver this capability in the face of a largely unknown and uncertain future, in terms of: the *content* of the programme – what kind of leadership?; the *processes* used – how to develop this?; and the *framing context* – leading to do what (vision/strategy)? (Kinsella, 2004)

What this encouraged me/us to do was to take up a far more open perspective on what we might be up to: if nothing was seen as fixed and we had to keep all three variables in play, we not only could but had to pay particular attention to the nature of the boundaries around each and the *interactions* between them. Almost immediately I began to feel that the boundaries or 'punctuations' around these three 'activity systems' - which I've long thought were rather arbitrary e.g. 'this' is 'leadership' and 'that' is 'development' – could be treated in a more flexible way. In other words instead of being the expert developers who delivered a brand of 'universal' good practice, we could instead frame the programme as a *joint* exploration with delegates of what kind of local leadership might be appropriate as the strategic circumstances changed, and what particular development processes seemed to work.

As no one seemed to be clear quite what we might end up with, and bearing in mind Grint's metaphor of leadership as an art, I decided to frame the work at one level as investigations into two interacting processes - 'leading' i.e. the what and how of leadership, and 'developing leading' i.e. the what and how of managers learning how to enact appropriate and timely leading in their local contexts. Following Bergson (1911, p

11 in Wood, 2005) I decided to use verbs rather than nouns to emphasise movement and process. We accordingly invited participants on the programme – which interestingly we’d decided to call ‘A Difference’! – to join us in an exploration of improving on-the-job performance with conventional academic inputs very much bringing up the rear is a supportive role. But how to do this.....?

Using a ‘process-as-ontology’ perspective – interpreting ‘fleeting moments’

As referred to earlier, in my conference paper I mentioned that we hoped to ‘...enable them (*the participants*) to offer leadership in a more involving and de-centred style, where leading becomes more a function and expression of a network of relationships (Gergen, 1999) and less that of actions of *the leader*.’ (ibid p 6) Further, in contrast to more conventional approaches where capability is seen as something ‘out there’ and something to learn to do, we were being more ambitious and were ‘hoping participants might move more towards qualities/performances that *they were a part of* i.e. constituted by the relations they were in. This represents a more extreme form of relatedness or ‘becoming’ and pointing towards what Martin Wood has referred to as the ‘excluded middle’ (2005), and what we were calling a more de-centred form of leading’ (ibid, p 5). A key paragraph in my paper - responding to pressure from the client for a more straight-forward approach to the programme - points to this shift in my thinking:

‘However, if we are to gain real insights into leading ‘as an art’, and how to develop it, there is a need to keep the less punctuated ‘process’ view of leading as a possibility in our own ecology of ideas. If we can do this it will help us keep our frame/canvas wide and our brushes and palette of colours rich and sensitive enough to capture imprints of whatever might emerge as we work together. If then as Wood (ibid) remarks, we think of leading as something that appears only in ‘the most fleeting moments’ against ‘a background of complex dynamic relations’, what can we help set up with other members of the development network to make this more possible? (ibid, p 14)

During this period I realised that one thing the RMG opportunity was doing was allowing me to be more open, at least with Jonathan Gosling, about my interest in exploring a more relational view of human behaviour, moving from a first transition where the freestanding individual is still predominant but where communications between individuals are seen as being circular in nature – NLP’s ‘the meaning of a communication is the response it generates’ (O’Connor et al, 1994); to a second transition where the concreteness of this freestanding individual begins to disappear, to be seen essentially as being at the vortex of a long history of many past and current relationships (Gergen, 1999). This also has echoes of a conversation with Jack Whitehead about Alan Rayner’s work on inclusionality (2004), where his use of terms such as the ‘complex local self’ and ‘relationally dynamic awareness’ also point towards a more relational ontology.

However it was reading a late draft paper by Martin Wood, a colleague at Exeter, about the ‘fallacy of misplaced leadership’ (Wood, 2005) that nudged me to a third transition where he talks of ‘the excluded middle’ and where, in this instance, the studying of leadership needs to be about capturing and understanding events which presuppose relations, connections, reciprocities over time...and how these become associated with background processes of individuation (ibid, p 16). Here the concrete individual disappears as the focus turns to the relations themselves – the excluded middles – and

where everything is seen as part of process. The following quote from Wood on Bergson's view captures this new 'process metaphysics' perspective well. Referring to Bergson's starting point to do with process-as-ontology, he says 'His focus is on the emergence of enduring patterns having to be seized from the original flow of process and not on the fallacy of misplaced concreteness' (ibid, p12). These are the 'fleeting moments' (Widder, 2002, p 59 quoted in Wood, ibid) which occur against a background of complex dynamic relations.

But my work with the MA students was also influencing my thinking. During Phase 2 of the programme we studied a wide range of conventional approaches to leadership like 'trait', 'situational', 'transformational' etc. Included in this survey was a new term for me called 'distributed leadership' which a commentator like Gron (2002) describes as: 'relations of "reciprocal influence"' and where he sees 'distributed leadership as "concertive action" extending the existing unit of analysis to include leadership as joint action, rather than simply aggregated or individual acts' (quoted in Wood, ibid, p 7). There is also the survey by Bennett et al for the National College for School Leadership (2003) which states that 'the concept of distributed leadership is in its infancy' (p. 11) and identifies the challenges of 'undertaking research into it as an emergent property of interacting individuals and gaining insight into the dynamics which operate between or 'stretching across' individuals. Innovative ways of doing this or applying it to leadership studies...are likely to be fruitful'. (p. 13)

I was also getting interested in exploring views of leadership which recognise and challenge the associations triggered by history e.g. Lipman-Blumen (1992) and where basic definitions might be more sensitive to what is actually happening in the present. For instance, as Alvesson and Deetz suggest (ibid, p 130), we could use 'connective organising processes' and 'connection initiators' rather than the usual 'leaders' with all its male gender connotations. These rang bells for me as I'd long held the view that the few high profile acts of designated leaders were always just the tip of the iceberg when it came to the everyday leadership of change in large organisations – and that by focusing just on the top few we were ignoring the reality of what goes on (echoes of Grint's views on the importance of followers here too, and his concept of 'mobilisation'). This seems especially so with the rise of knowledge workers, the increase in market dynamism demanding intelligent responses at the frontline, and the continuing demand for increased democratisation in the workplace. But these are 'shoulds' and my intuition was and is more about the 'is-ness' of leadership being much more dispersed and emergent in nature than conventionally claimed.

All of these factors were prodding me towards a different view of 'leading' and daring me to adopt a more adventurous frame for the work with RMG. The Leadership Refrains paper (ibid) elaborates on how this experiment developed and some of the difficulties I experienced in trying to use what is currently an esoteric perspective in a business completely driven by the everyday '24/7/365' routine of meeting targets and cutting costs. However I had been 'infected' and writing the paper further exposed my 'hand' both to myself and others. This exposure has encouraged me to go further down this line of thought and I'm now sufficiently persuaded that this will provide an appropriate and flexible overall frame to guide my research. Of course I'm only too aware of the challenge I face: is it possible to entertain a notion of diffused, dispersed, and distributed leading implied by the process perspective, while engaging and working effectively with individuals who are called leaders and who wish to develop their own skills? This research will explore what is possible. However I do believe it meets what Judi Marshall was referring to when, in commenting on my desired multi-modal

approach to research in her notes on my Diploma paper, she wrote ‘need to nest “it” within some more encompassing frame/being/set of practices’ (private communication, 2003)

Towards multi-modal forms of knowing-developing a ‘relational epistemology’

So now to the ‘it’ that Judi was referring to – the range of perspectives (or to use in a different sense now the Batesonian phrase, an ‘ecology of ideas’) that I talked enthusiastically about in the Diploma paper and which in Judi’s words ‘offer exciting “integrations”’. Just to briefly refresh my/our memory of what these were, here are elements grouped into three strands:

Social construction/power relations: the argument that meaning and identity are largely constituted by how we use language in networks conditioned by power/knowledge relations, and how through problematising dominant discourses and institutions and seeking to re-value experiences which have been marginalised, we can encourage new ways of relating, talking, and behaving (e.g. Gergen, Foucault, Elias, etc)

Tacit knowledge/embodiment/metaphor (cognitive science): the notion that mind is embodied, thought largely unconscious, and abstract concepts mostly metaphorical, and how through better access to these processes and levels of experience, we can increase our insight into how and why things are the way they are, and improve the quality of our everyday practices (e.g. Polanyi, Lakoff and Johnson, Burkitt, Belenky et al, etc)

Complexity theory/systemicity/process(emergence): the proposition that these ideas and associated human behaviours can usefully be seen as embedded in complex responsive processes which though non-linear in nature, offer the potential for thinking and working in more fluid, flexible, non-hierarchical, conversational, and innovative ways (e.g. Stacey, Shaw, Rayner, Bergson, etc)

When I spoke to Jack Whitehead about ‘next steps’ in November, one of the things I did raise with him was the critique of the possibly dilettante-like nature of this ‘smorgasbord’ of perspectives that I was interested in. Encouragingly he spoke of ‘ideas that are resonating’ and ‘a narrative that is emerging’ where my multi-modal approach could help others voice their own stories, perhaps bringing to life things that are not part of dominant narratives. I liked the metaphor of resonance and it reminded me that perhaps I was now less driven by in the idea of ‘integration’ and the development of a new ‘approach’. Perhaps I’m now more interested in the insights each perspective can offer and how these might resonate with each other at a tacit level bringing new insights if not integrations - that in addition to insights from each it will also be possible to generate further insights ‘between’. As Alvesson and Deetz put it ‘...work with unresolved tensions within a text where one follows different themes of...without attempting synthesis.’ And further ‘...allow space for various discrete voices in texts through organising these around conversations between various theoretical perspectives or interest groups...’ (2000, p 109) In other words I think I’m now more interested in understanding the *relatedness* of these varied perspectives, how I might deal with their differences and tensions, and how this might contribute towards a ‘relational epistemology’ that I referred to in my original candidature statement. (see revised version at end of this proposal)

The last part of Jack's comment in the paragraph above – the 'bringing to life things' bit - also reminded me of my abiding interest in one of these 'modes', that of *tacit knowledge*; and the notion that there are all kinds of experiences existing at a tacit level within the spaces not touched by power relations/dominant discourses. For instance the work done on on 'women's ways of knowing' (e.g. Burkitt, 1999, Chapter 5, and Belenky in Hartog, 2004, Chapter 3) demonstrate the kinds of knowledges that can lie hidden beneath the surface of everyday commonsensical views. So at a deeper level there are potentially all kinds of varied but unvalued experiences that with alternative story frames to give them shape and purpose, could offer important insights into e.g. (and bringing things right up to date) - what 'really' happens when leading is regarded as a process – the new focal point of my research. Following Alvesson and Deetz (2001, p 139-140) my aim would be to help bring forward the 'progressive development of distinctions...and alternative conceptions', through a process of insight, critique and transformative re-definition of these 'marginalised' experiences and phenomena – 'what is seen as natural, self-evident, unproblematic, and unavoidable' (ibid, p 147). I would be hoping in this participative process to problematise rather than confirm and reproduce the views of dominant institutions and discourses.

The overall metaphor that is now guiding my thinking is circular, and is that of the *spiral*. What I see happening as I use these different perspectives is like a 'triple hermeneutic' process (Alvesson and Skoldberg, 2000). In this I may typically start from a position of commonsense appreciation in observing/dialoguing/making sense, but then in response to the interaction, I may 'submerge' myself beneath the surface and go through a varying and dynamic sequence of more particular and specialised views/interpretations of the process/event. By going through a spiral I'm able to 'resurface' at the same but now subtly different point of observation with a more enriched/varied/questioning quality of understanding. And from this I can question my own and others' understandings and actions with a view to helping contribute towards a reframing and revaluing of what is emerging.

No doubt much of this 'spiralling' is likely to take place as reflecting on events *after* the fact. But I'm hoping I will steadily be able to do this more and more in the present moment – what Stacey (2003) and colleagues refer to as 'in the living present' – and thus be able to make the timely interventions that both Torbert (2004) and Scharmer (2000) speak of in their different formulations of what it is to be 'strategic' and able to 'presence' i.e. embody emergent futures. If I'm able to model this behaviour myself I'm hoping others may become interested in developing the identities and embodied skills that are involved in this *relational* mode of knowing and the associated *process* mode of being.

APPENDIX 12: Bath CARPP: Note – ‘seeking roots in the future’ and ontology, April 06

EXTRACT - Ontology, Epistemology, and Methodology: Reflections While Travelling On The M5

In trying to capture my continual search for new ideas that might provide insight into human behaviour in organisations, I came up with the metaphor ‘searching for roots in the future’ (Diploma Paper, March, 2003). This came to me in 2002 on one of my many drives along the M4 from Bath to Oxford. The reflections that now follow came to me while driving up the M5 from Exeter to Oxford last week. Clearly there is some kind of connection between my ‘roots’ and the ‘routes’ I travel along while pursuing my physical and learning journeys! The notes try and capture the ideas that came to me over a period of half an hour or so (they were voiced into a digital tape recorder) as one idea followed another in a very good illustration of the reflective process and what it/I can achieve in quite a short space of time.

As mentioned, the original notion of a ‘search for roots in the future’ came while driving. As I was mulling over the earlier CARPP discussion, this set of words just suddenly came to mind, as a way of understanding what I’ve been trying to do (or be) all these years. Though this seemed a little strange at the time, I later reflected that:

‘... over the years one of my central yearnings has been to find (or now I’d rather say, shape) a more integrated, authentic, connected, and rooted me. And so perhaps this unceasing search of mine throughout my adult career since leaving South Africa, for new ideas over a very wide and diverse range of topics/themes could be seen in this light – not just a search for better methods of consulting/coaching etc as I’d thought, but more importantly, a search for roots, for a ‘me’ that would feel grounded, confident, and ‘at home’.’ (Diploma paper, 2003)

Some time later (digital tape note in late 2005) I started to think about this ‘search’ metaphor as less about ‘roots’ and more about ‘rooting’, indicating the shift from a static discrete noun to a more dynamic process verb. This new framing brought home to me the active responsibility I had in this process – rather than stumbling across sundry ‘roots’ in my work with others, after the fact, I felt I was more involved in a process of actively trying to create/establish roots as I talked with clients or students. (question: what kind of ‘roots’ might I be talking about here - perhaps something to do with becoming someone who ‘creates a culture of inquiry’ and/or ‘enlivens the discourse’?)

What follows extends this thinking and brings in far more clearly the *relational* aspects of ontology and epistemology that I’ve talked about in the past - but perhaps did not really fully grasp what I was meaning - and some initial thoughts about an appropriate methodology. (Note to KK: these notes need to be read and then integrated with the ideas in the last section of my MPhil Transfer Paper which appears as Appendix 1, as they are an attempt to further operationalise the methodology)

1. Using the ‘presencing’ concept (Scharmann, 2003) my ‘search for roots in the future’ can be reframed as a more intentional and active ‘rooting in the present’. This is a search for roots but in the present discussion or situation, and – taking the presencing ‘move’ - in ways that already embody those ‘roots in the future’. This reframing right

away provides a much more immediate sense to the process and brings to the fore the active and timely (Torbert, 2003) nature of this process i.e. **something that I can work with and influence in the moment rather than just reflect on after the fact.** This is very much the sort of stance that Patricia Shaw talks about in her book on complexity (Changing Conversations in Organisations)

2. This makes me think of the ‘process’ approach to understanding ‘leading’ that is a central part of my inquiry e.g. leading as consisting of ‘fleeting moments that emerge from a complex background process’ (Wood, 2005). In particular it leads me to the process idea of ‘becoming’ rather than ‘being’ – so my search for roots in the future segues into a rooting in the present - which can be framed as a search for identity with ‘roots’ acting as a proxy for identity. So in effect as I’m working, I’m searching for my identity in the present moment, using a process of ‘becoming’. This moves the level of attention from behaviour right up to questions of purpose and identity – finding out/creating who I am as I help others (and this brings in the issue of personal ethics – what are the values I’m living?) **Note added April, 10: remember Alan Rayner’s recent warning about the risk of talking as though there was a ‘gap’ between *becoming* and *being*!**

3. And this ‘becoming’ is not an individual process. The search is in interaction/conversation with others in coaching/facilitating processes where I’m seeking to help the other(s) improve their practice of learning about leadership. This searching for identity is taking place *in relationship* and so my ‘becoming’ is a *becoming in relationship* and thus qualifies as a ‘relational ontology’ that I seek to understand in relational terms i.e. within a ‘relational epistemology’.

4. My epistemology embraces the idea of there being many ways of knowing. As a way of trying myself to understand situations/interactions from many potential vantage points I have resorted over the years to a number of high level ‘philosophic’ perspectives like systemic thinking, social constructionism, power relations, complexity theory and so on. Through using one or more of these at any time I’ve created a way of knowing a particular interaction/event etc, and have used this/these to help clients think differently themselves about something (usually without labelling ‘it’). Since those days I’ve come across other ways of knowing e.g. ‘womens’ ways of knowing’ (Belenky, 2003) and have begun to realise that this notion of ‘ways’ can be used at a much more micro level in the sense of e.g. a way of knowing in a particular relationship. So from this perspective I can reframe what I’m doing with e.g. systemic thinking, not only as looking from a high level philosophical perspective but also from within one particular relationship. In this sense, what I’m doing when I use say, social constructionist thinking *is* this, but it also is about helping the other discover/create their very own ‘way of knowing’. (I seem to have moved a long way from the previous perhaps rather high level understanding of this idea!). This seems to link quite closely with the idea of a ‘pedagogy of the unique’ (Farren, M, 2005) and of course Bernstein’s ‘pedagogy of the personal’.

5. How might I support this framing with a methodology that is also ‘relational’? I have a few ideas which need further thought but here they are in crude form:

- In Clean Language and Metaphor (see Appendix 2), an NLP influenced way of doing therapy with clients, the basic process involves a neutral ‘mirroring’ back of what the client is saying, using their exact words and metaphors, and relying on a series of neutral or ‘clean’ questions to carry the client forward in their own

language/symbols in understanding their ‘metaphor landscape’ (Lawley and Tompkins, 2003). So the coach is in effect acting as a sensitive, intelligent but ‘clean’ cybernetic feedback loop, introducing only the slightest of additional information in the form of a clean question or request for more specificity*. The usual focus is psychological and very much on the individual client and how they think about themselves/their context. However, I can see how this might be framed more *relationally* in terms of how they are relating to themselves/others by paying particular attention to metaphors of relationship, receptiveness/responsiveness, and influence, as well as ontology and epistemology.

- I notice that one way in which Jack Whitehead relates to me when responding to my papers, is to feed back (or mirror) particular sentences/ideas directly *in the words I use*, and ask further questions about influencing claims/evidence procedures, and so on. In this way he seems to me to be using a process which definitely bears a strong family resemblance to the Clean Language process
- To this basic cycle of feeding back and questioning, I see how I try and bring my ‘pedagogic icon’ i.e. the two level interactive process of ‘framing/practicing’, to offer clients/students a hermeneutic inquiry process - from part to whole, from practice to framing, and vice versa (this reminds me of Judi Marshall’s ‘inner and outer arcs’ of attention – is it the same or different in kind?). This process enacts a form of double loop learning along the lines of the Argyris model (Argyris, ??; but see also Torbert and Rowan for more on extended epistemologies). As part of this responding in the moment, I use my own interest in and tacit knowledge of multiple ways of knowing, to help students/clients find novel ways of framing and experiencing the situations and challenges they face, and developing their powers of discrimination. By modelling these multiple ways of knowing I’m hoping to encourage them to do something similar and so find their own ways of knowing as I find mine. Together i.e. relationally, we help each other develop a unique understanding of an event which is both joint and individual. (one way of talking about this process might be to borrow Judi Marshall’s ‘byline’ and talk about ‘living life as pedagogy’!)

Within this kind of relational perspective (the framing level), it seems to me that my interactive process with students/clients could be shaped and refined (the micropractices level) to develop and enact with others the type of ontology and epistemology mentioned in points 3 and 4 above.

6. What about the link between my pedagogy and the ‘leading as process’ focus of my students? One of my uncertainties has been how I might help students use a ‘process’ approach to understand ‘leading’ in new and more effective ways. Thinking about the ideas presented in point 4 above, it seems to me that what we’ll be doing ‘in the moment’ during our learning interactions (the pedagogic ‘domain’), will be the developing and modelling of the ‘means’ that students require to use a ‘process’ perspective in their inquiry into leading (leading as process ‘domain’). So we will be working out together i.e. relationally in what I’ve called elsewhere a ‘side by side’ process, a methodology that will help them with this task. The feedback between the two domains of ‘learning’ and ‘practice’ should also serve to gradually refine both of these processes, and improve our joint abilities to receive and respond in relation to our clients’/stakeholders’ needs.

7. Acting as an overarching frame for all of this work, I’ve developed a map of the multiple interactions that constitute what I’m calling the learning ‘chain of influence’

(see diagram 1 – to be provided in due course!). This shows the flow of communications/dialogue that passes from the ‘supervision’ node on the left hand side (JW) to the ‘coach’ node (KK) to the ‘leader’ node (students), and then to the ‘followers’ node (staff/workers) on the right hand side. The diagram identifies the information flows that are required to provide evidence for claims about influence. For example it shows how I need to get feedback from my student leader’s interactions with their followers if I’m to evaluate what influence I’m having on their behaviour in context. Taking Colleen as an example (more here.....) It also identifies the possibility of capturing particular ‘flows’ of influence where an idea may be passed from one node (say supervisor) to another (the coach) and another (the leader) and then back again, thus demonstrating the circular influencing process involved in a community of inquiry (Wenger, ??).

My sense is that it may be possible to map in detail the ‘framing/micropractices’ for this two way chain of influence, and provide examples of these in practice in each of the interactions in the chain. This would demonstrate in rich detail the *ways of knowing* involved in a mutual influencing process that embodies an effective *pedagogy* for practitioners (say more about what’s special about this group....) in HE (say more about what’s special about this context....e.g. Ronald Barnett), as they seek to improve their practice of *leading* – the three main areas of inquiry in my PhD. It would also cast new light on the advantages of using a relational epistemology to create a more responsive and inquiring context which encourages students to create their own living theories of leading through embodying and reflecting on their own standards of judgement in their practices (Lyotard, ??)

APPENDIX 13: Chapter 3, Campbell and Huffington, 2009. *Organisations Connected* (1st draft in March, 2007)

EXTRACT - Leadership Development and Close Learning - Reducing the 'Transfer Gap'

The particular issue I want to explore here is the so-called 'transfer' problem that besets much development work: how to help people transfer what they've learned in a development or training context, to their own role and work situation, in an effective and personally authentic way? One of the factors that now further complicates this issue is that managers in our now slimmed down organisations, appear to have less and less time to engage in developmental activities per se. They apparently must get it 'on the run' so to speak, by taking part in flexible distance learning type programmes, or in short, sharp, offsite 'bites' squeezed within busy schedules.

What I offer here is an account of 'work in progress' in the narrative of my learning concerned with the question: 'how can I improve my practice?' (Whitehead et al, 2006) in this area. As a facilitator of individual/group development in both academic and executive settings, the particular idea I've been exploring for the past few years, and want to make the central focus of this chapter, is that of *close learning*¹: how to create and support learning opportunities that are 'close'ⁱ to the context of performance, thus reducing learning transfer by bringing into focus the relational and contextual implications of personal and organisational development, as well as the cognitive and behavioural. Here I offer some reflections on my experience of early steps in developing a methodology for improving my practice embodying close learning ideas: initially in an academic setting, coaching on the e learning MA in Leadership Studies at the Centre for Leadership Studies at Exeter; and then in a work setting, facilitating development work with a 'local strategic partnership' (LSP) based in southern England. Due to reasons of chapter length I focus particularly on the latter.

Seeking 'roots' - *learning many ways of knowing*

But before I look at the idea of close learning, what is my starting point with 'systemic thinking'? Since the mid 70's I seem to have spent a huge amount of time exploring the 'why/what/how' of effective learning/development for managers in organisations. For a time during the late 90's I thought I was getting quite close with a particular form of action inquiry using systemic and social constructionist ideas associated with the family therapy tradition: managers seemed to get a lot of learning from intense colleague 'inquisitions and gossipings' which they seemed able to embody, try out, and adapt in the light of feedback. A decade later, in trying to capture this continual search for new ideas that might provide insight into human behaviour in organisations, I came up with the metaphor 'searching for roots in the future'. Though this seemed a little strange at the time, I later reflected that:

... over the years one of my central yearnings has been to find (or now I'd rather say, shape with others) a more integrated, authentic, connected, and rooted 'me'. And so perhaps this unceasing search of mine throughout my adult career since leaving South Africa, for new ideas over a very wide and diverse range of topics could be seen in this light – not just a search for better methods of consulting/coaching as I'd thought, but more importantly, a search for roots, for a 'me' that would feel grounded, confident, and 'at home' (Kinsella, 2003)

More recently, I've started to think about this 'search' metaphor as less about 'roots' and more about 'rooting', indicating the shift from a static discrete noun to a more dynamic process verb. This new framing brought home to me the active responsibility I have in this process. Rather than stumbling across sundry 'roots' in my work with others (often after the fact), I felt I was involved more in a process of actively trying to create/establish roots as I talked with clients or students, perhaps to do with becoming someone who is 'convivial', 'responsive and invitational', 'creates a culture of inquiry' and 'enlivens the discourse'. And, as this searching for identity is taking place in relationship, my 'becoming' is a *becoming in relationship*, that I seek to understand in relational terms.

Given the many 'roots' that have shaped this epistemology, I have over the years embraced the notion of there being *many ways of knowing*. As a way of trying myself to understand interactions from many vantage points I have resorted to a number of high level perspectives like systemic thinking (Keeney, 1983), social constructionism (Gergen, 1999), power relations (Foucault, 1980), complexity theory (Stacey, 2003) and so on. Through using one or more of these at any time I've been able to some extent to loosen the grip of common sense ways of looking at things and find novel ways of knowing a particular interaction. And I've been able to share these perceptions with colleagues and clients to think differently themselves about something (usually without labelling whatever the 'it' was for me).

I now look at this loose ecology of ideas as a 'systemic mindset' which I and others can use to 'fuzzy up' our first automatic punctuations of a situation, and assess just how robust our initial perceptions are in the glare of the multiple lights offered by the mindset. I now see this not just as set of tools but as a stimulus for using higher level tacit processes in a creative way. Here is one possible flow of the elements in this mindset:

- Starting position: *as objective observer* - 'that's the problem/truth/facts!'
- First move – *into double loop learning*: 'what I see (that's the problem etc) is part of the problem (Keeney, op cit)
- Second move – *into narrative*: 'what I tell myself I see, isn't it – it's a story about it that gives it meaning (Gabriel, 2000)
- Third move – *into social construction*: not only is it a story, it's storying constructed in language with others, where words get their meaning from use within 'language games' (Wittgenstein in Gergen, op cit)
- Fourth move – *into power relations*: these constructions are legitimated/given truth value within asymmetric relations constituted by dominant narratives that embody power relations and legitimate certain views over others (Foucault, op cit)
- Fifth move – *into tacit knowledge*: these legitimated narratives are constructed largely through embodied, tacit and metaphoric 'thinking/doing' processes which to a significant extent are hidden from consciousness (Lakoff and Johnson, 1999)
- Sixth move – *into complexity*: these unconscious thinking/doing processes have the characteristics of complexity with non-linear causation and emergence (Stacey, op cit) which allow the possibility of creating possible futures in the present (or 'presencing', Scharmer, 2006)
- Seventh move – *into process metaphysics*: constructing possible futures involves me/us in making 'arbitrary' punctuations on the basis of 'fleeting moments'

within a complex background process (Wood, 2005) e.g. ‘that is the problem/truth/facts’!

(Note added April, 10, 2010: and now too, an eighth move - *inclusionality* where we move from a connectionist view to one emphasizing flow-form, presence, and continuity! Can I find a way of linking these last three ‘moves’ together in some way?)

And so we’re back to point 1 – but we’ve moved some way from the ‘that’s the problem’ of step 1! And in making these ‘perceptual moves’ we have established many inter-linkages between them. They are no longer isolated sequential ‘things’ but part of an ecology of ideas which I’ve grown to think of as ‘multiple ways of knowing’ or a ‘systemic mindset’.

More recently, I’ve come across other ways of knowing e.g. ‘womens’ ways of knowing’ (Belenky, 2003) and have begun to realise that this notion of ‘ways’ can be used at a much more micro level in the sense of, a way of knowing in a particular relationship. So from this perspective I can reframe what I’m doing with e.g. ‘systemic thinking’, not only as looking from a high level perspective but also from within one particular relationship. What I’m doing then when I use say, social constructionist thinking, *is* this, but it also is about helping the other discover/create their very *own* way of knowing. This seems to link quite closely with the idea of a ‘pedagogy of the personal’ (Bernstein, 2000) which is the subject of the first of the two cases I explore later.

Coaching ‘side by side’ - towards a ‘pedagogy of the personal’

The first area of inquiry into ‘close learning’ has been my work over the past three years with mature students doing the Coached E Learning MA in Leadership Studies. On the face of it, this MA is a conventional distance learning product with a defined ‘body of knowledge’, and wide range of readings, exercises, and required learning log entries. These are phased over an 18 month period, and followed by a 6 month dissertation. The MA exists ‘free standing’ before students begin, and is not substantially altered throughout the two years whatever might develop and emerge within a particular cohort of students. So in this sense the learning process appears to be very much the conventional teaching one of being fed ‘universal’ knowledge in a manner that might match the learning needs of a *typical* student.

The current pedagogy therefore, seems to be very much a ‘blended learning’ offer: a mixture of ‘tutoring’ (focussing on mainstream theories and frameworks) and ‘coaching’ (encouraging some thinking about application of this knowledge to one’s own role and context). This is done through the media of weekly e mail interchanges in relation to set questions about the syllabus, written comments on assessed essays each term, and a student-led web based discussion forum. This ‘arms length’ coaching relationship is leavened with some telephone conversations, and termly one day workshops, which provide opportunities for some face to face relationship building for those within the cohort who are able to attend. **Obvious problems to struggle with here include asymmetric power relations between the university and mature students (the university ‘knows’/the students don’t), dynamising and personalising the learning materials to suit a wide range of participants (creating a ‘personal’ MA), and encouraging students to apply ideas, and learn from applying these, in their work roles (tackling the ‘transfer’ problem identified earlier)**

Contrary to early expectations, my experience of working with such student-practitioners over the past 3 years suggests that the programme is not working in a

conventional ‘pipeline’ manner with students being fed chunks of knowledge in a digestible way. An internal study (Ladkin et al, 2006) has generated some encouraging evidence that the academic staff/coaches and students have to some extent been able to jointly construct a pedagogic process that has to a certain degree ‘levelled’ the knowledge-generating playing field. The sense is that we’ve been able to engender at least the initiating conditions for a ‘culture of inquiry’. Within this it seems that students and staff have been enabled to penetrate beneath the veil of mainstream academic thinking about leadership, and start working towards what might constitute a ‘distinctive’ pedagogy for the higher education of practising professionals.

The content offered is very broad and varied and offers a range of approaches to leadership rather than a preferred way i.e. no Exeter ‘line’ is being ‘peddled’. Over time students find they have to identify their own personal threads, and are more able to ‘tell my own story’, and ‘put my own stamp on things’. Students report, as Keith Grint confesses in his *Arts of Leadership* (2001), that they get more confused as they go along and they realise there isn’t *an* answer - they need to find their own personal path to authentic leadership - ‘it’s up to us to find out’.

While this programme structure, content, and rhythm clearly does influence the learning context, it is the contribution of the coach-student relationship that seems to make the most significant difference. Throughout the 18 months, online coaches provide ‘formative feedback’ on all written work, both logs and essays. This, together with occasional telephone calls/face to face meetings, seems to both shape, extend, and tailor the learning experience in crucial ways. The written work provides regular opportunities for students to reflect on, assess, and ‘demonstrate understanding of my ideas *and* their application’. The purpose of coach feedback appears to provide a form of ‘triple callibration’:

- finding out what the university regards as legitimate and competent - so to do with learning the ‘rules of the academic game’;
- figuring out how to apply the ideas in practice – ‘you’re not alone in your struggle with this concept’ and ‘you don’t have to buy into all these theories – what do *you* think?’; and
- orienting self on a broader more personal development journey in which the MA studies form a part not the whole: ‘validating my thoughts and ways of self expression’.

In addition, the feedback offered by the coach can also dynamically offer resources ahead of time, offer new threads not in the ‘body of knowledge’, and raise questions which both broaden and deepen the field of study, to seek to match where each student happens to be at that time.

Students who generally start in a rather passive follower mode, not having studied at a university level course for many years, if at all, begin to recognise the value of their own experience and tacit knowledge. They develop the confidence to subject their own views to critique in the public domain, and leave behind their initial ‘imbibe the jug of knowledge’ stance. This flexible learner orientated form of coaching has I sense gradually evolved into a process that has a ‘side by side’ feeling to it, where coach and student are very much co-learners in the business of improving leadership practice, and where the ‘body of knowledge’ is seen more as a ‘provocation’ to personal experience and meaning for *both* inquirers in the relationship.

Here are some typical responses from students that illustrate the effects of this process:

- It feels to me like it evolves, builds, and responds over time to my own changing needs, supporting my ongoing experience – quite eerie how closely it fits what’s going on in my job! It also gets more open and challenging as time passes, requiring us to become much more reflexive and self critical in what we’re writing e.g. in the Phase 6 essay - ‘frame your own question, and explore the meaning(s) of this choice!’
- The Phase 3 exchange really kick-started the process of developing new confidence in working in different contexts and roles. I’ve got a stronger sense that ‘I can do this’, ‘I can fit in’, ‘I can make a valid contribution in contexts other than my own’. I certainly couldn’t have handled the challenges in this project role six months ago.
- It’s not like ‘doing a course’ where you learn some techniques, and every now and then think about them when you’re back in the office – but really don’t know how to use them! With the MA I’m encountering new ways of thinking every week, constantly prompting me to reflect on what’s going on in my workplace differently - and then do something about it. The programme agenda becomes ‘my agenda’ and I’m not just studying it for possible later application, I’m *doing* it!

These examples provide some support for what Ronald Barnett has suggested in his book on Realising the University (2000): that students need to be engaged at the level of ‘ontological uncertainty’ if they are to gain the knowledge they need, to make an effective contribution in a world characterised by what he calls ‘supercomplexity’ - where no claim to the truth goes unchallenged. Through taking on more of a ‘side by side’ role and helping connect and contrast academic input with both practical issues and the considerable tacit knowledge of students, coaches can take steps to ensure that this kind of uncertainty is experienced (by *both* parties) in the actual learning situation.

These insights into student experience begin to suggest that we have something here that is somewhat ‘closer’ to students’ practical development needs than might have been expected. The ‘side by side’ role played by the coach seems central to achieving the various ‘callibrations’ that help students focus on learning to improve their own practice, and at the same time, enable coaches to shift role from tutor/coach to that of ‘mutual inquirer’. What is now much clearer is that it seems quite possible to create a pedagogy which is quite *personal* in character, where knowledge appears to be largely *co-constituted*, and where the learning is very much to do with *local performing contexts*.

* * *

As a result of these experiences I’ve formed the following working hypothesis: ‘close learning’ in the pedagogic or development space is best achieved when the coach is able through his/her ‘receptive-responsiveness’ (Rayner, 2006), to ‘in-dwell’ (to live with something at a tacit, experiential level for a period of time) to a significant degree the *learning relationship* between coach and student. When this in-dwelling or interiorisation happens (Polanyi, 1983), a special kind of ‘resonance’ is possible (Mason, 2002; Boyatzis, 2005) where the coach is able intuitively to make comments and share ideas which seem to come from *within the relationship*, providing powerful support to the student. This is why I call this a ‘side by side’ inquiry process bringing a kind of cybernetic mirroring into the present moment. It’s not something either party can do on our own: ideas need to be developed, fleshed out, and brought to life *jointly*

as we both work together, tacitly developing new values and aspects of identity as we ‘...submit to them by the very act of creating or adopting them’..’ (Polanyi, op cit). This very much constitutes the conditions for a ‘culture of inquiry’.

Close learning here is very much about ‘forward projection’ where learning created by practitioners while studying for a degree in higher education, is understood and applied in their ‘performing space’, creating a ‘pedagogy of the personal’ within a generic programme. In the next section we look in more detail at what might be involved in creating what might be seen as a ‘reverse’ process where working more effectively is the prime aim and how the largely tacit learning that occurs can be brought more to consciousness and ‘pedagogicized’.

End Notes:

i Batteau, Gosling and Mintzberg define ‘close learning’ as follows: ‘We refer to this design as ‘close learning’ because it is close in time and place to where the work gets done, the participants’ leadership practice...close learning is concerned with knowledge that exists primarily in the mind-body relationships of the learner. It is created and displayed in the way things get done—and in what gets done. As thinking changes these practices change, and more aspects come into focus. It is a process of discovery and, in essence, mastery, rather than one of explanation’.

ii It’s worth spending a bit of time unpacking what this idea of closeness or nearness might mean. In Gosling and Mintzberg’s work, the term initially came up in context of distance learning but now I think the use is more to do with the focus being on practice rather than education per se; and it appears to mean bringing experience to the classroom so learning there can be transferred more easily to the workplace. What’s more interesting is the notion that it needs to/will also influence not only the individual but the workplace too. So we get the idea that the learning is not just about the isolated individual. I would like to make this more obvious: ‘close learning’ is not only about influencing individual practice but about influencing the relational and social dimension, the context, in which these improvements in practice might take place i.e. changed practice requires support from those around it, and the norms/power disciplines that legitimate certain claims to truth and marginalize others.

So we’re talking about more than individual learning here, and starting to move towards ideas of communities of practice (Wenger,1998) who learn together, much of it at an implicit or tacit level. I would also like to dynamise the idea further and propose that ‘closeness’ goes even further to take account of the process and complexity theory assumptions i.e. that the future is constructed in a fleeting present moment, against a complex and continuously changing social/political background process. So we are not talking just about situated learning being brought closer to the domain of practice but that this situated learning be embedded in a higher level learning process that enables participants to continuously update and re-contextualise that learning in the light of emergence. Without this, any learning is almost immediately de-contextualised and outdated. This brings to mind what Torbert (2004) has called ‘triple loop learning’.

APPENDIX 14: Ladkin et al, Developing Leaders in Cyberspace, Leadership, May, 2009

EXTRACT - final draft on action oriented nature of the pedagogy used in MA (written by KK)

What we are trying to achieve with ‘close learning’ is to facilitate relevant learning/development close to the situation of action – so the ‘transfer gap’ between ‘learning/applying’ is minimised. In the optimum position, as in improvisation where ‘composing/playing’ becomes simultaneous, this gap is eliminated. By definition this involves encouraging students in attempting to use new ideas to inform their behaviour-in-context i.e. in action, and then to learn something about themselves and effective practice from these experiences – both in the now and later in reflection and questioning with their online coach and colleagues.

In this sense there are resemblances to various so-called ‘action’ strategies that have been used with some success in the development arena. Raelin offers a useful summary of six main approaches in this area as well as a set of criteria by which to compare and contrast these. He writes:

‘The common basis for most of the strategies is that knowledge is to be produced in service of, and in the midst of, action (Peters and Robinson, 1984). Their emphasis is on the interplay between enactment and feedback in real time with the purpose of developing more valid social knowledge, more effective social action, and greater alignment among self-knowledge, action, and knowledge-of-other’. (Raelin, 1999, p 117)

He identifies further similarities between these approaches as being ‘...inherently participatory.’ with a ‘...considerable focus on re-education and reflection...’, ‘...interested in conceptualizing their experiences in a way that is meaningful and valuable to the members of their research community...’ and taking a direct interest in the ‘...role of context and feelings in the inquiry process itself.’

Though students are studying for a higher degree at Exeter, our ‘close learning’ approach in all other respects signs up to all of these principles: the participation aspect does tend to be mainly between student and coach, but there is significant emphasis on reflection and changing thinking patterns, directing attention to matters of context and emotion, and, through the dissertation process, seeking to generate new knowledge for the practitioner community.

We’d single out two of the six strategies, *action learning* and *developmental action inquiry*, as perhaps offering the closest comparators to our ‘close learning’ approach. Through inspection of the set of 14 ‘action criteria’ Raelin created for his contributors to this special edition of Management Learning, we mention the following as being particularly true of these connections:

- Regarding similarities to ‘action learning’ (Marsick and O’Neill, 1999), we’d identify the attention to problem ‘framing’ (as well as problem ‘solving’), the emphasis on learning from experience/tacit knowledge, and the focus on ‘cycles’ of framing/action/reflection/re-framing as being important parts of the learning process.

- In relation to ‘developmental action inquiry’ (Torbert, 1999) we’d pick out the working through of multiple ‘levels’ or territories of experience like Torbert’s ‘outcome/behaviour/strategy/intention’, regular inquiry ‘up and down’ some ‘ladder’ of inference/abstraction, and the seeking out of ‘incongruities’ between intention and practice, as key epistemological processes between students and coaches

From the general characteristics identified by Raelin mentioned above, and these kinds of connections there does appear to be some justification for claiming that ‘close learning’, despite its location in a higher degree programme of leadership ‘studies’, is at heart an ‘action’ strategy, meeting to a large extent the criteria identified in the Raelin quote. However there are also quite marked differences to the strategies he identifies which we need to take note of as they are likely to alter the learning pedagogy and hence the focus and nature of the learning that does take place.

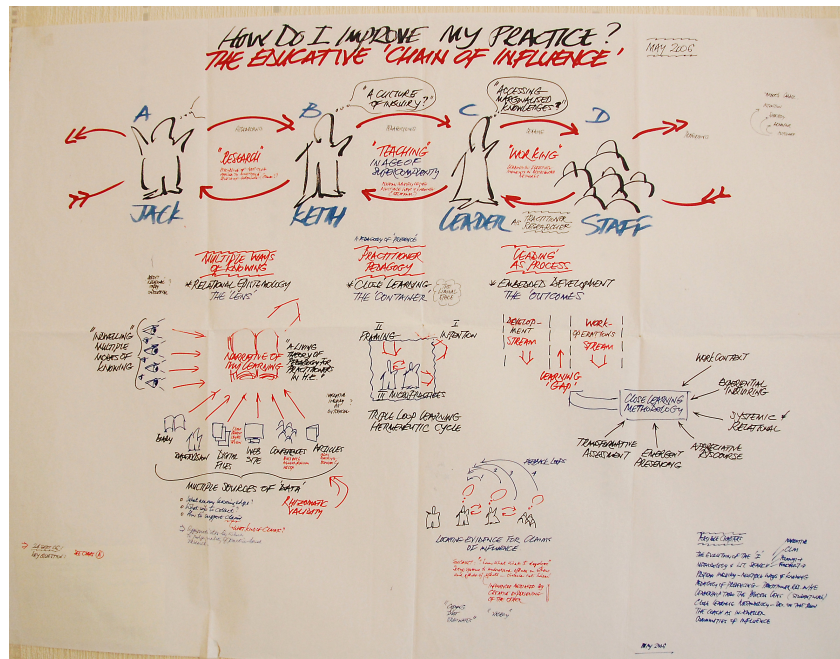
To make just one illustrative comment in regard to action learning, the ‘communication process’ used in the Masters programme is rather different:

- In the former, the communication process takes place primarily in face-to-face verbal interactions in the here and now of group meetings. In contrast communication in the MA is primarily written, asynchronous, and flows in the ‘virtual channel’ of the web based system between a coach and student (though the discussion forum does allow some asynchronous group discussions)
- The potential for real time social construction of everyday meaning (Gergen, 1999), face-to-face with a group of colleagues in the action learning set, is replaced by the potential for a slower paced more reflective and creative process of *cycles* of meaning making over a longer period - supported by the more pointed, demanding and varied questioning and/or encouragement from the online coach - who is also always there, but ‘in the background’
- This ongoing reflection process is further stimulated by an ever-present flow of challenging academic readings offering models, theories, and cases, an associated regime of thinking/reflecting exercises, the regular writing of learning logs, and responding to coach feedback.
- In this more ‘spacious’ process, students have the opportunity to explore and contrast the value of learning through the parallel processes of writing/coach critique and experiences at work. They also seem to have more creative discretion to decide what particular meanings to value most in the face of their own experiences in the context of their work. In this sense, and despite the HE ‘teaching’ context, mature students seem to have a greater possibility of accessing and realising the value of their own ‘tacit knowledge’ (Polanyi, 1958) as it gets challenged/supported by the study process
- Though it’s likely that in the early days of a new student cohort, the direction of the learning process will tend to flow from theory (I read this idea...) to practice (I then tried the technique out...), many students soon begin to reverse this process, and, as in some forms of action research, ‘pull in’ theory/models from what’s on offer, to help them with the problems they are facing at work (Winter, 1989)
- The usual focus of practical problem solving and confidence building of action learning set work, does of course have its place, but these matters are usually looked at in the context of a rather more challenging longer term programme of study demanding a more rigorous level of analysis, argumentation, and justification

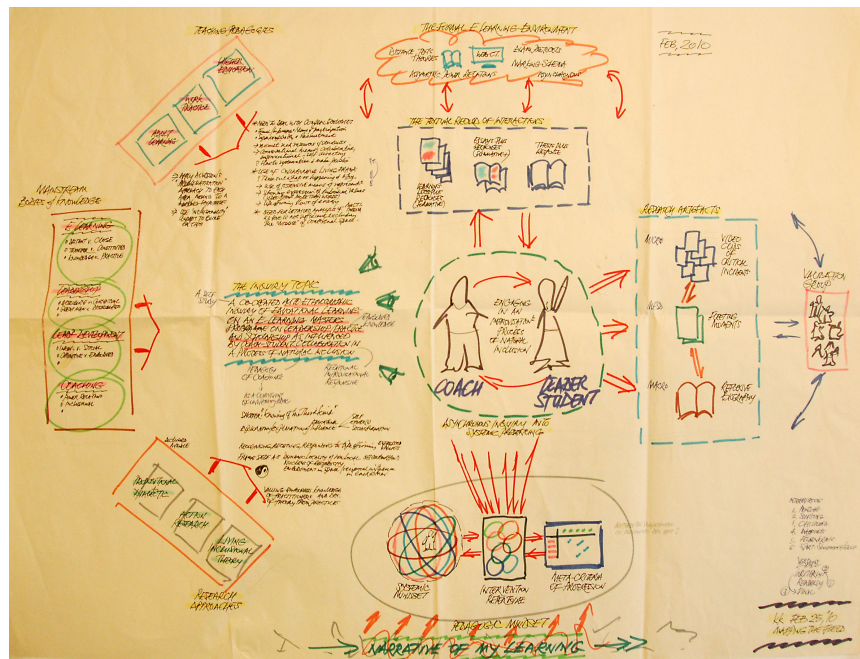
So despite the significant differences, CL does appear to some extent to create an action oriented pedagogy like other more obvious action methods, and this is no doubt one of the factors which gives it the practice oriented feel that students remark upon. Beyond these approaches we can see that there are a number of reflexive tools that are used by some coaches with some students some of the time to improve the quality of learning and application. Because these work most effectively in the context of longer term and close attention from a coach, these may or may not be used in these other action approaches, for example the useful repertoire of reflection tools developed by (Gray, 2007)

APPENDIX 15: Diagrams: outlining framing and process of the PhD process

a) Diagram prepared for supervision session May, 2006



b) Diagram prepared for supervision session February, 2010



Note: these are presented in the body of the chapter, so this section is here just for consistency.

APPENDIX 16: Video of Jack Whitehead -KK on ‘presencing’ - clips 1 and 2, October, 2008

Video Clips - the identification of ‘presencing developmental possibilities’

These two clips are taken from a supervision session I had with Jack Whitehead on 28 October, 08 when this concept first emerged during the conversation. This was the first time that our discussion was video’d and so I’m fortunate enough to be able to show you how this happened in the moment.



<http://www.youtube.com/watch?v=IZC-DvE7N50> – *presencing developmental possibilities part 1*



<http://www.youtube.com/watch?v=o6PiA7txcuk> - *presencing developmental possibilities part 2*

The two clips which are also presented in the body of the chapter are explored in depth in Chapter 3, so included here just for consistency. When you get to Chapter 3, I hope you pick up the excitement in both Jack and I as we both seem to realise that we’ve identified something that is unique to my approach to working with MA students.

APPENDIX 17: E mails between JW-KK on topic of ‘living theory and standards of judgement’

EXTRACT - Notes and questions on Whitehead’s ‘living theory’, 23 February, 2003

Since completing the transfer paper and receiving your e mail of 18.2.03 about how I might respond to a question about the expression and communication of my embodied values, I’ve been reviewing the materials you’ve provided on this point. I’ve noticed that there is an almost hypnotic repetition of certain phrases that run through your papers and e mails which point to your main thesis, and which remind me of the phrases used by Maturana and Varela to describe some of their ideas. In both cases I’ve found it quite difficult to really grasp the meaning at first reading, and because there is such a consistency in the words/phrasing, wider reading hasn’t cast much new light on my confusion.

So I decided I would make a special study now of this material to see if I could make a bit of a breakthrough before the assessment discussion and before I get down to serious business with a client in this next phase of the research. I’ve collected all the bits that seem relevant and summarise them here as I understand them, as a series of statements before trying to delve into their meaning(s) and their implications for me:

- In terms of valid knowing, the unit of appraisal is my claim to know my own educational development – to understand the world from my point of view, the ‘I’ doing the research (note: the ‘I’ is not the name of a person....?)
- When I include this ‘I’ as a living contradiction in my research, I’m led to methods of inquiry which are educational i.e. I can look for answers to questions of the kind: ‘how can I improve my practice?’
- This living contradiction arises from the fact that I hold contradictory values i.e. I believe in certain values but my practice often negates these, creating a tension between theory and practice...so I live in contradiction, hearing dissonant voices from my multiple selves
- Education is seen as a process where I learn to live my embodied values of humanity more fully e.g. freedom/democracy/justice/love/living a productive life/etc
- As education is a value-laden activity there will be examples of these being supported/negated. Most motivating is to start analysis with my experience of their negation in my practice (Larter) and the emergence of my values as I struggle to overcome their negation
- If I can explain my learning within these contradictions, I can create a ‘living’ theory and an ‘epistemology of practice’...how I know what I know, and how I can continue to live with these practices
- These knowings, these explanations of my learning, arise as I clarify the meaning of my embodied values as they emerge through my inquiry
- In the course of their clarification – which comes through understanding their meanings within relationship i.e. they have a *relational* meaning, these embodied values (which I could also call my tacit knowing-in-action) can be transformed into living standards of judgement (evaluative principles) which I use to account for my learning i.e. ‘I know I’ve learned this because.... (offer an explanation associated with an embodied value)’

- This is a case of working without rules in order to formulate the rules of what will have been done (Lyotard) and goes along with the idea that efficient practice precedes the theory of it (Ryle)
- These values are not fixed but are ‘living’ and developmental (Laidlaw)
- This learning can be communicated to others in the public domain as standards of judgement (epistemological standards)
- Though these can be communicated in language, this communication cannot be in the form of propositional logic alone, requiring ostensive definition via living dialogues on tapes, video clips etc which demonstrate my descriptions and explanations of practice and my knowing-in-action
- These standards can then also be used by others to judge the validity of my claims to know something about my own development
- This process then leads to ‘living’ educational theories which describe the *relationship* between my accounts of learning and my practice i.e. how I work to reduce the contradictions between theory and practice
- These educational theories shape a professional’s sense of identity
- The standards of judgement for assessing the validity of claims cover methodological, logical, ethical, and aesthetic standards and include questions of the following kind:
 - * was the inquiry carried out in a systematic way?
 - * are the values used clearly shown and justified?
 - * does the inquiry contain evidence of the critical accommodation of propositional contributions?
 - * are assertions clearly justified?
 - * is there evidence of an inquiring and critical approach to educational problems?

So with this summary of all the relevant pieces of what I see as your ‘theory’ of and approach to action learning, let me offer some initial reflections on what I’ve gleaned so far:

At the level of knowing-in-action, I’m using some standards of judgement to decide whether what I’m doing is right or not, and whether others’ work deserves praise e.g. my message to Paul about the importance of quoting his local knowledge. These standards can be thought of as values because I decide on their basis, whether or not something is good or bad. But because I’m often not conscious of what standards of judgement I’m using in the moment – they have become streamlined and tacit through many years of evolution and use - they can be thought of as *embodied* values, not theoretical or espoused values.

So it’s right to think that they will inevitably emerge in my practice as I’m pushed this way and that by client challenges – what really counts for me, will out! So, as you say, I identify and clarify the meaning of my embodied values in the course of their emergence through my practice. And, as they emerge, I can see that they perform a dual function – they are my deeply held values for whatever reason (after all I’m using them on an everyday basis) *and* I’m using them to evaluate my own and others work – so they have also been transformed into criteria or standards of judgement.

So I can use them to evaluate my own learning and likewise expect others to use them to assess my claims to this learning....because I’ve decided I should understand the world from my own point of view – using my originality of mind and critical judgement embedded in my unique embodied knowledge - and not follow the views of others who

through power relations, attempt to influence me as to how I ought to evaluate my own learning.

But if I wish to influence others, I need to follow certain rules of the game. I need to expose to public judgement the evidence I'm using to make these personal claims of learning and influencing others. And I need to do this in a convincing way which encompasses my whole experience of living not just those parts that fit with my theory/espoused values/who I'd like to be. So it's important that I expose the 'I' that is doing this learning and evaluating, in a full sense – both those aspects where things are working and those that are in a sense a negation of that desired story, the contradictions that I create and am exposed to as I try and live a worthwhile life in the real world, within multiple relationships and in the face of conflicting pressures.

In doing this I become more aware of the who this 'I' really is, in a moment to moment way, and through becoming aware of the gaps that are there against how I would like to be, I am motivated to take corrective action. Thus my narrative of my own learning becomes a story about me becoming aware of who I really want to be, and my efforts through my practice, to realise through my daily interaction with others in my personal and working life, these embodied values/sense of identity.

Another piece on living standards of judgement. 25 March, 2009

From: Keith Kinsella [kckinsella@btinternet.com]

Sent: 25 March 2009 10:24

To: 'Jack Whitehead'

Cc: 'Keith Kinsella'

Subject: values/explanatory principles/stds of judgement....

Hi Jack

I seem to be having a lot of difficulty grasping this little triangle of ideas that constitutes 'living theory'! Going over my earlier writing and your several responses, reading your latest AR paper, and looking at the 1996 paper by Lomax and Parker, I have come to the following understanding this morning:

1. I have an educational *practice* which involves me in doing certain things in certain ways – 'this is *what* I do'. Looking at a video clip of myself, I might see e.g.: I am asking the student questions in a certain tone of voice/facial expression, about a claim he has made, 'casting doubt' on his interpretation as being *the* answer, and encouraging him to *seek other and possibly multiple answers*.

2. Embedded in this example of what I do are educational '*living*' *values* that energise/motivate me to choose to do this activity at this time with this student and shape the way I do it. If I can identify these embedded values I will be able to use them to say – 'this is *why* I do what I'm doing'. In explaining this 'why I do it' I will be identifying the *explanatory principles* which I feel are adequate for explaining/justifying to others why I do what I do. So if we go back to the 'casting doubt' example (and other responses in my 'repertoire'), I might say that there are several reasons why I'm use this form of behaviour:

- He has a habit of seeing things in a way in which he holds no responsibility and I'd like him to reconsider this

- He has not taken any account of the ‘system’ he is working in, or the ‘power relations’ that are at work, and so is neglecting some important aspects that influence the context that I’d wish him to be more aware of
- We live in a complex and uncertain world and I think it would help if he was more aware of other possible explanations that might influence the effectiveness of what he might do

If I look at these examples of reasons for doing what I’m doing, and try and sum them up, I’d say that I am doing these things because I believe that if he does think again/think afresh along these or similar lines, he will broaden and deepen his understanding of the situation he is facing, and so will be able to make better decisions about what he wants to do, why he wants to do it, and how he might best do it. In saying this I’m identifying one *explanatory principle* that I make use of in explaining my behaviour and showing my influence i.e. in seeking to help them take charge of their learning and lives, I believe one important contribution I can make is to encourage them to go beyond immediate and commonsensical ‘reactions’ to situations. Jack calls these ontological values and adds: and now I should go onto **how** I do this – so a ‘how’ std of judgement – through my embedded value of ‘presencing developmental opportunities’

Regarding the next paragraph Jack differentiates between the ‘knowledge claim’ itself e.g. ‘I’m helping them go beyond commonsensical reactions’, and the ‘nature of explanation’ I offer to justify this claim. In this context I think he is referring to the different epistemologies we can use i.e. propositional, dialectic, and inclusional. He suggests I look at Sally Cartwright’s work to appreciate this difference (see Huxtable 2009 paper which Jack will send). See further notes on these epistemologies below.

3. How to relate this to my *standards of judgement*? If I submit this example with this explanation to the Academy I will be making a claim to knowledge about my educational practice: ‘this is what I do and this is why I do it’. In seeking to justify this as original knowledge of educational practice that I believe should be taken account of (when assessing educational practice in higher education of leadership students), I feel I need to add further justification which responds to the ‘why of the why’ question: ‘So this is why you do it. Fine...but so what - does it make any difference? I think what follows is what Jack means by ‘nature of explanation’ And to answer this meta question I need to be able to say something along the lines that: ‘my students report that my behaviour has in fact helped them develop a more questioning and contextualised approach to situations which has increased the learning they’ve got out of the programme...and hopefully has also led to improved performance at work’. And in responding in this way I’m answering the ‘why of the why’ question by saying in effect – I judge my educational performance in regard to how well my students are enabled through my contribution to really make a difference in their working lives. So this is one of my **standards of judgement** – education should help people make more of their potential and life opportunities. So this is my response to the why of the why question: *this is what what I do, does!* And in saying these things, what kind of epistemology am I referring to here? It’s clearly not ‘propositional’. I suspect I will be appealing to a ‘dialectical’ frame in the sense of me trying to close the performance ‘gap’ between what I could be achieving in improving my practice here, and what I am achieving...?

So useful to talk this line of thinking through in more detail....

Also would be useful to explore the propositional, dialectical, and inclusional epistemological logics you refer to in your latest paper, and how these might influence the kinds of explanations/standards of judgement I write about.

Talk/see you at 11.00

Keith

Added after meeting with Jack Whitehead:

Three kinds of epistemological explanation

1. *Propositional*: theory is an explanation of a general concept e.g. ‘psychologists say that asking questions gets better engagement from students’. So I try this hypothesis out to see if my experience fits this concept or if there is a contradiction – which is not allowed
2. *Dialectical*: this is grounded in contradictions which can’t be eliminated (dilemmas) e.g. ‘we want more equity in education and have implemented policies to do this – but the gap is even wider’. This also applies to personal values and the gap between espoused and enacted. The SOJ’s here are to do with how you go about resolving e.g. the asymmetries of power and so closing the gap.
3. *Inclusional*: the SOJ’s here are to do with the living values that are embodied in receptive responsive dynamic relations between people as they go about and take charge of their work – so in my case ‘presencing developmental possibilities’ would fit in here

So if I go back to the claim I made and Jack’s response as captured in the e mail as follows:

On 22 Mar 2009, at 21:59, Keith Kinsella wrote:

‘...through my receptive, responsive, inquiring, and presencing behaviour I help create a culture of inquiry for students that helps them experience, learn, and embody leadership behaviours that fit them for making a contribution in a world of supercomplexity’

Jack responded:

‘If we think of your standards of judgment as practical (‘and explanatory’ KK) principles you use to explain what you do and the influence you have, the six explanatory principles will need to be closely related to the above claim. As you say the following six standards of judgment together provide the engine for powering my work with the students.’

1. *Making a difference*
2. *Doing a ‘good job’*
3. *Seeking multiple understandings*
4. *Seeking to reduce the gap between learning/doing*
5. *Embodying learning in practice*
6. *Striving for ‘knowing of the third kind’*

So when I look at these six proposed SOJ’s and compare them with what seemed to be coming out of my ooVoo discussion with Jack, there seems to be differences. The discussion surfaced an SOJ that involves me in asking myself:

'am I closing the gap between a liberating/practice oriented and dialectic/inclusional education and the more formal academic propositional education that the MA/higher education usually offers'. This is a 'what' type of SOJ

And secondly in responding to the question:

'am I presenting the development opportunities that are latent in the everyday activities that students are involved in, in order to enhance and accelerate their readiness and capacity to create and exploit the different kinds of knowing available to them' This is a 'how' type of SOJ

In terms of 'kinds of knowing' I'm thinking of e.g. *the personal, inclusional, reflexive, dialectical, and knowing of the third kind, and the propositional/formal academic*

On the surface these two SOJ's are different to my putative 'list of six'. Perhaps my thinking about SOJ's is evolving as I talk about them – so possibly these two are more 'fundamental' than the earlier six? I should also have a closer look at the relations between the six and the two.

*E mail from Jack on 020409
Re: today...and the next day!*

Hi Jack

I attach some reflections on our discussion yesterday that I've added to the original e mail I sent you in the morning. Because I had difficulty hearing you I wasn't able to clarify sufficiently what I thought you were saying on several occasions so I'm hoping what I attach will reveal important misperceptions on my part:

I began with what I saw as three different 'ways of talking' about the values embedded in my practice - as:

1. 'living values' that seem to cause the what I'm doing, which can be identified through reflexive questioning of various texts; as against their use as
2. practical 'explanatory principles' where I'm using them to explain the why I'm doing something, which can be identified following the 'because' clause as against me claiming them as new
3. 'standards of judgement' (SOJ) where I'm using them to identify the 'what what I do, does' effects on the education and practice of my students

Hi Keith - sorry for the delay -

Let's focus on our meanings of standards of judgment. I'm using SOJ in an 'epistemological' sense of understanding the standard of judgment that is used to evaluate the validity of a claim to knowledge. This is how I know what I know

We started talking about my writing about the 'casting doubt' behaviour (what I do) where I'd written - in order to encourage them to 'seek other/multiple answers' I'm not sure whether this could be seen as an embedded value in this behaviour but that's where it 'fits' at the moment. We then looked at what I'd written on how I'd respond to the 'why are you doing this' question. I'd written several things which I had then summed up by writing 'when I help them go beyond commonsensical 'reactions' to situations, I help them take charge of their learning and lives'. So I

see now that I'm using this as an explanatory principle.

I agree - helping individuals to take charge of their learning and lives seems to me to be one of your ontological values in the sense that you use this to give meaning and purpose to your own life and express it as an explanatory principle in your relationships with your students. OK!

I had then written a paragraph which I thought described how I thought the term 'standard of judgement' could now be used. I thought it was the answer to the next level of question about consequences – 'so what does 'what what you do' do?' and said 'I judge my educational performance in regard to how well my students are enabled to make a difference in their working lives'. I thought that this was a standard of judgement in the sense of my fundamental belief that people should make the most of their potential and life opportunities.

I understand this standard of judgment and you are using it appropriately here. OK! I tend to use 'standard of judgment' in the epistemological sense that it refers to a claim to knowledge and particularly to the standards that are used to evaluate the validity of the claim. So people should make the most of their potential and life opportunities is just such a standard then?

During this part of the discussion you clarified two things:

1. You felt I should continue my explanation regarding 'take charge of their learning and lives' with a connection to how I try and do this through using my embedded 'presencing development opportunities'; and
2. you felt that this was a 'how' standard of judgement. As things stand I've got 'presencing' down not as a standard of judgement but as a means to an end – which 'end' I see the SOJ's as describing?

As long as you are clear about the meaning in use you are OK. You can use 'presencing' in your sense as a means to an end. There is also another ontological use of 'presencing' to point to/express/describe a way of being. OK I see this: so two meanings and I need to be clear which one I'm using at the time: so I'm 'presencing developmental opportunities' in order to help them 'to presence themselves effectively'

3. You said I should differentiate between the 'knowledge claim' itself, and the 'nature of explanation' I offered in support of this claim. Because I thought we'd just discussed both of these, I got confused and wasn't sure whether your use of the new term 'knowledge claim' was the same as 'what I do', and whether your term 'nature of explanation' was the same as 'explanatory principle' both as identified above; or whether these were different concepts?

In my understanding of a knowledge claim it is a claim you make that something is known. It is different to 'what you do'. Except in claiming 'this is what I do' I am making a claim to knowledge of a kind, am I not? The knowledge claim is a claim to know something about 'what you do'. Next point There is a distinction between the nature of an explanation and explanatory principles. We can explain something in a range of different ways that sometimes draw on the conceptual frameworks (theories) and methods of validation of disciplines such as philosophy, psychology, sociology, history, management, leadership, economics, theology and politics. The theories, being explanatory all contain explanatory principles. These are the principles

that explain why something happens as it does. So I might claim that when I 'cast doubt' the student reviews their explanation and looks at other options which helped them get clearer what they mean. This is the claim. How I then explain how this happens e.g. because they don't like uncertainty, because they would like to please me because I'm the teacher, etc are appeals to one theory or another – and these are then the explanatory principles I am using.

Later on we got to talking about 'closing the knowing gap' as a what SOJ and 'presencing' as a how SOJ, and compared these to the six SOJ's I'd described in my e mail. I think where part of my confusion now arises is whether these six could also be SOJ or be seen as lower level and subsidiary 'means to an end' type standards which, though they do influence why and how I do things, are perhaps not primary parts of my educational becoming. For example 'seeking to reduce the gap between doing and learning' is something I'm trying to do all the time (close learning), as is 'striving for knowing of the third kind' which to me is the kind of knowing that is essential to improving ones practice. So....??

I think that you will find that 'presencing developmental possibilities' and 'enabling individuals to take control over their learning and life' can be understood in relation to your ontology in the sense of explaining why you are doing what you are doing in relation to the values you use to give life its meaning and purpose. I think that you will find that your 'six SOJ' are pedagogical devices you use to enhance your educational influences in the learning of your students. So now we have a new term – pedagogical devices! I wonder how these relate to values/principles/SOJ when they can read just like any one of them? Must do more on this - a constellation of explanatory terms

I really can appreciate your questions - don't hesitate to send more on. I'm hoping to have some e-mail connections whilst I'm away, but the first week may be without communications in the Grand Canyon!

Love Jack.

Hi Keith - along with presencing developmental possibilities I think you have set out other standards of judgment in your notes from our conversation on the 3/03/09:

On 12 Mar 2009, at 09:30, Keith Kinsella wrote:

- However in addition I use other less academic criteria to reach my final judgements. First of all, I want to hear their *own voice* in terms of how they have experienced a particular idea/concept both in thought and deed – what did it feel like to you, and what are your reflections on it now as someone who's tried it out; *in what ways has it changed you?* And then I want to see what they are doing or going to do with the now experienced idea, in terms of *developing a level of skilled performance*, and *applying it in their own practice* in order to improve their own and others' performance. (note: I could transcribe the actual words I used in our recent discussion here..?)

I'd transcribe the actual words you used, because this is where you first made explicit your tacit understanding

- In other words, as a key part of the outcomes from the MA, I'm interested in them *making a difference* in their world of work. So, as my intent focuses on situated performance, my criteria go beyond the usual requirements of the representatives of the university, the academic director and the external examiner, to include the kind of tacit and embodied knowing that leads to authentic performance in real life situations. Because if it's not understood in an experiential way and embodied, it's not going to work, and they are not going to exercise the influence for good that they're capable of.

I think your meaning of 'leading to authentic performance in real life situations' is an ontological value of yours that you can bring into your thesis as an original standard of judgment as you clarify its meaning in the course of its emergence in your practice.

When you ask about assessing the effectiveness of your actions and those of your students I imagine that you encourage the creativity of your students (as well as your own) in enabling them to generate their own self-set standards in living a productive life in professional contexts that carry pressures to conform to culturally 'imposed' standards.

APPENDIX 18: Exchange of e mails between Alan Rayner - KK on 'inclusionality', March 2010

From: [Keith Kinsella](#)

To: bssadmr@bath.ac.uk

Cc: '[Jack Whitehead](#)'

Sent: Monday, March 01, 2010 8:56 PM

Subject: Coaching and inclusionality - natural partners or what?

Dear Alan

I'm doing a PhD with Jack Whitehead that is focusing on my coaching practice over 7 years with mature students doing an e learning MA in Leadership Studies at Exeter. I had a very enlightening supervision session with Jack on Friday morning and it now looks like I just might be able to complete my thesis this year, if I get my head down and start writing!

Though I've been some time coming to this view, during the discussion it became increasingly clear to me that your development of natural inclusion/inclusionality might just offer me the 'big idea' that could help me distil/synthesise what I'm doing. Since the discussion, a number of thoughts have been buzzing round my head, and as I start to look at your written work in more detail, I thought I'd drop you a brief note to see if you might be willing to give me a very quick reaction as to whether or not I'm roughly on the right track or barking up the wrong tree - before I go surging down this path too much further.

I've been interested in relational thinking for a long time now coming into it through e.g. studies of systemic family therapy as carried out by the Milan School, social construction, Foucault's disciplinary view of power/knowledge, work on embodied cognition by people like Varela and Lakoff and Johnson, so-called 'process' views of an excluded middle, complexity theory, Shotter's 'knowing of the third kind', and so on. As a result of experiencing the delights and insights offered by these multiple perspectives, I believe I've developed a coaching pedagogy that creatively embodies many of these ideas in the service of helping students make the most of their learning potential over the two year programme.

Helped by Jack, I've started to describe my primary educational task as 'presencing developmental opportunities' - even to the extent that I sometimes borrow Judi Marshall's phrase 'living life as inquiry' to say that I'm 'living life as presencing developmental opportunities' - in myself, in my students, with family/friends, clients, and in the social educational formation I'm a part of at Exeter. Influenced to some extent by Scharmer's work at MIT, I see this term as meaning the bringing into an embodied present those ideas, outcomes, capabilities, and behaviours that I and others want to have happen. The critical thing for me is that I/we are working/behaving *in the present* on being these different people/parts of a network, and not talking about/planning/making commitments to, and so on, some desired future.

Two of the particular areas that I've been applying this 'close learning' approach to are: the separation between 'developing' and 'performing' and the 'transfer gap' that results; and the separation in higher education of propositional theory, as generally offered by academics, and praxis/theory based on practice, that practitioners generally find more useful. In both of these instances I've been using my design, facilitation, and coaching skills to in a sense 'heal the breach' and reconnect the separated parts, so that my students/clients can experience the 'whole in context', learn more from their experiences in the present, and do more with this learning also in the present - whether they be working on an MA or taking part in a corporate development programme.

After watching your 'playing with a piece of folded paper' video again and reading your paper with Jack on the 'transfigural self', I started to see what I was doing in a new light, and it's this that I initially want to check out at with you. What I'm thinking now is that **my coaching work attempts to provide the *dynamic connectivity* – or the relational 'receptiveness-responsiveness' - that helps learners heal the ruptures that they conventionally experience as they work with conventional linear logic offerings:**

- So instead of learning something in one context which they then 'transfer' and (try to) apply in another, they experience a process where they learn/perform at the same time and in the same context, just as a very good jazz improviser tries to eliminate the gap between creating and then performing a new melodic line, as she/he performs live with colleagues.
- And similarly in higher education, instead of first learning about a rational model of leadership in one classroom setting and then seeking to apply it to their experience in another say work-based setting, they are enabled to play with both explicit propositional and their own tacit theory-in-use models, and improvise responses as they tackle real work in its own setting.

So in this model of coaching I see myself as trying to help others locate themselves (and immediate colleagues/networks) in their contexts of performance, encouraging them to creatively improvise and collaborate with others to construct in present behaviour how better to go on. And in doing this they are at the same time also e.g. 'learning and developing new knowledge and skills' and 'synthesising ideas and models from theory and practice'. **This feels to me to be an example of a process of natural inclusion in which my continual 'presencing of developmental opportunities' is a receptive and relationally responsive improvisation to what I tacitly sense the person-in-context (or local neighbourhood[s]) is calling for.**

I'm sorry just to dump this on your table without any invitation or prior request – but I'm now burning to go at this idea intensively and would very much appreciate any callibratory feedback, however brief, that you might be willing to offer me at this juncture. Is my view of my coaching approach/relationship as a potential catalyst for inclusionary learning somewhere in the inclusionality 'ballpark' or do I need to take a step back and think again? And could you recommend any particular writing that I might consult to develop a more critical understanding of how my coaching approach might relate to inclusionality?

Many thanks in advance

Best wishes
Keith Kinsella

From: Alan Rayner (BU) [mailto:a.d.m.rayner@bath.ac.uk]
Sent: 02 March 2010 09:09
To: Keith Kinsella; bssadmr@bath.ac.uk
Cc: 'Jack Whitehead'
Subject: Re: Coaching and inclusionality - natural partners or what?

Dear Keith,

What a pleasure to receive this from you!

Yes, your approach does sound to me to be 'inclusional at heart'. In terms of language and logic, I'd suggest you might find the phrase 'dynamic continuity' works better than dynamic connectivity to describe what you are seeking to provide. Natural inclusionality doesn't seek to eliminate gaps by connecting everything, but instead recognises that 'the presence in the gaps' is a source of continuity, not discontinuity, which doesn't stop at boundaries. In other words, whereas conventional 'whole ways of thinking' treat boundaries as cuts/discrete limits and space as 'void', natural inclusionality treats boundaries as energetic interfacings/influences and space as continuous receptive presence everywhere.

More explanation can be found in the attached draft paper I have written in anticipation of a keynote address in Australia later this year.

Warmest
Alan

Dear Alan

Thank you for your receptive and speedy response. And when I read: 'natural inclusionality treats boundaries as energetic interfacings/influences and space as continuous receptive presence everywhere' and 'recognises that 'the presence in the gaps' is a source of continuity, not discontinuity, which doesn't stop at boundaries, I shout out: of course: how could I see it as something that 'eliminates gaps' when they aren't there! How language entraps the unwary mind...

So this is very useful feedback: instead of 'closing gaps' which seem to be there in my and other's minds and language – hence notions of 'transfer', 'healing', 'bridging', etc – I should focus more on how my practice seeks to reveal the presences which provide continuities between what is distinctive but not discrete. So 'dynamic continuity' it is!

I'm now wondering whether Scharmer's notion of 'presencing' - which seems to be about bringing into the present something that is in a sense waiting to take shape and emerge from a pregnant and mystical future - might bear some kind of relation to your notion of presence...

Thank you again for helping me know how to go on.

Best wishes

Keith

From: Alan Rayner (BU)
To: Keith Kinsella ; 'Jack Whitehead'
Cc: 'Alan Rayner'
Sent: Friday, March 12, 2010 7:48 PM

Subject: Re: influencing the educational social formation...

Dear Keith,

Just to say that I very much like what I read in your note. It strikes me that you have developed (i.e. recognised within yourself) a deep sense of inclusionality and the radical transformation that it entails.

Did I send you the attached invitation? You'd be most welcome.
You might also find the brief ppt (attached) that I've prepared for it of interest.

Warmest
Alan

From: Alan Rayner (BU) [mailto:a.d.m.rayner@bath.ac.uk]
Sent: 13 March 2010 10:45
To: Alan Rayner (BU); Keith Kinsella; 'Jack Whitehead'
Cc: 'Alan Rayner'
Subject: Re: influencing the educational social formation...

PS. Perhaps I might add that what especially impresses me is your recognition that what is needed is more by way of REVELATION of what is, has been and always will be PRESENT all along - by way of receptive and transfigural space - than ADDITION of some new connective construct. The treatment of this receptive and transfigural presence as an absence or 'void nothingness' is at the root of the paradoxical inconsistencies of abstract rationality.

I've tried to bring out this point more clearly in the attached update of my draft keynote. The latter also now includes reference to bodily boundaries as 'restraining influences', which I think helps to bring out their vital role in natural (inclusional) creativity - as distinct from the 'restrictive definitions' of abstract rationality. This role is only possible through the ever-present continuity of 'transSpace', which is revealed through inclusional perception.

Warmest
Alan

On 15 March 2010 13:22 +0000 Keith Kinsella kckinsella@btinternet.com wrote:

Hi Alan

Thank you - inclusionality has certainly been 'revelatory' for me!

I suppose a big question for me now is: what might 'revelation' mean and what are 'revelatory practices'? A metaphor I've used in the past is that of Proteus, a sea god/sage who 'shape shifts' in order to deceive others and make it difficult for inquirers to catch him to get the answers/insights they are looking for. My own more modern version of this shape shifting behaviour is to do with taking on and embodying different voices/perspectives, as a provocation to a client's current explanations and marginalised knowledges. I don't seek to give them my insights but to gain their own insights. The role of the 'protean inquirer' is to find appropriate ways of provoking existing sense making, and to do in a 'close learning' manner so they are able also to presence developmental opportunities in situ in the moment. I see this as a process of becoming for myself and so a relational learning opportunity for both of us. In this view, my 'protean' approach can be framed as a way of promoting the elicitation of marginalised knowledges through accessing multiple perspectives and different voices, through my own version of shape shifting.

The issue now is how I bring this inclusional revelation into relationship with other ideas I've found worthwhile like e.g. that people construct 'things', as well as the local contexts in which these are given meaning, in language and embodied behaviour in relationship with others. I offer a couple of examples of how I'm now thinking about some of concepts I've been attracted to, with examples of related practices that I now think could be framed as revelatory:

The first is Polanyi's notion of 'tacit knowledge' that I've mentioned before. Though there is no mention of Polanyi in his work, I think Steve de Shazer's version of 'brief therapy' where he developed something he called the 'miracle question', might provide one example of a revelatory practice. In this intervention, he says to a client that overnight while he's asleep a miracle will occur that will completely remove all the problems that have brought him to therapy today. He won't know a miracle has happened because he was asleep but the next morning when he gets up and goes to work he'll start to notice things that will demonstrate to him and others that a miracle has indeed taken place. He then goes on to help the client elicit 'signs' of change -- in himself and in others that tell him that things have changed for the better. After much detailed attention to these signs of the miracle, he asks the client now in the present to rank how close to the miracle he feels he already is (out of 10) and then uses further questioning about what this means, what another one point forward would require, and so on. Without implying any 'inclusional' perspective to this approach as such, to me this still has the feel of revelation both in terms of how things could be in a person's life -- so something they could imagine but for the false boundaries they seem to hold; and what would count as evidence of such change which until now they've not seen/heard/felt i.e. these 'facts' have been part of the presence of absence rather than part of the absent presence, waiting to be revealed.

The second is Foucault's concept of 'marginalized/subjugated' knowledges. In Michael White's version of 'narrative therapy', he uses Foucault's ideas to talk about 'dominant stories' that effectively shape a person's life through filtering their awareness of their experience of living, blotting out data that doesn't fit this story and highlighting data that does support it. In his approach he first helps

the individual create some separation/distance from their dominant story (through 'deconstructive' questioning) so they are more able to recognize and revalue events which run counter to the story and where they have been able to be different. Through focusing on these 'exceptions' he helps them create an alternative story and then seek witnesses to support and provide social legitimation for this new view of themselves. In a later book he talks about 'decentredness' where he adopts practices to 'decentre' himself in these conversations, levelling power relations, and giving centre stage to the client's view of things. Thinking about this from an inclusional view, and despite the various words above that imply boundaries of various kinds, I think the therapeutic practice (and the idea of 'decentredness') can also be framed as a revelatory practice, in the sense of helping reveal to the client what's always been there but has lain unnoticed due to the barrier inducing essentially figural energy of past and present languaging.

As I write this, I'm wondering if in your Australian paper your focus on the 'why' and 'what' of inclusionality -- which you've been living in for some time now -- leads you to pay less attention to the 'how' challenges faced by 'novices' like myself in taking and trying on for size, especially the challenges of squaring it with all the other perhaps 'first order' ideas we've got used to. I remember I had this problem when I first came across, during work with the Milan Family Therapy Institute, the 'systemic' idea that individuals, like an anorexic daughter, often self selected to act out group issues with the tacit support of their extended family group. And then again when I came across 'social construction' with Ken Gergen and the idea that there was no independent concrete reality out there (or no need for an independent reality anyway), other than that constituted in languaging with others.

I think you capture the central issue well when you say: To sustain this understanding depends on the imaginative and coherent capacity to hold both the figural (local energetic configuration of space) and transfigural (nonlocal continuous depth/openess of space) simultaneously and dynamically (i.e. fluidly) in mind. One then 'sees' in the mind's eye the 'warm geometry' of a continually reconfiguring, variably viscous, dancing evolutionary flow of natural form as space in figure and figure in space' But it's not easy to know what this entails in a practical sense -- maybe you could devote more space to this 'how to go on' issue?

Best wishes
Keith

From: Alan Rayner [mailto:bssadmr@bath.ac.uk]
Sent: 15 March 2010 13:58
To: Keith Kinsella; 'Alan Rayner (BU)'
Cc: 'Jack Whitehead'
Subject: RE: influencing the educational social formation...

Dear Keith,

Yes, I can relate very much to what you say here. In terms of 'revelatory practices' I have to confess to being a novice! And maybe that confession is itself a revelatory practice.

As you allude to, somehow the revelatory educational role has to involve enabling people to reveal what is, has and always will be present for themselves. Giving instructions doesn't work. Trying to 'hint' doesn't work - as I found out the other evening in one of Jack's Monday evening conversations, such 'telling' practices tend only to elicit memories of hurt and resentment that block receptivity. All that I have found to be possible is to 'show/open the door' through showing 'what makes sense for me'. I have described this practice as follows towards the end of my current draft:

"But, to return to my question, I will offer this example. For the past ten years, I have taught a final year transdisciplinary undergraduate course at the University of Bath, entitled 'Life, Environment and People' (see my description of some of the turbulent and difficult history of this course in Rayner, 2006a). Every now and then as I present this course, which is participatory and invitational in style, I find myself having to stop and remind the students and myself about its fundamental intention. I say something along the lines of: 'this is not intended to be a course of instruction, but more an opening of possibility for your personal reflection and consideration by describing what makes sense to me'. I could say much the same about all of this paper. I feel the need to say it because I think that the expectation of instruction - and the painful memories of non-empathic schooling - that this can evoke and be read into what is offered, blocks receptivity.

I have simply to admit that I can only explicate my perceptions and reasoning for opening the door into natural inclusionality in my personally unique way, using whatever means I have available to me, and invite others across the threshold if they wish, where I will be pleased to welcome, help and engage with their enquiries as best I can. Whenever I forget to say or admit this, and engage instead with a perceived requirement or actual demand to convince others, I sense resentment and resistance rising within my listeners, and can all too easily become defensive and resentful myself. Maybe that continual reminder to 'hold openness' (Fig. 7) is deep in the core of an inclusional educational practice. Maybe this is why the unsolicited expression of how students see me shown in Fig. 9 means so much to me. Whether they realized it consciously or not, this simple image instantaneously expresses the natural inclusional nature of individual self-identity as a dynamic inclusion of its local and nonlocal neighbourhood, with darkness in and around all."

Once having 'revealed inclusionality for oneself', if that is what one has done, it becomes easy to envisage how the approaches you describe below can both help to 'open the way' and to 'clutter it up' depending on a person's background. This is why I think you are right in trying out diverse ways as you describe below. But in every case, an awareness needs to be developed as to how the 'cluttering' can occur through the multitude of defensive strategies that close the door again for fear of what might be let in through it.

I'll have to break off for now...but in the meantime, does the above ring bells for you?

Warmest
Alan

On 15 March 2010 14:25 +0000 Keith Kinsella kckinsella@btinternet.com> wrote:

Hi Alan

Yes, this helps. I think what you say regarding the 'open the way' vs 'clutter up' dilemma, definitely reinforces the need to 'hold openness'. I think Jack's idea about 'living contradictions' also is helpful here as in a sense, I/we are forever on the edge of plunging into such, as we risk in our interventions the other experiencing/choosing to take our responses the 'wrong' way. So what was meant as 'opening' is received as 'cluttering'; or how we offer the 'helpful' revealing perspective perhaps betrays a less helpful, more controlling intention - so it becomes an 'ouch' revelation to us!

Perhaps another way of looking at this then is to understand 'holding openness' as always being mutually revelatory so that we stay reflexive about our receptiveness cum responsiveness, and any re-calibration needed can take place immediately. I know I always feel at risk as my excitement at seeing and sharing new and more positive ways of appreciating and developing within a situation meets my desire (and belief) to hold back and help/let others find and own their own situated wisdom and the increased confidence that comes with this. This is particularly so with my youngest daughter who at 28 remains my most important developmental challenge -- probably more for me than her!

Best wishes
Keith

From: Alan Rayner [mailto:bssadmr@bath.ac.uk]
Sent: 15 March 2010 15:23
To: Keith Kinsella
Cc: 'Alan Rayner'; 'Jack Whitehead'
Subject: RE: influencing the educational social formation...

Dear Keith,

Yes, I can definitely relate through shared experience with what you say here! Except....should I reveal the difficulty I have with 'positivity' and 'owning'....

Warmest
Alan

On 15 March 2010 15:42 +0000 Keith Kinsella kckinsella@btinternet.com> wrote:

OK Alan, fair enough: 'positivity - ouch! (how about interesting/insightful/inclusional?); 'own' - ouch! (how about experiencing 'x'/feeling engaged by 'x'/becoming energized by 'x'/understanding their uniquely revelatory 'x'?)

Keith

From: Alan Rayner [mailto:bssadmr@bath.ac.uk]
Sent: 15 March 2010 16:03
To: Keith Kinsella
Subject: RE: influencing the educational social formation...

Excellent!

Warmest
Alan

PS Inclusionally I think of 'negativity' as 'receptivity' and 'positivity' as 'responsiveness' - they are mutually inclusive.

E mail sent on 31 March, 2010

Hi Alan

Yes, I like that: the splitting, either-or, and confrontational 'negativity versus positivity' as against the inclusional space/form of 'receptivity *and* responsiveness'...

I've been trying out my new 'i' lens (i here for 'inclusional') on various experiences I've had this past week, as well as other ideas, just to see how it works in practice. Here's some live examples which if you've time you might find interesting – not in themselves but in someone trying to make new inclusional sense of 'things':

1. I'm meeting with four managers in a small company that helps teenagers rejected by the 'system', to get a qualification and develop enough confidence and self esteem to re-engage with society. Three of the managers are talking angrily about how many new members of staff under fierce pressure of their new group of students, seem to be pulling back from their commitment to the ideals of the company, rejecting the training being offered, and not setting an example to more junior staff. There is a clear sense of 'them and us' during this exchange as they talk *about* the others. The fourth member who is not as senior has not spoken at all but has looked disturbed. When I ask him for his view, he talks about an experience he had with a group of these middle managers recently. He doesn't seem as articulate and fluent as the others, and instead of lots of words I hear him struggling to talk about experiencing high anxiety, anger and a sense of abandonment, and feeling overwhelmed and inadequate in the face of this flood of emotion. He is a highly trained counselor skilled in the use of the Tavistock approach to unconscious processes in group relations, and I can see that this experience has had a considerable effect on him - because in this instance, he hasn't separated himself from them; instead he seems to be talking from *within* the relationship/local space.

On reflection I think this is an example of inclusionality: because of his sensitivity/receptiveness and courage, he is able to 'see' the presence (or alternatively this is revealed to him) of strong emotions swirling about in the space they jointly occupy. While the managers (who were not physically present

at that event) see absence both within and between them and their staff, this man sees and experiences continuity of a kind which is overpowering

Here's another more personal example:

2. Prior to getting a second opinion about a possible heart valve operation, my wife undergoes a series of tests at a London hospital last week. All the staff involved are very attentive and encouraging, as they connect her up to various machines which generate pages of data and images. Little is said about these as the morning moves along, and we begin to think: why all these tests - you've had them already from the original consultant - why can't we just see the second opinion consultant? Later on a nurse asks if my wife would mind repeating the echocardiogram, this time under stress, as the 'professor' would like to have a look at her case. This takes longer with the professor asking for lots of different positions, and many pages of images being generated. And then with all the tests complete, we wait expectantly to see the consultant. He proves to be a very charming man who begins by asking some questions of my wife about how she feels and her most recent symptoms. He then says, much to our relief, that he doesn't think she needs the operation just yet; yes, the previous tests done in Brighton had suggested she should but he's very confident that the results the professor had achieved were more accurate. He then says rather drolly: 'would you mind if I listened to your heart?; probably no one else has done this yet - but I think that old fashioned methods sometimes are as good as any!' He then puts on his stethoscope and listens to the working of the valve. After a minute or two says: 'yes, having seen the results, that was what I was expecting to hear - and I'm happy to confirm my view: no operation needed yet. Let's see you again in 6-12 months.'

So where is the inclusionality in this? My feeling at the time was that when the experienced 'ear/mind-body' of the consultant was connected through the stethoscope directly to the workings of the mitral valve in my wife's heart, the true state of affairs or presence, was revealed. The earlier generation of large amounts of 'data' about the heart took place in a world where the heart and the various machines/technicians were seen as separate and discrete. The appreciation of just one complex multi-levelled piece of information/presence revealed through the stethoscope showed instead a relational continuity between doctor and patient. Following Polanyi, the 'end' of the consultant's ear/mind-body was not his ear but the end of the stethoscope, or even the mitral valve itself. So here, even in a top Western medical establishment, there is no separation, just a dynamic distinctiveness which can be experienced, when the conditions are right.

Here are some more:

3. Although I can swim 'crawl' reasonably well, I have never had any stamina at all even when I was playing first class rugby as was very fit. Eventually a few years ago I went on a weekend 'learn to swim like a fish' course because I was intrigued by their approach. I won't bore you with the detail of the weekend suffice to say that I started the event 'swimming uphill' with head high in the water and strokes being devoted more to keeping myself afloat than making forward progress; and by the end was swimming in a more horizontal position,

using far fewer strokes to cover the distance, and much more relaxed allowing the water to support me.

The key change for me here was recognising in an emotional whole body-mind way that the water and I could have an enjoyable and mutually supportive relationship – just like a fish – with less of the usual sense of separation with me fighting ‘it’ as a separate entity. Instead I can now see/feel that the water (space) was a dynamic presence between me and the walls/floor of the pool, supporting me and allowing me slip easily through the water ahead.

4. I’ve long been interested in ‘body-mind’ approaches to health, studying amongst other things, chi gung, shiatsu, and Feldenkrais. The latter is a skeleto-muscular approach developed by Moshe Feldenkrais, an Israeli physicist/martial artist who in healing his own serious knee injury eventually developed his own methods. In essence his approach to healing involves people in re-learning to use their skeleton and associated musculature as efficiently as babies do. Instead of turning a discrete ‘neck’ to look at something, or using a discrete ‘arm’ to pick something up, the whole skeleton/body needs to act as a whole in harmony in the movement. So for instance, turning the head to look to the left, might start with a subtle initial movement in the right buttock and continue in a smooth and effortless way through rib cage, shoulder, neck, head, and then eyes.

I had a series of treatments a few years ago to relieve serious pain in my sacro-iliac/shoulder blade/neck area. What the practitioner did for the most part was to gently remind parts of my body, particularly my rib cage area, that it had a role to play when I moved my ‘arm’ turned my ‘neck’ and so on. Because I hadn’t ‘used’ this area for years, it had in a sense ‘switched off’ leading to strain and eventually pain in the ‘discrete’ parts. Almost like a miracle, much of the pain disappeared in one gentle treatment of 45 minutes, as the essential continuity between so-called ‘parts’ was revealed, largely at an unconscious level. Of course my habits were of a long standing nature, so more (revelatory) ‘awareness raising’ was needed! But I can now see what the practitioner has been doing is assisting me to appreciate the presence of the continuity that exists within my body-mind in its dynamic context – sitting on a chair, standing and talking, walking through a doorway, and so on.

At a more academic level, I’ve been reading John Shotter’s latest view of his embodied version of social construction, there are several themes that seem to have a family resemblance:

5. In talking about Whorf’s work with the Hopi, he indicates that they do not have an ‘imaginary space’ where we Westerners keep a whole set of mental surrogates that we ‘perform’ on as e.g. when we ‘plan’ to do something in the future. Instead the Hopi ‘prepare’ themselves for this event in an ontological way, and expect that these very preparations will ‘traffic’ with and ‘impress’ the things they are thinking about, and so have real consequences in the future. In other words they experience a continuity between their ‘thoughts’ and the ‘objects’ they think about – there is no separation. Similarly, much of what we Westerners experience as a part of ‘ourselves’, as an aspect of agency under our own control, Lienhardt reports that the Dinka experience as a *presence* in their surroundings, acting upon them from without – as though they are

embedded in an ethos and there is no separation between 'inner entities' and the contexts they live in. Further, in examining the work of Merleau-Ponty and Wittgenstein, he talks about 'embodied, relational, expressive-responsiveness' and the 'unfolding of living processes' which exhibit 'developmental continuities' and 'identity preserving' changes in their unfolding, which are 'already there' in their beginnings. He also suggests we can start to consider a 'move' to an 'orchestrated indivisible world' of 'invisible presences', which can have influence and 'agency' upon us.

Again I get a strong feeling from the words he is using, that I could be reading about 'inclusionality' here, and that the various 'orienting' moves that Wittgenstein recommends - so we might better 'know how to go on' with our living together with others - are in some ways similar to my 'responsive repertoire': 'reminders' to notice in our utterances, unnoticed details in our surroundings (?presence), and to influence expectations regarding our anticipations, and to 'show'(?reveal) possible connections to (?continuities with) our circumstances.

6. Finally I offer an example of something I wrote for a chapter in an edited book about 'systemic practice' published last year. It was how I saw what partnership working meant and how it was created, based on some development work I'd done with a local strategic partnership in West Suffolk. Reading a 'blog' version of it now, I feel it has the spirit of a more inclusional way of thinking about it, prior to me understanding much about the concept. I haven't as yet tried to adjust the words or anything, so there will be ideas and words that are from another epistemology I'm sure. Because it's quite long I've attached it.

If you get some time to skim through these ramblings at some stage - is this making some sense?

Best wishes
Keith

From: Alan Rayner (BU) [mailto:a.d.m.rayner@bath.ac.uk]
Sent: 01 April 2010 10:23
To: Keith Kinsella; 'Alan Rayner'
Cc: 'Jack Whitehead'
Subject: Re: influencing the educational social formation...some more thoughts

Dear Keith,

Yes, this all makes good inclusional sense to me. All the examples you give, as well as your writing about 'systemic practice' have a very strong flavour of inclusionality about them, notwithstanding some of the 'pre-inclusional', 'connectivistic'/'holistic' language of 'wholes' (as distinct from inclusional 'holes') and 'material'/'fabric' networks (as distinct from networks of fluid channels or 'flow-form networks' as in Karen Tesson's PhD Thesis).

Your story of your wife's cardiologist also has strong echoes with a current conversation I/we are having with Robert Sardello (author of 'Silence') about

'empathetic resonance' and its relation to 'transfigural geometry'! Cf attached poem.

Great!

Warmest
Alan

Sent 1 April, 2010

Hi Alan

Thanks for your comments – I'm encouraged I'm beginning to get 'it'! I'll look again at empathetic resonance with my wife's example in mind this time. Thanks also for the reference to Karen's work*. Jack did mention her work some time ago but this time I'll have a proper look at it to appreciate the different perspective/language involved in flow form thinking as against my current more connectionist view.

I like the interfacing inner-outer receptive-responsive flow-form 'ontology' of the poem...

The sun has come out here at last but there's biting wind – so a cool Easter weekend largely indoors with my wife's two grandchildren I think, with just a brief excursion to search for chocolate eggs hidden in the garden. Maybe with their unclouded better feel for presence, they'll find them quickly!

Best wishes
Keith

* <http://www.actionresearch.net/living/tesson.shtml>

APPENDIX 19: E mail note to Jack Whitehead: A Pedagogy of Presencing? 11 March, 2010

Sent: Thursday, March 11, 2010 1:37 PM
From: Keith Kinsella
To: 'Jack Whitehead'
Cc: 'Alan Rayner'
Subject: RE: influencing the educational social formation...

Hi Jack

Here is the first note -- I could write more but I feel that my thinking could do with some feedback before I go too much further. I've copied Alan because much of this is emerging as I 'indwell' inclusionality and tacitly work on what Polanyi refers to as the 'from-to' structure of tacit meaning making. Of course writing this makes me realise in using this 'from'--'to' phrase, I'm not operating from within an inclusional frame...but that's what he said then! Part of the developmental challenge is finding ways of using 'old concepts' like this in new ways - and the languaging to describe this!

Best wishes
Keith

EXTRACT - Some reflections on 'inclusionality': how I might use it...and it might use me!

Since the brief but encouraging interchange of e mails with Alan Rayner last week, I'm been engaged in the process of 'indwelling' (Polanyi). I'm exploring, experimenting and implicitly embodying various aspects of Alan Rayner's new concept/value of natural inclusion, which I see as his own 'punctuation' (to use a Batesonian term) of the evolutionary process. It's certainly exciting but just how useful will it be to me in my life, and more narrowly, in helping me complete my thesis this year?

As part of this process I've been trying to get a better understanding of his view of the concept through reading the ALARA keynote draft, and seeing how CARPP students like Graham and Jekan have used it in their work. I've also been using it to play around with frames and tools that I originally developed using a more 'connectionist' view (Varela) of ontology, in particular my 'becoming-in-relationship' view of ontology and the multi-frame 'systemic presencing' model that has informed my way of working with student learning logs. These reflections have also led to a number of other reformulations and it's clear that inclusionality could well have a generative influence on my whole thesis.

Systemic Presencing

Let me look first at the outline 'systemic presencing' model that I originally created when writing a chapter for a book on systemic practice (see Appendix 11 here for original note) The basic idea then was that I had in my backpack a range of perspectives which I had used personally in an intuitive and improvisatory way to improve my understanding of living, and which I could also use to broaden/deepen the way my clients looked at things. My interest in all these ways of looking and talking seemed to have been concerned mainly with revealing what has been marginalised for whatever reason. At the time I thought of these perspectives as casting new light or surfacing things that perhaps were not immediately obvious and, influenced by Foucault's work,

that in a sense had been marginalised or subjugated by dominant discourses of various kinds. The metaphor I had in my head was of these perspectives as a series of ‘rings’ around the ‘world’, each providing a different perspective which could be ‘called forth’ in particular situations.

How do I now regard this approach ‘post inclusionality’? In talking to Alan about how I now saw my coaching role, I used the term ‘offering dynamic connectivity’. And I suppose what I was thinking when I wrote to him was about helping people ‘close the gap’ between one thing and another, like ‘theory’ and ‘practice’ or ‘development’ and ‘performance’. He pointed out that this implied ‘rupture’ between the two, and a more inclusional phrase would be *dynamic continuity* where the apparent presence of absence between so-called ‘discrete’ objects, is *not* mistaken as an absence of presence. So instead of describing what I do as, in a sense, ‘importing’ new knowledge to close a gap, I’m now thinking that what I do can now be framed as *revealing presence*. So e.g. when I ask a ‘systemic’ question about say the effects of an action in one part on another part (in order to help a person make a new ‘connection’ and so ‘relate’ differently), I’m now thinking that what I’m doing is helping the person (and myself) notice something that could have always been there i.e. a previously marginalised, subjugated and unnoticed aspect of *continuity*, that relates his/her ‘figure’ to his/her local neighbourhood, and further to other local neighbourhoods in the infinite omni-space. (added later) So what I’m doing has a ‘revelatory’ quality about it showing how ‘things’ previously seen as discrete/different, can also be seen as dynamic aspects of the same process: hence my notion of ‘close learning’ - where ‘development’ and ‘performance’ can take place at the same time; and the concept of ‘presencing developmental possibilities’ where the coaching conversation frames developmental ‘next steps’ as it seeks to clarify, challenge, support, and/or offer new ideas.

Because in the online space of e learning, I cannot myself see/hear/feel what is in the client’s situation, any questions, challenges, and proposals have to be co-creative and improvisational in intent: he/she has offered me some kind of clue, I have responded, hopefully in a receptive and responsive way, and he/she will then offer some kind of ‘closure’ by their next move in the ‘conversational triplet’ (Barnett-Pearce). And then we continue in the dance. In some ways what I’m doing may be similar to what Graham van de Tyl refers to in his thesis as ‘fluidising boundaries’ – as well as often reframing the situation, my interventions have the effect of evaporating them, or at least making them fuzzier and more permeable, what previously seemed a solid boundary or gap (if a gap could ever be termed as solid!). Is this a justifiable reframe or am I deceiving myself?

Coaching as a co-created ‘becoming’ ontology

In thinking about my ontology/epistemology in 2007 I came up with a new formulation of my ‘searching for roots in the future’ idea which brought it into the present and made it more clearly an ontological and relational idea through introducing the idea of ‘becoming’ in interaction with others – so a ‘rooting in the present’ (see fuller transcript in Appendix 2). In his feedback recently Alan has made the point that I should be careful not to isolate the ‘being’ from the ‘becoming’ and instead view the process as one where we can “*understand the ‘present’ as a dynamic inclusion of ‘past’ in the coming of ‘future’*” (Rayner, 2010). This view definitely resonates with my understanding of the presencing process, and so I’m now thinking that I could call my ‘rooting in the present’ as an inclusional process in the sense that is relational, responsive, and improvisatory, and that my complex self and those of others I’m

working with, are being formed at the same time as we presence development opportunities for ourselves; and so, using the Scharmer formulation, embodying desired futures in the present. And this presencing we do together I now see as potentially 'inclusional' because in the 'rooting' identity forming work I'm doing, I'm trying through my various responsive interventions, to reveal potential 'presence' in our local and non-local neighbourhoods in different ways. So might I be able to defend the claim that this is a *coaching pedagogy of presencing*?

The artefacts of research

In framing the outputs/artefacts from the this pedagogical process with my students, in particular with J, and the subsequent work done with Jack on video clips, I am beginning to see things in a different light. Previously I was framing these three outputs in terms of different types of influence over time i.e. short – 'fleeting moment', medium – 'development episode', and long – 'reflexive biography'. Though the time factor is still very present, I'm also now, following inclusionality, looking at these in terms of different kinds of dynamic spatial relations. And there are now four:

- The most immediate are the micro-interactions/fleeting moments that are shown ostensibly in various clips from the Wallace interview and face to face sessions with Jack. These demonstrate various aspects of how I go about 'presencing development opportunities' for myself and others as I practice my living theory. Using the rich evidence these examples provide, is it possible to capture and represent the life affirming energy and subtle dynamics of mutual influencing as we learn together in what might be termed a receptive and responsive inclusional space?
- Looked at over slightly longer periods of days/weeks, the 'development episodes' of apparent resonance/direct influence captured in learning log/essay texts, offer some evidence into the impact, amplification, and extension of particular online 'interventions' into local contexts. These illustrate the difficulties of making strong claims about '...knowing what what I do, does' (Foucault), but using the inclusionality frame, could we see these as examples of coaching interventions as *revealing continuity* in a generative sense: the initial intervention reveals another way of looking at relationships (or using Wittgenstein, as creating a new language game?) with others and as this perspective is tried out and elaborated with others, more of what is potential and present in the receptive space between distinct complex selves, is revealed to the coachee and his colleagues?
- Over periods of several months, it's possible to imagine the creation within the coaching relationship of an ongoing learning climate/space which stimulates/supports interactions which constitute an inclusional learning/development space where our complex selves or local neighbourhoods are able to relate in more dynamic improvisational ways. At this 'level', we are looking at the meso-behaviours – what I've called my 'responsive repertoire' - embedded in my written formative feedback in logs and essays, which translates the 'systemic presencing' perspectives into 'textual actions'. What kind of overall effect can this produce in terms of 'revealing presence' (by perhaps 'fluidising boundaries') and so 'presence developmental opportunities'?; and in what ways is it possible to stimulate the development of a range of meta-qualities or 'ontological skills' (like 'resilient, receptive, rigorous, responsive, relational, and reflexive') that help students perform *effectively* in what Barnes has called an era of 'supercomplexity', and so influence the social educational formation?

- Finally what kind of development is possible over the full 18-24 month period of study given the effects of these various influences over shorter time periods against the ‘hustle and bustle’ of everyday life? Here at a macro level, to what extent we can capture and identify the longer term effects of a more ‘systemic’ and inclusional coaching approach that focuses on presencing developmental opportunities - as embedded in the ‘reflexive biography’ of the student created through their reflective essays and further reflections on these (and as I too develop further the narrative of my own learning)?

There’s more bubbling away but let me pause at this moment and seek some feedback.

APPENDIX 20: Video from Supervision session with Jack Whitehead: KK outlines the thesis, 2010

A video clip in two parts, showing KK outlining his latest thinking of the thesis at the start of the final supervision session held in 2010. The two video clips are introduced and presented in the body of the text so this entry is here just for consistency



<http://www.youtube.com/watch?v=UmEBdldG5c4> –*KK presents thesis, part 1*



<http://www.youtube.com/watch?v=x7a9ur5nZUk> - *KK presents thesis, part 2*

APPENDICES TO CHAPTER 3

APPENDIX 1

What can we learn from studying exemplars of embodied practice?

But enough of this self-regarding wordiness! Let's look at what this might mean in practice *and* what prospects such a view of performance (and the implications for development and facilitating development), might mean in the target context of leadership development on the MA in Leadership Studies. Here I offer a short video clip from one of my singing lessons which I think, amongst other things, provides a clear example of what embodied performance means, what is involved in achieving such states, and the close and creative intermingling between dialogic and bodily processes. It also I believe shows the activity of the presencing of developmental opportunities clearly at work, and the inclusional nature of the teaching/learning process. This clip (one of five) shows my teacher Carol working with me on the challenge of singing smoothly through a musical phrase, which is the basic and central element of an engaging and successful singing performance.

I first offer a brief video clip of me first singing the song '*ruddier than the cherry*' - before Carol begins working with me on my approach. I've practiced the song at home a few times and this is my first performance of it at the start of the lesson.



5. ruddier than the cherry

<http://www.youtube.com/watch?v=zfYGd63OYbs>

What impresses me in seeing myself in this clip is the extent to which I seem to be taken over, even 'possessed' (Wittgenstein, 1958) by the singing process. Once the piano accompaniment starts, all my attention and 'bodied' resources like breathing, voice production, facial expressiveness, gestures are fully engaged, and I can't seem to step off the roller coaster. Carol herself also seems fully engaged in the process. And the pure pleasure for us both as I catch my breath at the 'bridge' before the minor section. Wow, the power of the master Handel!

The next video clip shows us working on producing a more legato line – the main focus of this lesson – in what I called 'speak vs sing emphasis'.



6. 'speak vs sing emphasis'

<http://www.youtube.com/watch?v=kyrGD3o5pH4>

In this clip I start practicing the first two bars trying to link the words together. Immediately Carol picks me up with the word 'ruddier' which happens a lot in this piece. She offers 'yet another thought to take on board' – to say that though in speaking we emphasise e.g. the 'ru' in ruddier, we *don't* in singing legato: the weight should be the *same* on each syllable with the intervals between notes providing the emphasis. There's a moment when we both 'collapse' in a burst of laughter as I realise how obvious this point is and demonstrate it (at 0.42). Handel the composer has *already* taken care of dynamics/emphasis. Carol then seeks agreement on how to pronounce 'ruddier' (rud-yer or rud-i-er) and as I sing this too carefully, she asks for courage in delivery – like in swinging the golf club, there's always something else to remember! In typical 'presencing developmental opportunities' vein I start to explore and reflect on possible aids to monitor the intensity/degree of emphasis on syllables in order to notice and keep this 'level' when e.g. Carol is not there: I *don't* notice the '**ruddier**' emphasis as I use it in speaking! We both play about with over-emphasising our speaking to make the point in a humorous way – '**no-**tic-ing as against no-ti-cing – why it's '**ob-**vious!'. This builds on the earlier point and leads me to realise in passing that it's like 'putting on a different set of spectacles – there's no need to emphasise as it's already in the music – 'Handel's a clever chappie and he's already done it for you'; and jokingly admit 'it's not German, it's not French - it's a new kind of language, and it's called *singing!*' I also realise that this song is 'particularly challenging' in regard to delivering a smooth vocal line, and so progress here will help with 'easier' songs like 'Ombra mai fu' – 'it's on a plate' - so motivating me to 'do better'!

In terms of process...

There is very dynamic yet co-ordinated interaction with both of us taking our turns to speak and sing with little overlap/interruption, and with the meaning of what we are doing, seeming to emerge from a lively dialogue which mixes humour, serious talking, demonstration, practice, and feedback. Due to the high level of rapport which allows both of us to 'let go' and be natural, and the intense level of feedback both vocal, gestural, and in words from Carol, I'm able in a short space of time to improve the way I'm uttering quite a difficult phrase. I'm surprised how difficult it is for me to hear/get a reading on what she's hearing in order to re-calibrate my physical delivery, and need her continuous close feedback on how it ought to be sounding, to make the adjustments.

I'm also aware in looking at the clip of the many 'subsidiary' elements – to use the Polanyi framework – that are brought into play for me to correctly utter the 'focal' phrase in a more legato manner. These include a relaxed posture, control of diaphragm breathing, seeking purity of the vowel/diphthong sounds, keeping an open and relaxed throat ('yawn'), and producing a consistently resonant sound on both low and high notes

– the ‘ping’. Without these elements, it would be impossible for me to deliver a convincing rendering of the musical phrase in question. And of course there is also the issue of the interpretation of meaning which, as you can see from Carol’s gentle sarcasm, requires more attention to the composer’s ideas and design than my usual tendency to overemphasise certain words!

There is also a lot of *gestural* (especially by Carol) and *tonal* work to get across or get the feeling of what is needed, and a ready and spontaneous sharing of various little ‘games’ to show we share the various meanings that are emerging. I can also see how closely Carol attends to the points I make – like the one on assessing intensity (at 02.08); how receptive and responsive she is in acknowledging the point – ‘how can you stop doing it?’- and how I am enabled to anticipate and respond to this instantly. I also notice how I’m trying to get a *bodily* feel for the work I need to do, practicing smooth ‘horizontal’ moves with my arm, loosening my jaw/opening up my throat, and so on, so I am ready to ‘body forth’ (Merleau Ponty in Shotton, 2008) my learning in the moment.

* * *

What does this clip tell us about the nature of embodiment, the development challenges involved, and what new ideas, if any, this might bring to the leadership development table? I believe the singing lesson provides an excellent illustration of what it means to learn to be a particular kind of person in a context in an exchange - in this instance learning to become a singer. Because it is essentially what Ong calls a situation of *orality* as against literacy (Ong, 1982) you can see what it takes to learn something and to see/know when it works – it’s all there in front of you. In the tight domain of a singing lesson there is no escape and in contrast to ordinary life, I do know what what I do, does! And I also have the opportunity to take responsibility for the outcomes/consequences, and do something about these to the best of my ability, aided by my teacher. The clip also demonstrates inclusionality at work, and how presencing in the moment can aid the development of the ontological skills needed to know how to go on – in this case how to deliver a smooth but expressive melodic phrase, allowing the intentions of the composer to be re-animated for singer-and-audience for ‘yet another first time’ (Garfinkel, 1967).

But can’t we use this way of framing and looking at performance and development to other roles we need or choose to perform and that are situated and timely in nature?; and where we normally don’t realise we need to put in this sort of effort, or have this sort of coaching at hand? So we muddle through – and here the English idiom aptly captures the nature of the activity – and focus mainly on the ‘what we do’, and when challenged, perhaps the ‘why we do it’; but implicitly, we make sure that everything else remains ‘rationally invisible’ (Garfinkel, 1967) to us and others so the resulting situation appears as a ‘given’ (Wittgenstein,) which we have no responsibility for – another legacy from the Enlightenment. Also because we can’t get the kind of focused feedback and demonstration of what would be ‘right’ in any specific interaction, our learning tends to be very hit and miss, and because we ‘don’t know what what we do, does’, using feedback as the basis for improving practice is very tricky. So this is the challenge facing leadership development programmes – how to help people develop the ‘inwardness’ and ontological skills that are needed to do the job ‘in a context’ and ‘in an exchange’ – and the challenge to anybody seeking to help facilitate learning and improved performance.

What the video of the singing lesson shows is what is involved in learning how to perform a situated, embodied, and in the moment role, in an interchange in its surroundings; and how to develop the relevant ontological skills i.e. navigating, relating, engaging – in finding out ‘how to go on’. These provide an exemplar for what might be involved in learning how to offer leadership in an organisation, and be convincing in the role. This raises the challenge to see how this might be applied effectively to a less clearly contained, visible, oral, and harder to assess activity like leadership, and clarifies the conditions/criteria that a development process needs to meet.

So with this perhaps unusual and provocative view of the leadership development challenge – as I see it now after some 7 years in the role – how have I gone about addressing the question I’ve been using to guide my action research: *‘how do I improve my practice as an online coach on the MA in Leadership Studies helping mature students self-educate and develop their ontological skills to be able offer leadership more effectively in a world of ‘supercomplexity’, to themselves, others, and in the social formations they live and work in?’*

APPENDIX 2

HOW HAVE I MADE PROGRESS IN MY COACHING PRACTICE?

I would like to talk about the development of my action research practice in *three* broad phases which cycle dynamically between action and research in an *inclusional* way, the emphasis being more on action in the earlier phases and with research more foregrounded in the latter, but with each inextricably entwined in the other throughout the period. This offers a useful distinction in terms of what I was foregrounding for a time but should not be seen as suggesting that ‘action’ and ‘research’ are in any real way separate from each other – each reciprocally informs the other.

- The first phase was about me finding my feet and basically learning *with* the students how to go on in the coaching role, with very little guidance from the Centre or colleagues. This includes my self study writings and also the formative work on the MA i.e. integrating research in phases, criteria for marking essays, embedding formative feedback in student writings, and so on. So mostly about the *doing* – which has continued of course, most notably with the re-design of Phase 1 in 2008.
- In the second phase I started to take more of an interest in researching what I’m doing. So the surfacing of various features of my pedagogic approach like a *responsive repertoire*, identification of *fleeting moments*, the *development episode*, the *reflexive biography*, and the emergence of the idea of a *learning relationship* or *development container*
- Building on the learning in the first and second phases, the third phase has been driven much more by my research needs with more active involvement of a number of my students in what I’m doing. There is also the start of exploration of criteria of progression which relate to an *ontological* standard of judgement, looking for confirmation of working hypotheses from engaging in a *third kind of knowing* (Shotter, 2008), and seeking feedback on my ideas from other Exeter colleagues and fellow PhD students at Bath.

Though here I separate the activities of ‘action’ and ‘research’ for explanatory purposes, I see them very much in a flow form relation as defined here: ‘...recognise all natural form as *flow-form*, an energetic configuration of space in figure and figure in space (Shakunle and Rayner, 2009)...this logic moves on from opposing ‘one’ against ‘other’ or ‘many’ through their mutual exclusion of space to *including each in the reciprocal dynamic influence of the other* through their mutual inclusion in and of space.’ (Rayner, 2010). And further, though they are not directly linked, I think you’ll be able to see that these phases have some clear association with the epistemological transformations I mentioned at the end of Chapter 1.

1. Finding my feet as an online coach

When Donna Ladkin, an academic member of staff of the Centre, and I first took on the role of coaches on the first offering of the online programme in 2004, she was very much of the view that this would not work well, as she felt quite strongly that face-to-face methods would have a far greater chance of success. In the six years since then, it has become clear both from the fact that nearly 50 people have now graduated, and from informal student assessment and feedback over the period, that not only is this possible but also an effective way of offering this kind of education. But how does it work, and

how could it be improved? Again the Leadership article first drafted in '06 but not published till '09, provides some early insights and propositions in response to this question based on limited, informally collected evidence suitable for a preliminary study of this kind.

When I first started being an online coach in 2004, I didn't have a thought-through or set way of working. Although in my facilitation work I'd often provided one to one help for senior executives, I had never done formal coaching as such and so I found myself responding to the learning logs and then the formal essays in quite an open, exploratory 'take things one at a time' basis. As Marie Huxtable admits in her own thesis (Huxtable, 2010), I 'didn't know what I was doing or why, and I didn't know how to assess my effectiveness'. The MA programme director at the time, Peter Case, gave me a free hand and I just started trying to be helpful, finding my way and 'how to go on' (Wittgenstein, 1958) very much as the students found theirs (I initially had eight students to 'look after'). As time went by I started to develop some patterns of responding which I later found to be contingent to some extent to the phase of the programme and/or the attitude of the student, and/or the issue being presented. I also started to discover what particular students seemed to find useful and what issues they wanted to work on, whatever the content they were studying at the time. I started to get curious about these emerging patterns between us, and in the second year, encouraged by Donna, carried out some initial interviewing of a sample of the students who at the end of 18 months of study, were coming towards their dissertations.

I was surprised and encouraged by the results of these informal discussions: the programme seemed to be working in a much more 'constitutive' manner (Grint, 2000) than I and Donna had thought possible, and as coach, I seemed to be playing several important roles in the process. For example from my notes at the time (see Appendix 5):

- Recognising, supporting, affirming student's explicit and tacit knowledge
- Challenging and casting doubt on conventional understandings of ideas/models
- Provoking new perspectives through questioning and reframing
- Broadening, extending, and deepening through offering new ideas/resources
- Offering ideas to do with organising for action and assessing impacts

I also began to appreciate how the marking/grading of the formal essays was being carried out, was having an impact - I will comment further on this in the next section.

The article reporting on our initial study of the working of the programme and subsequently published in Leadership, made the point that it did seem possible to transform what on the surface seems 'distant' learning into something much closer to home and work practice. The evidence for this claim was mainly impressionistic in nature, and so one of the actions I took was to look far more closely at the foundational data – the learning logs and essays – and to see to what extent these claims could be supported. And more importantly, being a practitioner rather than a researcher at heart, just how influence of this kind was being accomplished in a largely virtual relationship. I initially started collecting personal examples of possible influence from my student logs – what I called 'fleeting moments', a phrase in an article on a process view of leadership written by an Exeter colleague, Martin Woods (2005), which had 'flirted' with me (Mindell, 1995). Though obvious examples of these were few and far between, they nevertheless did seem to offer enough support to encourage further inquiry: students raised specific issues, directly or indirectly, in their learning logs – I responded as insightfully as I could – and they seemed to find my responses useful. Encouraged by this and other forms of informal appreciation, I decided to focus my self study very much on this aspect: what kind of contribution can an online coach make on a distance

programme concerned with a situated and timely practice, and how is such influence achieved?

As mentioned earlier, during this first phase I also involved myself in some practice improvement work which I later realised was to have a formative on the MA . I wrote this work up in several internal papers covering what I felt to be important aspects of how the MA was being managed: the idea of integrating research methods into all the phases of the programme rather than just the final phase; developing a clearer set of criteria to guide the marking/grading of formal essays, and proposing that we use a range of more formative methods of assessment within the university's grading policy. I also found myself exploring two other coaching practices which at the time I didn't write up as formal papers as I didn't experience them as unusual. These were the move towards the personal 'tailoring' of programme materials to suit the needs of particular students both in terms of content and timing, and the inclusion of feedback on essays and logs of a 'stream of consciousness' nature that was *embedded* in student texts. I will comment very briefly here on each of these but will leave more detailed discussion till Chapter 7 when I bring all these features together as part of a personal working 'pedagogy of presencing'.

Integrating research methods:

I could see at the end of the first cohort in 2005 that avoiding any exposure to research methods until just before the dissertation did the students no favours, giving the false impression that 'research' was something separate from 'studying' and 'practising' leadership, and allowing them no time for choosing and using methods before they started on the dissertation proper. I wasn't aware of inclusional thinking at that time (Rayner, 2010) and so restricted myself to writing a position paper in 2006 for the new Director, Donna Ladkin exposing and explaining my thinking at several staff meetings (see Appendix 3). As I say in the paper:

'We both have ambitions to create a higher degree pedagogy and programme that aspires to the ideal of 'close learning' and is therefore particularly suited to supporting inquiry and learning from practice. A necessary part of such an approach is to view students as 'practitioner researchers': experienced people who become better at what they do, in this case leadership, through studying their own and others' practices, as much as by learning from the ideas of the Academy...As things stand, students have to learn to use the methods *as* they do the dissertation, which doesn't seem sensible if we are looking for quality work. It would be better if they were practicing these skills in some way throughout the 18 months before the in depth research. It also in a sense 'wastes' many potential micro research opportunities and ideas occurring during the first six phases of the programme – or at least these ideas lie fallow for a long time before the dissertation.

Though Donna warmed to the idea, no further progress was made on this until only recently when the idea was adopted by Scott Taylor, the current director, and he and I began introducing research methods into the revision of Phases 1 to 3, carried out during the latter half of 2009.

Apart from bringing a research attitude/methods more clearly and quickly to student attention mentioned earlier, I realised that there was a good deal of 'discretionary space' available at the margins of how the programme was delivered. Some of this led to

outcomes which I felt were problematic – like e.g. the marking process used to assess the formal essays

Developing criteria for marking formal essays:

Though there was a formal set of criteria set by the university for marking work, and we as a group of coaches had had some meetings at which we looked at our marking standards, I felt that the marking process was problematic and did not look forward to deciding on final grades for Phase essays. To deal with these tensions, I decided to develop a more detailed marking schema and offered this in a paper to the coaching group in 2007(Appendix 2). During this time I also became more aware of the differences between summative and formative feedback and marking, and became aware that it was the ‘summative’ aspects that I was most uncomfortable with: helping students with developmental issues was fine but deciding their essay was worth 58% or 62% was altogether another matter. I realised I felt the programme was more about supporting development of effective practice in the ‘real’ world. The paper I presented on adopting a more formative approach to assessment paper to the CLS staff group appears in Appendix 4.

Other outcomes of the ‘discretionary space’ at the margins which I was able to exploit were more positive in nature: here are two.

Tailoring the development experience:

Though everybody received the same materials each week with the same exercises and questions, my realisation that there was a good deal of ‘discretionary space’ in how the programme was run, allowed me the freedom to respond much more personally to my students. This was not a deliberate step on my part, at least not initially as I just found myself responding in different ways to the different things each student offered me in their weekly logs, providing new readings, suggesting different ways of approaching issues, bringing forward materials from later phases and so on. Later on I began to make this a more strategic tool by saying to students: ‘frame the MA experience not as an end in itself but as an opportunity to work on the issues that will enhance your life - and I will help you do this’. In this way I created a different kind of learning contract with students which encouraged them to be more personally demanding and clearer about what they wanted to work on and how. Through varying this ‘mix’ in response to student abilities and needs, it has become possible to in a real sense personally tailor the MA experience to each individual.

Embedding ‘conversational’ feedback:

In the asynchronous world of learning logs we inhabited, I discovered that my students were having some difficulty in understanding the feedback they were being offered in logs and at the end of essays. I too was having difficulty writing the usual end of essay summaries which needed to justify a particular grading. So adopting a practice I’d noticed Judi Marshall used, I decided to start embedding my passing thoughts as I read the essay/log right in the student’s text where they arose. My remarks would be entered in a different font colour/highlighted so easy to recognise – and so in a sense, the student’s immediate text provided the context for each remark, and therefore in theory would make it easier for the student to know what I was referring to. This certainly seemed to be the case, and in checking the idea out afterwards with several students, I discovered that they actually imagined me ‘talking’ with them when they read the comments – so despite being asynchronous, more ‘conversational’ in impact! Here is an example of what I mean:

With respect to the other aspects of the model, Julie's observations clearly indicated that my strengths were on the leadership rather than the management side. what did she observe that 'clearly indicated' this?; would say an ISTJ type have made the same comments from such observations?¹ This has made me reflect that I am perhaps too people-focused at the expense of operational outputs. In a social enterprise that has to turn a profit to survive, I was surprised at Julie's fear of having to make one or more people redundant. But I see myself in this position too, bending over backwards to look after every person in the organization where there is clearly efficiency to be gained by privatizing, rationalizing or otherwise reducing capacity. This is a good bit of reflexivity, using an observation of the other as a stimulus to query your own values I described this in my notes as both Julie and myself having an over concern about our staff. Of course a balance has to be struck but our comparable styles make us both over-sensitive to a more ruthless and arguably more sensible approach to the business operation. Can you imagine what a more 'balanced' (or if you like 'ruthless') approach to the dilemma you face might look like – and what shifts this might require in your decision-making style?¹

2. Improving my understanding of the nature of educational interaction

Though I now see 'leadership' as being about *framing/relating/orienting* in order to know 'how to go on' together with others, during these earlier years I thought my role was more to do with improving students abilities in *problem solving* - more typically seen as a 'management' function - and increasing the know what and know how needed for this (Kotter, 1996). So during this second phase of developing my practice, I decided to look more closely at my interactions with students and find out to what extent and how I was working at this. And this meant looking at the extensive and rich textual record captured in the weekly learning logs and termly essays, and seeing if I could tease out any patterns or get some glimpses of the kind of influence I might be exercising in this virtual world. In this section I will cover what I found/made in six sections: *fleeting moments; development episode; systemic mindset; responsive repertoire; learning relationship/development container; reflexive biography*. These comments are of a preliminary nature as I will deal with each of these working hypotheses in more detail in the chapters that detail my 'findings' from the research.

Fleeting moments

In passing I'd already noticed some evidence of influence in what at the time I called 'fleeting moments' influenced by the use of the term in Martin Woods paper on 'misplaced concreteness' (Wood, 2005) By this I meant finding in one or more learning logs/essays a specific comment on something I'd said which the student recognised as having had an immediate impact on their thinking/behaviour. I discuss the concept and a number of these in detail in Chapters 4 and 5 but to give you a sense of what I mean, here's an example of an interaction in a student's learning logs spread over a period of a few days:

KK comment: Perhaps, rather than using the combative tactics that have served you so well over the years on your climb up the hierarchy, it might be more effective to support/guide and demand more of these more rational/technical efforts of others with less experience than you. Don't fight them - ask for **more and better** so that your intuitions can be tested against so called 'harder' data. You

might see this as 'compensation' but equally it could be seen as shrewd use of your unique talents.

Three days later...

Student response: Thanks for that comment. I can see that asking for "more and better" is a tactic I can productively use now. I have been asking for this but in a negative way rather than a positive one - by reversing the negative psychology here the whole atmosphere could be far more productive and beneficial to the team.

I had raised this kind of thing as evidence of possible influence as early as 2005 with Jack Whitehead. He was positive about these potential 'glimpses' of influence, and in line with his own practice, encouraged me to more clearly take responsibility for what I was doing, by looking for further evidence of such influence in my students work, and their own influence in their work with staff.

Though I continued to do this as and when I noticed such glimpses/connections, these 'moments' seemed to be few and far between, and not sufficient to support the kind of argument I was beginning to construct. I felt I needed to become more active in my research activity and as a next step, decided to track in detail the kinds of interactions that took place by going through all of one student's logs and essays to see what this might reveal. I discuss what I found a little later under the heading 'responsive repertoire'.

But sticking for the moment with the idea of 'fleeting moments', I gained considerable support for the notion in 2009 when I discovered the most recent work of John Shotter in his second and revised edition of *Conversational Realities*. In this he allows the notions of bodily responsiveness and 'now'-ness (Stern, 2004) to influence his work and using the ideas of Wittgenstein, Vygotsky, and Bahktin in particular, is able to construct a very persuasive argument about the nature of influence in what Vygotsky calls 'dialogically structured' situations (Vygotsky in Shotter, 2008). In reading this I realised that I needed to differentiate between 'now' moments that took just a few seconds and that according to Wittgenstein created a 'reaction', the primitive form of a new language game (Wittgenstein in Shotter, 2008), and the longer term changes in outlook and development of ontological and other skills that might follow, and that led to improved capability and changed behaviour. I decided to reserve the term 'fleeting moments' for these passing but potentially powerful interventions/reframes, and use the term 'developmental episode' for the unfolding of learning and development that might then take place (in context) in succeeding weeks and months, to support real changes in practice. Though this understanding came only quite recently in what I'm calling the 'third phase', I will talk about this in the next section as this is where it now fits in my influence schema.

Development episodes

I talk about this ontological concept more fully in Chapter 5 providing examples from student work, but here would like to introduce the idea. When I work with a group involving different disciplines e.g. accountants and programme makers, I often feel that they are just talking *at* each other and no real communication is taking place. There seems to be little appreciation of one's own standpoint or that of the 'other'. For me this means that these different professionals need to become much more aware of their own tacit knowledge e.g. assumptions, beliefs, root metaphors, etc, before they can

understand these 'others' - though I also believe this will have to come from interaction with the others to a large extent; what Shoter calls a 'third kind of knowing' (Shoter, 2008).

In thinking about how I might approach this difficulty I found the ideas of Polanyi (Polanyi, 1983) and his 'we know more than we can tell' conception of tacit knowledge to be very helpful, as I began to see that his alternative epistemology could form something like a 'moral framework' which acts as the 'proximal term' through which life is viewed. Polanyi states that tacit knowledge has two components that are related in a hierarchical way, the *proximal* (subsidiary awareness) and the *distal* (focal awareness). Though both may be known, only one can be told at any one time: generally we attend *from* one, the proximal, *to* the distal, displacing attention and meaning *away* from the body. So we comprehend an entity e.g. an idea or object (focal awareness), by relying on our below conscious awareness of its particulars (subsidiary awareness), for attending to their joint meaning, in what is an emergent process.

Whenever we do this, we are using the subsidiary awareness as a tool to extend our body out into the world, like a blind man using a stick. Though the end of the man's body is his hand, after a while it's the end of the stick that becomes what is focussed on for meaning. Whenever we use something to function as a proximal term of tacit knowledge, we incorporate it into our body, or extend our body to include it - so that we come to dwell in it and it becomes a sentient extension of our body. So as we accrue tacit knowledge it extends our reach out into the world and closer to what Polanyi would call something hidden 'out there'. So our body becomes the ultimate instrument of all our external knowledge, and there can be no purely objective knowledge.

Going further with this line of thought, Polanyi talks about acceptance of moral teachings as an 'interiorisation' - by making them function as the proximal term of a tacit moral knowledge as applied in practice. He says 'to rely on a theory for understanding nature is to interiorise it.....we attend to the world from the theory....attending to things seen in its light, in terms of the spectacle it serves to explain'. Theory can only be learned by practising its application - 'true knowledge lies in our ability to use it'. So a true knowledge of a theory can only be established after it has been interiorised and extensively used to interpret experience. In other words by interiorising and dwelling in these ideas, people can create at a tacit level an alternative way, a theory, for viewing experience - a different lens from which to view reality. This process of interiorisation cannot be one that is predetermined. Again as Polanyi says 'the creation of new values is a tacit process in which people submit to these new values' - so that they become a tacit part of us without us being aware of it. So we submit to them by the very act of creating/adopting them. He says if any theory is to create a true knowledge it must be interiorised and used extensively before it can become something that one relies on tacitly.

In a similar way, I find resonance with these ideas in what Lyotard has to say about works of art and the creative process. In talking about the process of creativity, particularly as this applies to artistic activity (isn't leadership an 'art'?) he says: 'A postmodern artist or writer is in the position of a philosopher: the text he writes, the work he produces are not in principle governed by pre-established rules, and they cannot be judged according to a determining judgement, by applying familiar categories to the text or the work. Those rules and categories are what the work of art itself is looking for. The artist and the writer, then, are working without rules in order to formulate the rules of what will have been done' (Lyotard, 1986, p 81)

I feel that both of these perspectives provide support for my own experience of how I've experienced what Wittgenstein calls a 'reaction' and then through *in-dwelling*, developed over time the new perspectives and abilities – the ontological development - needed to become a legitimate player in this game. I therefore see this idea as filling an epistemological 'gap' in Shotter's latest work on bodily dependent 'conversational realities' (Shotter, 2008), and how the primitive language game or 'reaction' develops into something more significant and durable. So my concept of the 'development episode' fills the gap between a 'fleeting moment' of an arresting insight and the longer term effects on identity as might be seen in a 'reflexive biography' which I comment on later in this section.

The 'systemic' mindset

While I was exploring the nature of influence in the logs/essays on the Exeter MA, I was also working with other external organisations in leadership development programmes, using what I called a 'systemic' approach. This was something I'd been doing full time since 1988 and had adopted and adapted the term from my experiences of family therapy with the Milan School with Cechin and Boscolo (Jones, 1993) and in consultancy work I had been doing with the late David Campbell who while based at the Tavistock Clinic had been one of the most influential supporters of this approach. During 2007-8 David asked me to contribute to a chapter in a new book on 'systemic practice' clarifying my take on the term and offering some examples of my work in practice (Campbell and Huffington, 2009). I introduced the spiral of seven successive perspectives in Appendix 13 in Chapter 1, and it provides a demonstration of the many 'roots' or ways of knowing that influenced this metaphor. As I said in that excerpt, it has helped me 'loosen the grip of common sense ways of looking at things and find novel ways of knowing a particular interaction' which I have in turn been able to offer to others to see problems in a different light. I've referred to this as a 'systemic' mindset or something that enables systemic responsiveness.

When he first saw this in my draft for David Campbell's book, Jack felt that the framework could well offer me a possible frame for my dissertation, a way of showing the different ways in which a situation could be understood. What this interchange did for me was to seed the thought that if indeed this was my take on 'systemic practice', I should be able to discern the influence of this epistemology of sorts in the comments and feedback I offered students in the logs. And if not, I'd have identified a range of contradictions between my espoused and enacted theories of practice (Argyris and Schon, 1996) which would provide evidence for how I might improve my practice. I deal with the consequences of this 'reaction' to the words that acted as '...fresh seed sown on the ground of discussion' (Wittgenstein in Shotter, 2008, p 2) and the 'interiorisation' (Polanyi, 1983) that followed this, in the next part.

As a final comment here, I'd like to say that following my better understanding of inclusionality this past six months, I look upon these different perspectives as different ways of helping *reveal* what might already be active or interesting in a situation. In other words I don't see these 'peering under the surface' interventions as introducing *new* information or making new connections as such. I think I've been helped in making this quite rapid transition from previously connectionist thinking (Varela et al, 1993) by the fact that I've never allowed myself to become in a sense a 'devotee' of any of these approaches. Yes, I've spent enough time to get inside the perspective but then I've allowed it to drift into the background of my thinking to be foregrounded if and when the situation calls them forth. In the past I've always felt a bit of a dilettante and a little

ashamed of this ‘lack of commitment’ as e.g. when working with the late David Campbell and being surprised by the focus and continuing discipline in which he applied the ‘systemic thinking’ approach. Though I could understand and appreciate what he was doing, it was not an automatic reaction for me and I was just as likely to be being stimulated by another or more of these perspectives.

If we accept the postmodernist notion of our lives taking place at the edge of chaos as we try and make sense of ‘how to go on together’ in the hustle and bustle of everyday interactions, it becomes very difficult to make straightforward claims about causing or even influencing something: there are so many factors potentially in play, and many different contexts and time frames with multiple feedforward and feedback loops. But in order to make progress we do need to make an attempt to do this, not only for personal gratification but to create some further knowing about what seems to be happening and how we might influence ‘what works’. And this is what I comment on next.

A responsive repertoire

In looking back over the learning logs of various students and my own responses, I began to get the feeling that there were some patterns emerging between what they were offering me and how I was responding. I wasn’t too surprised by this – after all I knew I was working from some set of principles, probably at a below conscious level, that I’d been developing over the years, so there should be some evidence of this in how I was relating to the various issues that students were raising or I was glimpsing in how they wrote about these and other matters.

So as I mentioned earlier and will discuss in more detail in Chapter 7, I decided to start a more systematic analysis of the textual record contained in the logs and essays to see if I could discern any forms of patterning, and glimpses of influence and relationship development. My detailed analysis of one student’s complete opus for six of the seven phases, and then further spot checking of other students’ logs, did reveal a whole range of regularly occurring responses on my part. Though there were some patterns that occurred throughout the 18 months of directed work, some were clearly more likely to arise in the early months of the programme when most students felt awed by being at university again, and overwhelmed by the volume of work. Others seemed to arise later when students had settled down, were more trusting of their relationship with the university, and could face up to significant development difficulties they had experienced. Of course this timing varied considerably with some students ‘getting there’ much earlier than others.

I’d noticed in the literature on ‘networked learning’ that there had been some analysis of typical roles of online tutors (I’ve referred to this earlier in Chapter 2), and started to do my own inductive analysis of my responses to student offerings. You can see some of the workings in Appendix 6 to this chapter where I rather grandly started to talk about a ‘taxonomy’ of some 12 plus ‘response strategies’ that I seem to have used, to enhance the students’ learning experiences. This taxonomy bears a family resemblance to other such tutoring classifications referred to above, but I felt it identified new strategies/behaviours that appear original in nature in this field. I also felt that the *macro* world view that went hand in hand with this repertoire, together with the dynamic use of these relational *micro* tools, would in time be shown to constitute a novel form of online coaching that I now call ‘presencing developmental possibilities’.

While I found this early model building work on my response repertoire very interesting, I decided not to pursue this line further at the time, as I was by then more

interested in looking at the other features of pedagogy – what I refer to as the *macro* world view above – which I felt needed further investigation. I turn to this next in what I called ‘learning relationship’ and then more recently ‘development container’. As mentioned I will come back to the response repertoire and its relationship with these in Chapter 7.

Learning relationship/’development container’

As indicated above, I seemed to be using a repertoire of ‘interventions’ to stimulate and support student development of a particular kind. And though this ongoing ‘shower of arrows’ seemed to involve a high degree of redundancy (in the sense that the student often did not have the time/was not able, to respond specifically to each of them as such), they did seem to be having a positive effect on the learning relationship/climate they and I worked within, and on their development. So if there aren’t obvious links between the specifics the student offers and coach responds to, what if anything were these multiple interventions achieving?

As I comment on in more detail in Chapter 7, the basic problem is that there is very little direct evidence of the impact and meaning of these everyday and ongoing responses from the coach: the asynchronous nature of most of the interaction, the unceasing movement each week onto yet new ideas and models, and the primary focus of log and essay questions on explicating academic theories, works against this happening as a natural feature of student/coach interaction. To go further, I tried using a hermeneutical cycle of looking at my micro responses and calibrating these with the general metaphors that students offered me when I asked them about the impact of the coaching e.g. ‘you hold up a mirror’. I also found myself being ‘flirted’ with by a wide range of other ideas and metaphors from hearing ‘romantic’ economist Richard Bronk on Radio 4 one morning, talk about Wordsworth’s concept of *negative capability* seen as an openness to the promptings of the creative imagination, to a story about the famous American hypnotherapist Milton Erickson ‘leading’ a lost horse home – I just kept him on the road as he knew where he wanted to go’.

The breakthrough eventually came when I started to imagine what kind of higher level relationship these lower level activities might be creating, and realised that these ‘regular “showerings” of supportive and provocative “arrows”...that between them “align/deepen/broaden/provoke”...awaken...a curiosity about who they (the students) are, why they are here, and what leadership might mean for them – to support self organising and creatively living worthwhile lives.’ (quoted from Chapter 7). The basic ‘macro’ idea of thinking about ‘influencing’ as moderating the kind and depth of learning that takes place in the virtual time-space that the student-coach interactions construct over time, did seem to offer an interesting and useful way forward.

Reflexive biography

In identifying fleeting moments, development episodes, and the responsive repertoire/learning relationship, I felt I’d identified three useful elements of educational influencing in a virtual world. But was there more that I wasn’t noticing? Ronald Barnes’ book on Realising the University (2000), suggested that there was. In the light of the contestability of knowledge frameworks, Barnes felt that universities have a responsibility to assist students on the formation of what Scott (1995) calls their ‘reflexive biographies’. These are regarded as being *made* largely in and through action, through a purposive engagement with the world, as ‘distinct from having one’s

biography made for one by the manifold forces that dominate this supercomplex world' (Barnes, 2000, p 158) . So raising my head from the much shorter term clues occasionally visible in the weekly learning logs and termly essays, I realised that taking a much longer term view of the development process, as suggested here, could add another valuable element to the possible 'mix' of indicators of online influencing.

To use this idea I would need to explore to what extent my students were able to engage purposively and use their powers of reflection and action to more actively construct their development biographies in such a process. To help with the process of identifying the development storyline, I thought I would offer a narrative structure which might provide a container, and use it and the stages in it, to provide a frame for each 'biography'. This would suggest a flow of sorts and also offer criteria for picking on particular statements to include in what would tend to be a 'patchwork' story (Winter, 1989). So one way of looking at these 'biographies' would be to get myself/students to inquire/respond to basic questions which inquire into issues of identity, values, and behaviour and shifts in these over time. A basic list of these appears in Appendix 7.

Keeping these questions in mind would hopefully guide our discussions and my consequent editing of supporting materials in learning logs and essays. I deal with the development of this idea more fully in Chapter 6 which is devoted to such 'reflexive biographies' and offers examples of how this approach has worked out in practice. I also comment in detail in Chapter 7 on a further development of this line of thinking which I call 'indicators of progress' - which I introduce briefly in my review of the third phase of the development of my practice below.

3. Seeking evidence of the effects of my educational influence

While Phase 2 represented a very encouraging development, I had become more and more aware – helped by Jack's promptings for 'evidence' – that I myself wouldn't be happy with the quality of evidence that these findings created in largely asynchronous exchanges offered. What I wanted/needed was a more dialogic form of evidence where the students and I agreed on what had happened between us in the moment, and the logs certainly offered a very indirect and ungainly vehicle for achieving this level of validation.

So building on the learning in the first and second more *action* oriented phases – 'how to improve my practice?' - the third phase has been driven much more by my *research* needs. With this now uppermost in my mind, I've been able to encourage more active involvement of students in what I'm doing, especially John, Jim, and Paul, as well my teachers in singing and Feldenkrais amongst others outside the MA. There is a more active looking for confirmation of working hypotheses from generating a *third kind of knowing* (Shotter, 2008), and the start of an exploration of *criteria of progression* related to the *learning relationship*, both of which I feel might count as *inclusional* standards of judgement. I've also sought critique from other colleagues like Ann O'Brien at Exeter, Marie Huxtable and Jacqui Scholes-Rhodes at Bath, and run a final check of my claims through a survey of students I won't be able to interview, and with a critique group. Finally I've also been able to translate much of my learning and ideas into the re-design of Phase 1 in a way which I hope sets the tone for the entire degree.

So in this phase I began to think more actively about what I could do to transform the valuable record of evidence in the logs to into something more like a 'third kind of knowing', a dialogically constituted form of knowing between persons in context. To do

this I would need to show how this model of ‘ontological going on’, could also usefully be applied within the rather different virtual conversation/dialogues that take place online during the MA. As mentioned earlier, the Ladkin et al paper on the MA programme claimed that in a paradoxical way, ‘distant’ learning could be experienced as ‘close learning’ i.e. close to the context of performance. Similarly, I’m claiming at a much more detailed and personal level, that the asynchronous arms-length online coaching interaction can also – again perhaps paradoxically - have similar positive learning effects as that shown to be happening in face to face interaction. So what has been shown to work for orality in the oral tradition, could also I believe be claimed to work in the literacy-based online textual interactions (Ong, 1982)

Here is a short video clip - *‘using video clips to strengthen validity claims’* - showing how I understood the difficulty I faced here. It is from a supervision discussion with Jack Whitehead in June, 2010 with the clip starting just as I summarise my viewpoint:



7. *‘using video clips to strengthen validity claims’*
<http://www.youtube.com/watch?v=WIEYoSY-oqg>

I begin by saying that what I call the ‘back up’ process for checking the validity of my hypotheses, has to be more ‘real’ – by which I mean through face to face conversation, as in Shotter’s ‘third kind of knowing’. I sketch out my methodology for assessing influence online, talking about four glimpses or ‘evidences’ of influence (note: these later became the three that I’ve described above). I make clear that in addition, I want to get videos of any discussions I have with the students concerned, so we can develop richer and more rounded understandings which we can use to check out the validity of any claims. My body language during this clip I think amply demonstrates my ‘living’ commitment to seeking a more demanding level of validity: ‘so that’s my research methodology...where the other person and I create a joint reality: that’s what that means to us!

Before looking in more detail at the living theory that I’ve been ‘organising and organised by’ in the next section, I’d like to comment on the three main developments that came to the fore in this last more research oriented phase: the search for a more ‘ostensive’ form of evidence of meaning making that I could use to strengthen the validity of my claims; seeking of ‘criteria of progression’ within the textual record that I could use to dynamically assess progress along ontological lines; and the addition of several different ways of involving others in helping me construct meaning and critique claims.

Use of ostensive multi-media evidence

Given this understanding of what the virtual textual record represented, my felt need was to strengthen the validity of my claims through generating face to face conversational accounts that could approximate the ‘third kind of knowing’ that Shotter so eloquently articulates. As I’ve discussed earlier, this kind of knowing is reserved for those participating in the dialogue who are in this sense ‘in the know’ about the subtleties of gestural language and the important legacies and implicit rules that constitute the relevant history of both the general surroundings and the particular exchange itself (Shotter, 2008).

So how to convey this special quality of communication to outsiders in an informative and convincing manner? As Jack Whitehead has explored in recent writings (Whitehead, 2009), what seems to be key in these exchanges is to be able to show how living/life affirming energy and values combine to convey visually and viscerally the striking qualities of passion and commitment that are felt. In this he looks to Vasilyuk’s concept of ‘creative experiencing’ (Vasilyuk, 1991) which describes transforming reality as a process of atonement which can be seen as a ‘sensory-practical, bodily aspect’ - hence the virtue of an audio-visual record.. I was now quite clear in my own mind that the textual representation of these dialogues would not be sufficient. Furthermore, though audio-taping did capture some of the tonal qualities of discourse, so much remained invisible, particularly the tacit elements that often can only be observed through full audio-visual multimedia methods (Eisner, 1988) So I began to think seriously about videotaping my discussions with students and with Jack and others to see what I’d been missing, and to see how I could use this ‘ostensive’ material to enrich my accounts. Though this was something new for me it has become quite a popular approach for research in many areas now. As Heath et al say in their recent publication *Video in Qualitative Research* (2010, p vi) video provides opportunities for ‘fine grained analysis of social organisation, culture, and communication’ as well as enabling ‘new and distinctive ways of presenting insights’ in areas as diverse as operating theatres, control rooms in the Underground and news rooms in the BBC. As they report:

‘Audio-visual recordings are increasingly used to support research that examines the situated activities and interactional organisation through which knowledge, skills, and practices are shared and disseminated...In part driven by the turn towards situated and peripheral learning (Lave and Wenger, 1991) there has been burgeoning interest in using video to also examine the ways in which knowledge is revealed, shared and embodied in...informal settings.’ (ibid, p 8)

My first experience of the power of video-based analysis came when Jack Whitehead video’d our supervision discussion in 2008 and sent me the hour or so on a disk. I was surprised by how much I’d missed in my notes taken at the time, and also, because I’d taken an audiotape at the same time, how much more the visual record revealed. I offer a clip from this video tape later in this chapter of the moment when I spontaneously first used (or ‘presenced’) the term ‘presencing developmental possibilities’ and which, through Jack’s hypnotic repeating of the term and ‘I’ve not heard that expression before’, created a ‘reaction’ in Wittgenstein’s terms which through indwelling has become a significant new language game in my own ontological repertoire.

My own first videotaping venture came when I interviewed one of my past students for a couple of hours, using material from my ‘glimpses of virtual influencing’ (in this case ‘fleeting moments’ and his ‘reflexive biography’) to stimulate our discussion and assess

the validity of my forming hypotheses. When first viewing the tapes afterwards I was rather disappointed in what we'd produced and was rather critical of myself and how I'd managed the session – there didn't seem to be any amazing insights like the one I'd had, and we didn't seem to capture many of the real changes that I/we both felt had occurred. It was only later after sharing some clips of the video with Jack that I realised I was perhaps looking for the wrong things, and often at the wrong person: I had been focusing on the student whereas Jack had focused on me! In doing so he had seen a range of things that I had discounted/taken for granted - like my passion for the work, my close but open and encouraging attention to the views and learning of the student, and my general responsiveness in the moment. I was showing a quality of living energy that Jack associated with the expression of embodied values – and I'd missed all that! It was very good learning and opened a whole new horizon for how I felt I could now approach the task of assessing the validity of my claims.

Criteria of progression

But I'd not yet finished with the textual record in the online system, and was still wondering how I could extract more value from this rich historical material. A chance remark at an Exam Board meeting led to my next sortie into the assessment area. The new examiner at her first meeting expressed some surprise at what she called the 'lack of progression' of student marks as they made their way through the two year programme. They were getting privileged coaching from experienced practitioners, so why weren't their grades improving over the year? Having noticed this pattern and rationalised it for some 5 years, my first reaction was to think she needed to get to know the very varied nature of the programme better before passing judgement. But then as I drove back to Eastbourne began to work with this question myself, but not on the marking issue itself. I was questioning why we didn't have progression criteria that went beyond marks to help us assess the quality and level of *development*. The six criteria on the MA mark sheet focus very much on what I'd call scholarly aspects like writing style and argumentation, and don't really encourage us to look at other forms of development, and what I was calling 'ontological skills', in any sort of appreciative manner.

My conclusions on this initial work I've done on this different angle of approach appears in Chapter 7 when I look at it in the context of my overall pedagogy, and where I say that this is still very much a work in progress. But it is one that I believe will become increasingly important – especially if we take to heart Barnett's view that students should be experiencing not only epistemic but ontological uncertainty and dislocation if they are to develop the qualities needed to perform effectively in a world of 'supercomplexity' (Barnett, 2000).

* * *

Thinking beyond the potential emerging connections between the perspectives in the *systemic mindset*, the relationship between the behaviours in the *responsive repertoire* and the nature of the *learning relationship*, and now the link with possible *inclusional criteria of progression*, it was clear to me and others like Jack Whitehead that I was also being energised by something else. So there was still more digging to do. And it is

to these still tacit sources of energy and direction that I will turn to in the next section titled 'steps towards a living theory'.

APPENDIX 3

Towards an MA in Leadership Studies for ‘Practitioner-Researchers’ Ideas for introducing ‘research’ as a thread *throughout* the MA

We both have ambitions to create a higher degree pedagogy and programme that aspires to the ideal of ‘close learning’ and is therefore particularly suited to supporting inquiry and learning from practice. A necessary part of such an approach is to view students as ‘practitioner researchers’: experienced people who become better at what they do, in this case leadership, through studying their own and others’ practices, as much as by learning from the ideas of the Academy. This is particularly apposite if we lean at all towards ideas of ‘leadership as process’ (Wood in MA in Leadership Studies, Phase 6) where it’s only those intimately involved in a particular situation that are able to notice and make meaning of those ‘fleeting moments’ that could constitute leadership in that time and space.

In this frame we might think of ‘theory’ as a more of a *provocation* to learning from practice than as the preferred way to do things. This is not to downplay the importance of academic theory and writings but to look for a better dialectic and balance between these two symbiotic processes. As Richard Winter points out:

‘...theory, being based in practice, is itself fundamentally transformed by the transformations of practice. Theory and practice do not, therefore, confront one another: each is necessary for the continued vitality and development of both....theory and practice *need* each other and thus comprise mutually indispensable phases of a unified change process...’ (Winter, Learning from Experience, 1989, p 67)

Providing a large amount of detailed information on research philosophy and methods right at the end of the programme in Phase 7 doesn’t seem to be an effective way of nurturing these thinking and doing skills which take some time to develop. As things stand, students have to learn to use the methods *as* they do the dissertation, which doesn’t seem sensible if we are looking for quality work. It would be better if they were practicing these skills in some way throughout the 18 months before the in depth research. It also in a sense ‘wastes’ many potential micro research opportunities and ideas occurring during the first six phases of the programme – or at least these ideas lie fallow for a long time before the dissertation.

As a move towards supporting this intention to develop practitioner researchers, we have decided to look at introducing ‘research’ i.e. philosophy, methods, skills, and practice, right at the outset of the programme and as one of several key themes that run throughout the seven phases of the degree (see later for ideas as to what these other themes might be). Making this shift obviously involves some change of content in all/most of the phases. But we also need to consider what changes might need to be made to two other major influences on student learning: interactions with the online coach; and the issues raised and kind of inquiry we encourage on the Discussion Forum. What follows focuses on the content issues but we should also look at the kind of changes we might want to see happening in the other two as well.

To develop this more distributed approach to helping students develop research skills, we first need to take account of the current offering in Phase 7 and to what extent we can usefully trail the various idea/approaches offered, at an earlier stage – particularly for Phase 1 given your deadline of 5 September. We also need to assess what understanding and methodology we now believe MA students really need to do a competent dissertation, and whether what is on offer is sufficient and of an appropriate level. Some discussion amongst the dissertation supervisors is needed to answer this second question – for example, how well are they doing the dissertations, what range of tools are they finding useful/practical, and just how much research methodology do they need to write critically and reflexively about what they've researched? This will perhaps be best answered during or immediately after the marking of the current round of dissertations which would fit in with your current deadline for this phase of 4 January.

I offer below a first attempt to see how this intention might play out across the phases, and what changes/new work might be needed. My thought is that we should introduce ideas in the earliest phase appropriate but then keep coming back to the core ideas and processes as we progress through the phases. For example, it does seem apt to introduce the idea of reflexivity in Phase 1 where the focus is on the individual and the personal nature of meaning making on their journey. But then we should continue to come back to this central idea during consequent phases where this feels timely. This will allow time for students to really understand the ideas and get some practice in using the techniques, thus developing a certain level of skill before the dissertation proper starts.

What follows are suggestions for the research focus for each of the phases with more details on the First Phase where the deadline is fast approaching us. As a first cut may I suggest you think about adjustments to the opening page of each week where you could reframe the purpose of the week slightly differently, and about a new briefing for the coaching group as to what and how they might accentuate this shift in thinking

Phase 1

Research focus: the focus is on 'personal knowing', and so we should begin to introduce the notion of knowledge/knowhow being something that an 'I' notices and does, rather than a god's eye view, emphasise the need to bed the development programme down in own experience and developing a greater awareness of self, provide experience of the double level structure of reflexivity e.g. doing it and then reflecting on what that doing says about the doer, and begin to develop the practice disciplines of reflective writing.

A quick skim through the current seven weekly modules raise the following points:

Week 1: 'Adventure of HE'. Could we say more about why it's a personal and group 'adventure' making more use of the metaphor, exploring the different personal meanings that people might bring to this adventure? For instance – it's not principally about learning from academic texts in a university but an opportunity to learn to think and act differently in the real world. (By the way, I can't find any instructions on Activity 2, Steps 5 and 6?)

Week 2: 'Learning Log'. This looks fine – there's plenty to read and practice. Rather than just calling this module by its functional name, perhaps we should rename it to give a sign of what it's about i.e. 'learning by reflecting on experience through writing', 'writing as learning', and so on e.g. some 'first person' research

Week 3: 'Identity and Leadership'. Depending on what PG offers here, we might include a reading like Jack Whitehead's 'How do I improve my Practice' to bring out the idea of 'practice' and the 'I'. This would also be a good time to start differentiating more clearly the two different types of logs – 'directed' (mostly about 'programme materials') and 'personal' (mostly about 'my development journey') and get them to do one of each on the work of the week

Week 4: 'Study Skills'. There seems to be plenty for them to get stuck into here. In fact too much – I doubt whether many students are able to take all this stuff forward without further help! I think it's fine to *introduce* all this stuff but we should make a point of coming back to most of these things regularly throughout the programme, so that there's a possibility of these ideas and practices becoming ingrained. So we might define 4-6 particular things like e.g. 'identifying claims and supporting evidence' and 'constructing an argument' and make a plan to pick each of these up a few times during the next 4 phases, plugging in an exercise/learning log to reprise and give them practice on each of these.

Note: having written this, I think this ought to be one of the key 'themes' running through the programme that we keep coming back to, to check progress, take corrective action etc. It's not a one off thing but one of those mainly invisible 'meta-skills' they need to work on throughout the programme. Reviewing their termly essays isn't enough or necessarily the right place to handle all of this. We can also offer them other models: for example, regarding writing, I've always found the McKinsey approach to writing reports to be very helpful both as a method of analysis and structuring essays – maybe we could offer this during one of the phases as one way of analysing a text/structuring a paper? There is a good book available too – Barbara Minto's Pyramid Principle. There's also plenty of other stuff like 'writing the bones' and 'embodied writing' we could introduce later on.

Week 5: 'Learning Styles'. Given the influence of learning styles on the 'I' doing the whatever, this is a good opportunity to reflect on how LS's can and do influence what you notice and how you respond/develop what you notice, and how taking up different stances can change this. Might be a good time to introduce introductory ideas about Judi Marshall's idea of 'living life as inquiry' (or living life as leadership). I'm reading an interesting book called A Discipline of Noticing by John Mason who shares many ideas with her – he calls it 'researching from the inside' - but has a much more developed set of methods/exercises to demonstrate what's involved: a book's worth rather than a paper's worth. It's also very much focussed on the idea of practitioner research. So might be worth introducing the basic idea of these 'self practices' in this phase and then 'dribble' the different ideas and practices in over several phases.

(by the way, has the Discussion Forum 'project management' exercise been changed as students have no chance of comparing their readings with each other in the time frame they originally had. If you keep it as it is, it may be better to make it an asynchronous activity over several weeks)

Week 6: 'MBTI'. This week provides a further opportunity to add to information already garnered on the 'I' (as well as on the I in interaction with others, though this is less prominent) I'm sure one of Jenny Rogers' MBTI booklets lists typical stances for say 'problem solving' cum 'inquiry' for the different types, which could be useful here too.

Week 7: 'Values'. Need to look at what you're transferring from Phase 2 first – but clearly another opportunity for thinking about the make-up of the 'I' and what kinds of factors influence primary perceptions and behaviours. However we might already have more than enough on the 'research' idea in Phase 1!

Assignment: rather than focus so much on the diagnostic instruments, use this essay as a good opportunity for the student to try and integrate all the insights into the 'I' that they've been able to make over the seven weeks, and to identify the sorts of developments in 'self practices' that they want to focus on in coming months – a first go at taking up the 'first person research' mode of studying. I realise I haven't mentioned this idea as yet....maybe it could be introduced in the Learning Log week, or in Phase 2?

Phase 2:

Research focus: the focus is on 'propositional knowing' and so emphasise the need for a critical engagement with the literature, examining claims and evidence, a beginning on the 'politics' of texts looking at assumptions/presupposition/values, and indicate what constitutes a lit review.

Perhaps introduce the Guba and Lincoln's paper on ontology/epistemology/methodology as something to critically examine (Competing Paradigms in Qualitative Research, 1994), or Peter Reason's briefer coverage in Co-operative Inquiry as a Discipline of Professional Practice. These would be a tough papers for them to critique but it would introduce the fundamental 'ology' triumvirate and the notion of social construction/constructivism early on, allowing us to talk about these things incrementally during consequent phases - rather than come to them all of a sudden in Phase 7, as though these ideas had no connection or relevance to what's gone before.

Phase 3:

Research focus: the focus shifts to 'experiential knowing', and so a time to introduce CARPP's 'extended epistemology' as a lead in to the basics of ethnographic methods involving being both close and distant, and through a stronger de-brief on the Exchange – 'so you saw x....what does that tell you about yourself?' - another opportunity to explore self reflexivity. Perhaps offer Judi Marshall's papers on 'living life as inquiry' and 'systemic thinking', as well as further material from John Mason's Discipline of Noticing. This is also a time to introduce ideas about 'second person' research and approaches like Torbert's 'action inquiry'. Maybe the essay topic should be a bit more prescribed (at the moment they have quite a lot of choice on what they focus on) in the sense of asking them to offer as now, observations and interpretations in a 'first part', and then ask them in a 'second part' to discern important aspects of themselves in what they have perceived and written about? This might be a good place to introduce the practices of 'embodied writing' – something I was introduced to at CARPP at a seminar offered by Rosemary Anderson.

Phase 4:

Research focus: the focus could now shift to 'knowing as stories', introducing narrative methods (including the use of fictional writing, showing how they can collect and analyse stories looking for themes, and treat what they observe and interpret as more 'storying' about stories. and how their reports/papers could be treated as 'cases' providing text for further analysis and meaning making. If you do introduce the

complexity and continuity stuff, there's more scope for different kinds of stories and Jonathan's soap opera approach to understanding change

Phase 5:

Research focus: given the interactional character of this phase, the focus could now shift to 'knowing with others' or 'social learning' e.g. Shotter's 'knowing of the third kind', where we could deal more thoroughly with social construction/interpretive approaches introducing learning conversations, dialogic methods, and further developing 'second person' research approach. As this is very much an interventionist phase we could also provide materials on 'appreciative inquiry' as a conversational inquiry method, and possibly also large group interventions which start to enter the domain of 'third person' research. possibly metaphor and CL, (video on coaching)

Phase 6:

Research focus: this is a phase in which to take a breath, review perspectives, and consolidate their learning before going on to the in depth research. So the focus could be on 'multiple ways of knowing' giving students the opportunity of placing their own knowing in the context of others' knowing. This would start to meet Ronald Barnett's requirement identified in *Realising the University* (2000) to introduce 'ontological ambiguity' into the educational relationship in order to prepare students for living and performing in a world of 'supercomplexity'. The 'leadership as process' week certainly does that and offering other 'leaderships' like Chinese and so on would add to the rich picture of perspectives. So this would be a more sophisticated opportunity to identify the power-based and cultural 'footings' of various schools of thought (especially the Western tradition!) and allow the student to address the rootedness and issues around their own chosen perspective

Phase 7:

Research focus: perhaps best to wait until we've had our supervisors discussion before trying to answer the main question for this phase i.e. what are the research capabilities they need – beyond what we've already introduced them to in the first 6 phases? They will have got quite a lot on 'first person' methods and self-reflexivity and an introduction to ethnography. This would make the 'action research' module much more accessible (possible reference: Coghlan and Brannick, *Doing Action Research in your own Organisation*, 2001) and allow us to do more on 'qualitative analysis', like how to look for themes/subthemes etc as you build up a view of some sort grounded in your experience and data (possible reference: Coffey and Atkinson, *Making Sense of Qualitative Data*, 1996). We could do more to build on what they've done on 'writing as learning', using *The Discipline of Noticing* as a method of inquiry, and how to use 'lit search' to find a suitable research question.

Perhaps that's enough for now! Talk later

Keith

28 August, 06

APPENDIX 4

MA in Leadership Studies Offering Formative Feedback on Essays Some Pointers for Coaches

These are some reflections arising from my experience over several years of trying to provide 'formative' feedback on student essays - to encourage them to focus on their own learning and practice, as well as achieve better grades. By 'formative' I mean feedback aimed primarily at helping the student *learn* as against 'summative' feedback which is about how well a student has done against a formal standard (see Black et al, 2003, Assessment for Learning, OU Press)

These reflections are written as points to be aware of and, if relevant, to comment on in order to raise students' awareness of and confidence levels in their own experience and tacit knowledge, in the face of the dominant academic 'body of knowledge' they may feel they are required to master. Though there is not a one-to-one correspondence between my eight categories and the six offered in the Assessment Form, there is enough of a family resemblance to perhaps encourage us to do further work on 'operationalising' the use of this form.

1. Assignment question(s): often students don't answer the question set and so a first point to assess and comment on is, to what extent they have grasped and responded fully to the actual question(s) posed on e.g. theory, application, practice; or, particularly later on in the programme, clearly defined and justified their own substitute question(s) they have chosen. A particular challenge here is assessing the extent to which they've been able to *pull together the various strands* they've developed in the course of the paper, into a coherent response to the questions or questions, as against offering an interesting 'list' or set of ideas and propositions.

2. Structuring: because of time pressure many students don't spend enough thinking through the structure of the argument they are going to use to respond to the question asked, *before* they start writing. They could strengthen and shape their arguments better with more attention to matters of 'structure'. This obviously includes providing an *introduction* to their essay – setting the context, saying why they have chosen this topic, and indicating how they plan to address the question. And further, equally obviously, providing a 'full' *conclusion* covering amongst other things, what the student has learned, and what *practical* action they are planning to take to better contribute to leadership in one form or another in their working role(s). Many also fail to make good use of the smaller 'tools' of structuring like using *headings, subheadings, bullet points* and so on, to better articulate and 'signpost' the points they are offering in support of this. A good basic reference to offer them here is the book by Barbara Minto on the 'pyramid principle', a structuring approach used by the McKinsey organisation particularly during the 70's and 80's, to help their consultants deliver better argued reports (Minto, The Pyramid Principle. 1987).

3. Argumentation: whether or not they've created an effective overall structure for their argument or not, the critical issue is how well they lay out the detailed arguments for the many claims they will be making to support their overall thesis. Are you aware as you read through the text that you're asking many questions of the text – 'what do

you mean here?/who says this?/where is the evidence for this claim?'. When they draw a conclusion or make a claim of 'what is/ought to be', they need to marshal relevant bits of evidence and examples to support this, both academic and experiential, so the reader can both understand what they mean, and form a view as to the validity of what they're saying. They and you might feel – 'well, isn't it obvious what I mean' - but the tendency to make broad 'intuitive' or 'common sense' claims without offering argument and evidence is an insidious one. It should be picked up and worked on from an early stage, well before dissertation time, so students can develop their own rules of thumb regarding what they need to define/support and what they can take for granted. A good discipline here is to encourage students to identify the impact of an idea on their *own* thinking, how they believe it has helped them as leaders understand/influence the attitudes/behaviours of *others*, and to provide *evidence* for any such *claims* they might make about the impact of this knowledge/framework/technique.

4. Use of resources: I like to think of the academic 'body of knowledge' not as *the* learning but as providing a *provocation* to student learning and practice improvement. And in a similar way, that students' experience/knowledge of their practices can provide the stimulus to challenge academic theory and models. In this way it's possible to think of a 'circulation of learning' taking place that includes both theoretical and practical knowledge. So it's important for students to make use of *both* of these sources in their written work and to show this use through quotes/references - from the *leadership canon*, their own writings in their *learning logs*, as well as drawing upon a wide range of *non-specialist sources* in e.g. everyday newspapers/TV, fiction, and the arts. Over time I also look for students to be using *challenges in their workplace* to stimulate them to 'pull in' relevant theory/models, rather than theory/models offered in the programme being the start point for their learning. This is very much the approach advocated by Richard Winter in his texts on action research – see e.g. Winter R, 1989, *Learning from Experience*, Falmer Press.

5. Critical engagement: these essays provide an opportunity for students to demonstrate how well they are engaging with the theoretical/academic frameworks offered in each phase. This requires them to 'get in close' to show that they understand what's on offer from the 'inside', so to speak, and also to step back and identify the edges of legitimacy, gaps, confusions, claims without evidence, and political interests being served in these texts. In other words, they need to become critical as well as appreciative. This critique should also refer to the challenges of applying the ideas in practice and in different contexts – so how well are they doing this with respect to personal critique of their own experience of everyday practice, as well as theoretical criticism in the literature?

6. Critical subjectivity: at a different level we have the 'reflexivity' question – to what extent are students aware of their own body-mind cognitive apparatus that influences what they see and think?; and to what extent are they adopting a *critical subjectivity* towards the experiences they describe? This involves a self-reflexive attention to the ground on which they are standing, and here they need to demonstrate some detachment and critique of the ideas they are attracted to, the claims they make, and reflect on limitations of application. As *improving leadership practice* is seen by some of us as a central tenet of the programme – despite its 'Studies' title - what is also often missing from student writing are the '*personal*' and '*practice*' sides of things: there needs to be more about their *own* leadership experiences and practice, and how they might go about getting more out of the former and improving the latter. This is where writings in learning logs (and Discussion Forum) can be helpful: through quoting from these in a

freer manner over time, a student can begin to see how their thinking is changing, and what ‘frames’ and assumptions may be being altered.

7. Originality: this is a difficult quality to assess. In identifying, assessing and encouraging any tiny ‘sparks’ of creativity and originality, I find myself looking for evidence of a range of things, and being prompted to offer further ideas/texts to add fuel to the fire/encourage further work.

- *insights gained into own experience/personal patterns* which help the student e.g. place greater value on their own tacit knowledge, identify the edges of their own learning journey, and formulate what they need to work on to improve their own practice.
- *identification of interesting and/or puzzling ideas/notions* in essays that might form the basis (or become a part) of their dissertation,
- *making high level connections or integrations* across several different areas of theory, or between theory and practice, which indicate an ability to think and write at a meta level
- *finding novel ways of applying theory/models to improve practice* e.g. creating opportunities at work where they can try out and get feedback with ideas and approaches
- *grappling convincingly with challenges to conventional thinking:* we might now refer to managers as living in a ‘post-modern condition’ where levels of uncertainty, diversity of views, and a readiness to contest previously accepted norms, are much higher. In this they need to be able to recognise and work with multiple perspectives and a contested view of truth/reality, to be sensitive to the effects on ‘voice’ of the usual asymmetry of power relations, and to be alive to the many micro opportunities at ‘edge of chaos’ conditions, for creating conditions for rapid change. So to what extent are students aware and taking some account of some of the questions nibbling away at the boundary conditions supporting the leadership canon – for instance:
 - the influence of *context/contexting* on meaning making?
 - implications of *complexity theory* for change and continuity?
 - the impact of *social constructionist* thinking on notions of ‘truth/reality’?
 - *power relations* and the influencing process?
 - *process theory* and more improvisatory approaches to change?
 - *relational and systemic thinking* and their impact on identity construction?
 - *authenticity* and dealing with the contradictions involved in trying to ‘live the theory’ when there are gaps between ‘espoused’ and ‘enacted’ values and tensions between local ‘experiential’ and universal ‘propositional’ knowing?.

8. Writing style: some students have a tendency to write very long and complex *sentences* and embed these in very long *paragraphs*, often stretching for a page. They may also not offer brief *summaries* of points they’ve made in a section, or offer *links* to previous or following sections. Spending more time on these aspects will improve the flow and continuity of their writing and make it easier for the reader to understand the points they are trying to make. In making use of references e.g. (Argyris, 1984), it’s often powerful to use a *direct quote* from that text (remembering to provide the page number!), in order to show the reader what in particular the student has found interesting/pertinent/relevant to the issue being discussed, and how they are understanding that author. This also introduces variety and enlivens the prose as does the use of *metaphors* and other evocative means of getting meaning across. This writing

practice also starts to give pointers to how students' work may be positioned within a particular 'tradition' of thinking/writing; not critical for individual essays but something that becomes more important in the dissertation.

* * *

In practice I believe I use this set of factors *not* as a 'scorecard' which I have in front of me as I read the essays, but as a background frame of reference, picking these out of the 'quiver' if and when I'm stimulated by something in the text itself. As I read through the text, I also make a practice of making my inner conversation about these factors visible to the student, by using the 'track changes' tool in WORD. I got this idea while getting feedback from Judi Marshall on one of my papers at Bath, finding it valuable in appreciating how others might respond to my writing. So far no one has objected to this practice at Exeter!

Keith Kinsella

18 July, 08

APPENDIX 5

CLS Teaching Day – 23 February, 09

Formative Assessment and the MA in Leadership Studies Should We Take This Approach Seriously?

As I submitted this item but won't be able to attend the discussion, I'm offering these introductory remarks to see if there might be interest in making this something that we might do some work on together in a more systematic way. I suggested this topic to Scott partly because it's something I'm personally interested in, believing it could be very relevant to the future development of the MA programme, and because I suspect it might also have something to contribute to aspects of the business school's new strategy.

The purpose of this note is therefore to identify formative assessment practices as an item for our strategic agenda, and through briefly describing the essence of the process, sketching out some of the methods and tools which teachers and facilitators of learning can use to support the process, and providing a few examples of this in my own practice, to give you something to guide your review of this approach.

What is this thing called formative assessment?

A review of evidence carried out by Black and Wiliam (1998) of a range of studies from the past two decades, suggests that there is a strong connection between student performance and the use of *formative* assessment methods, especially when used as an integral part of education programmes. In contrast to *summative* methods where the focus of assessment is on *certification*, formative methods provide assessment for *learning*. Using the term 'formative' implies that both students and teachers are able to use such feedback to improve their learning, *and that this feedback is then used to adapt the 'teaching' approach* to meet the learning needs of students. (For a brief definition see <http://www.ukcle.ac.uk/resources/assessment/formative.html>)

Most of the studies reviewed by the base study by and the subsequent more systematic and participative studies carried out since by Black et al (2003), have focused on school age children and primarily with subjects like science, mathematics, and to some extent English. So we cannot think about a simple transfer of the learning obtained from this work to the mature students we are working with in higher education, in a much more contested field like leadership – and further, in the case of the MA, in a 'distance learning' programme.

However with the MA being a 'coached' programme, there is I believe a natural tendency towards formative methods anyway. And my own experience on the MA over the past 5 years suggests that the concept and many of the findings could help us improve our own educational practices, with much to gain from considering, applying, and refining ideas from this body of work. I'm also convinced that such gains will over time considerably enhance the current 'product' our students are offered, and the learning outcomes they achieve, thus further enhancing a potential 'flagship' brand for the business school.

What kind of change might this represent?

In addition to grappling with the challenges involved in transferring ideas between two rather different educational contexts – school and HE - we also need to confront the very real problems that the school sector itself is still struggling to address – effective implementation. Though the benefits of adopting formative methods are probably no longer in dispute, this is not an approach that can just be ‘tacked onto’ existing systems and cultures. Instead we are talking about a ‘second order’ level of change in that not only will teachers/facilitators of learning have to alter the way they look at their educational project and pedagogic philosophy; they will also have to adapt the roles they take up, develop the practical skills that are required to work in this way, and embed these naturally in their teaching/facilitation practices. And for this to be more than an isolated and short term change, these changed methods will also need to find support within the broader strategic, commercial, and educational disciplines being followed by the institution – in our case the new business school.

So adopting formative methods does not represent ‘fine tuning’ but quite a significant development if we are to genuinely embrace the approach – for us as individuals, for the group who provide support for the MA, and for those parts of the wider business school community that we depend on for our continuing existence. The strong coaching culture within the MA support group represents a positive ‘force for’ change but this is unlikely to be the case in the more ‘traditional’ parts of the system we are working in.

What is the essence of formative feedback?

National and local requirements for certification and accountability e.g. GCSE’s, essential as they may be, exert a powerful and often harmful influence on assessment practice. So, as Perrenoud points out in his review of the formative approach, any teacher who wishes to adopt formative methods, has to ‘...reconstruct the teaching contracts so as to counteract the habits acquired by his (sic) pupils.’(Perrenoud, 1991). To use formative methods, teachers need not only to change their own methods – they also have to change students attitudes and beliefs towards learning and assessment.

Sadler (1989) identifies two key actions at the core of such assessments: the first involves the student *forming a clear picture of the gap* between what is desired and his/her present state of knowledge/ability/performance; having understood the evidence about this gap, the second requires the student to *take action to close that gap*. What could be simpler you might say – but the key point being made here is the need *for the student* to get involved in various kinds of *self-assessment*, if appropriate action is likely to follow. With these two activities in place, Sadler’s third component in the process is *feedback* which needs to address the following four issues:

- information on the *actual level* of a measurable attribute/performance
- information on the *desired level* of a measurable attribute/performance
- a means for comparing the two and *assessing the nature of the gap*
- a means by which this information can be used to *take action to close the gap*

Using slightly different terminology, these ‘...four steps could be a description of formative assessment.’ (Black et al, p 15). If the information is not actually used, directly or indirectly, to close the gap, it is not seen as feedback and can’t be considered to be formative. If students ‘...are only told that they’ve done well or badly, it will affect their ego but it is not likely to improve their involvement with their tasks...’ *(*ibid*, p 15).

What is clear from this basic model is that it is the *quality of feedback* on each of these four elements that is the key feature that gives life to any formative assessment approach. In the case of the MA this model raises some particular challenges in terms of how we – the student, coach, and Centre – find ways of defining the desired and actual levels in practical ways that enable us to jointly clarify the development gaps and devise/facilitate appropriate improvement action.

Key formative tools and approaches

Apart from the changed attitude towards assessment that is required, there are many potential ways of framing formative feedback methods - including using summative feedback as formative! Of course I'm talking at an intentional level here: how the feedback is actually experienced depends primarily on the students themselves and not on our intentions!

However at this level of intention and strategy, the Black and Wiliam work (1998) identified four main methods: questioning; feedback; sharing criteria; and self-assessment. Some of these have been taken forward and further developed by Black et al (2003) and they report as follows:

- **questioning:** in their work with teachers in schools, they discovered that lengthening the 'wait' time between asking a question and offering answers increased student involvement and learning, as did asking more open questions and altering the culture of only responding to questions if you knew the answer, to a 'no hands up' culture where everybody was expected to be able to respond whether or not you knew 'the' answer. Teachers found this practice encouraged more *thinking* in the class (as against rote learning) and helped them frame and develop far more effective questioning techniques.
The WEBCT material certainly makes use of general questions to stimulate students' thinking about the articles they've read; and from casual inspection of a range of logs coaches also ask questions about the students' log writings to try and deepen and personalise the learning. To improve the impact of this natural coaching approach, it may be worth exploring the nature and type of questioning being used.
- **feedback though marking:** the study regarded 'questioning' as giving *oral* feedback so this intervention was focused on giving *written* feedback. One of the studies revealed that a 'comments only' practice led to significant learning gains whereas 'marks only' and 'marks and comments' practices led to no improvement at all! This surprising finding created considerable 'cognitive conflict', and as many also felt unable to even consider a 'comments only' practice under their school's marking policy, this proved to be a very difficult finding to pursue.
In the MA we provide both an overall mark, supporting gradings (A-E) against six university set sub criteria, and up to two sets of written comments – one group distributed in the essay body, and the other as a summary on the assessment sheet. I don't think anyone has tried to assess the impact of any of this - but given the findings in the schools work, it is likely that many students probably just look at the overall mark given.
- **peer and self assessment:** this was one of the key findings in the Sadler work mentioned earlier – that self assessment was a key stimulus for encouraging students to take *ownership* of their own learning. Peer assessment was also found to be helpful in this regard. But to enable this, students needed help to be really clear about what success looked like, to develop good habits in monitoring

their work, and to be learn to listen and collaborate in peer assessment exercises. The studies found that such assessments made a contribution to learning that no other methods can achieve.

In the early stages of the MA programme there are some self assessment exercises focusing on learning styles etc; and the end of phase assignments in the MA ask students to review their general progress often against some models of leadership. The Discussion Forum also provides opportunities to give peer feedback although this tends to be mainly at a cognitive level. It's not clear just how widespread or how effective these practices are at the moment, and the extent to which we could extend and deepen this process.

- **formative use of summative tests:** although certain academics had - because of the 'punitive' effects of the summative approach - proposed a strict separation between these two types of assessment, the teachers taking part in this work felt they had to operate in a way where these two approaches worked side by side. They found that it was possible to use the formative approach alongside the more traditional summative methods in e.g. supporting students in more effective review and revision work, encouraging students to set their own questions and mark answers as a way of deepening learning, and using the formative approach to help students review and learn from their results on more formal and summative tests.

I suppose at the moment the picture within the MA is a confused one, in the sense that this discrimination between formative and summative has not been discussed in the coaching group, or reviewed with students - so assessment and feedback is being treated as a mixed process within a 'comments and marks' approach, and with different kinds of feedback accompanying the marks. I comment briefly on my own practice below

Because these ideas and findings arose in the context of face-to-face interaction within regular classroom sessions, we need further reflection to situate these in our rather different situation and assess their relevance and usefulness in our own practices:

Brief reflections on my own coaching practice

As part of my PhD studies, I've been going through learning logs/responses from previous years to identify patterns in my work and amongst other things, assessing to what extent I've been 'doing' formative assessment – perhaps without knowing it! It's clear from early analysis that I have used a wide range of responses many of which could be construed as formative in intention. However given the generally asynchronous, 'distant', and non face-to-face nature of much of this interaction, it's not possible to make firm claims about the effect of these moves without further investigations. And this is what I'm busy with at the moment, involving some past students in the process – so watch this space!

However I think I am in a position to outline some potential claims about my practice and its connection with this question about 'formativity', which I suspect are likely to apply to a greater or lesser in the work of other coaches too. In particular I think I can say that:

1. I believe most of my feedback on the learning logs is formative - both in intent and hopefully in effect too. I don't find this surprising as, in addition to helping students achieve a higher qualification, I see the MA as an opportunity for development not only in leadership terms but in learning to live a worthwhile life. So in addition to what the WEBCT learning materials and tasks themselves

- stimulate, I can recognise a range of actions within my log responses that fall into or alongside the four methods identified above.
2. With regard to the essays at the end of each phase, my focus seems to be split between formative and summative feedback. Because the essays count so strongly towards achieving the qualification I focus my feedback on the assessment forms primarily on showing students why I have given them a certain mark and what they could do to improve their grades. In this sense this feedback can also be seen as formative in terms of helping students improve their marks, but it is limited to the areas that the university is interested in and so is primarily academic in intent. I think though that I may at times be guilty of trying to use the marks to encourage or provoke different behaviours – but fortunately the influence of second marking by the Director of Studies moderates the effects of this! (I attach to the e mail a copy of a note I wrote last year summarising my approach to essay marking as further evidence - of my intentions at least)
 3. While this formal feedback on the assessment form may serve both purposes, I've grown used to offering more informal and fragmentary feedback in the body of the essay texts themselves. These take the form of questions, supportive comments, grumbles, offering further resources, challenges, suggesting experimentation and action, etc, and seem to focus more on what I see as their broader developmental agenda as leaders. However, this process seems quite uneven with some logs unleashing a wide array of 'interventions' from me while others do little more than say 'Good - I've read this – keep at it!' So one line of inquiry would be to see whether the content of the phases/weeks, or critical incidents therein, in any sense 'hold' different potentials for this formative assessment activity, or whether it's more to do with my own circumstances.

I hope that this short paper has done enough to stimulate some discussion during your meeting, and that some of you might be interested in devoting more time to exploring how we might make use of this approach and what we need to do to shape, position, resource, and make it part of our pedagogical approach as we develop the 'family' of programmes under the MA in Leadership Studies banner.

Keith Kinsella

18 February, 09.

The links below offer some useful commentary on the formative approach

<http://www.ukcle.ac.uk/resources/assessment/formative.html>

<http://www.literacytrust.org.uk/Database/assessment.html>

<http://www.assessment-reform->

[group.org/images/ASF%20Report%204%20Appendix%20E.pdf](http://www.assessment-reform-group.org/images/ASF%20Report%204%20Appendix%20E.pdf)

http://www.qca.org.uk/qca_4337.aspx

APPENDIX 6

REPERTOIRE OF THE 'PRESENCING COACH'

(examples of each behaviour that appears in the learning logs are in blue text)

I INFLUENCE EXPECTATIONS

Behaviour 1: take steps to 'level' power relations in a knowing field

Decentre position of coach/MA/university, positively connote tacit knowledge of student, frame the learning interaction as something that will take place *between* us and student group, and where learning will be *mutual*

'I've got lots to learn about leadership, change, and development from someone with wealth of experience and seniority you have...we're all on same level when it comes to understanding the mysteries of organisational life...'

Behaviour 2: empathise and affirm other's views/feelings

Offer support (not agreement) for specific judgements/actions as they arise, especially when student is 'resisting' conformity to authority. Encourage being different and finding individual voice

*'You've obviously had considerable experience of leadership...already made a start on reflecting on this unique and valuable body of tacit knowledge...the MA will support you in this, helping you make more of your 'active wisdom'

* 'I found this a very powerful log where you are being almost brutal in your honesty about your normal patterns and 'strengths' of working and how these are playing out in the more dynamic, politically charged situation you are now working in. Full marks for a sound and insightful appreciation of the 'what is' situation - the first step in thinking creatively about how to 'go on'

Behaviour 3: cast doubt/question conventional understandings

Question easy acceptance of orthodox ideas and conventional wisdom. Suggest potential limitations or weaknesses

'I personally doubt the strength of the inferences you and others seem to have drawn about your 'weak verbal reasoning'...having had some exposure to your verbal reasoning qualities in conversation...this only serves to strengthen my own personal bias about...accuracy of these psychological instruments...great for provoking debate and stimulating different lines of inquiry but I take the actual results with a large dose of salt! After all they are just simplified models of one or more aspects of a social construction called the 'personality', which have been developed under 'social science' conditions. And we know from our own experience just how rich, varied, and mysterious human behaviour can be, especially when you add in what's often missed out, the impact of social context

II CHALLENGE PERCEPTIONS

Behaviour 4: caution premature closure – 'slow down/stay open'

Encourage student to stay open, let time to pass, avoid a rush to judgement, & allow new understandings to emerge

*'You may indeed be 'extreme' in your patterns but let's wait and see on this. I bet that with careful observation you may well find you already have a wide range of alternate

behaviours in your portfolio, perhaps not at your command but certainly close to your fingertips. If you can disengage a little from your 'dominant story' of who you are and how you behave, you might be surprised to discover lots...other patterns which at...moment don't get much recognition'

*'The constitutive approach takes us into hotly contested academic territory where the battle over what is truth rages...Once you enter the relativist landscape...truth becomes something that is frail and transitory, and negotiable within a community of practice...Over time this community has grown used to making common assessments which seem to have worked well;...ceased to be temporary agreements but have taken on the appearance of a solid reality: what's called a reification... it's a bit more than just a case of PR/media/spin etc...many bright scholars are arguing about this so there's no need to draw quick conclusions on the potential benefits or otherwise of the constitutive approach. I would recommend that you keep open to this notion for a while longer and see what happens over time in terms of 'does it work for me' as well as 'is it what I like'

Behaviour 5: seed the 'negative capability' field (Wordsworth) – 'fishing'

Encourage student to more freely explore new and diverse ways of thinking about context/self/other/issues

*'Isn't it interesting that despite all the razmataz about 'latest discoveries' and 'breakthroughs' in the press, there does seem to be an awful lot we've always 'known about' (well, 2000 years seems like 'always'). The issue then as now, is how to transform this spectator-like knowing about, into 'knowing how', 'knowing when' and 'knowing of' (in the sense of experiencing and embodying ideas so they become personal knowledge). This is where intuition is at a premium...Heifetz in his book *Leadership on the Line*, talks about leadership (as against management) being needed very much when people face what he terms an 'adaptive' challenge i.e. when nobody really knows the 'what' and/or 'how' of dealing with a situation, and some innovation is needed...obviously a risky endeavour...where 'embodied' forms of knowing are much more likely to work, as against book...learning being processed at an intellectual level.'

*'...sometimes outsourced workers have a stronger investment in the work of an organisation than the longer serving permanent workers...Doesn't this reveal something important about the nature of interaction between 'context' and 'individual'...?...we naturally seem to blame the individual if things go wrong and not look to explanations of a contextual nature - Malcolm Gladwell makes this...point about the 'fundamental attributional error' very clearly in...*The Tipping Point*...suggests we...look at this issue on a case by case basis, paying particular attention to the processes which influence or could influence motivation and sense of identity.'

Behaviour 6: encourage reflexive action/re-valuing tacit knowledge

Commend student's own 'informal' learning/knowing and propose further *inner* directed reflections to surface value and assumptional frameworks

'Maybe art offers the higher frame into which science fits.....Can you see how you are already or might be able to use one or more of these 'arts' in your own role, either as a way of understanding what's going on in a different way, or as a way of changing interactions which are not going well? One way to play further with this idea is to use the 'odd days/even days' formula e.g. on Mondays look at your experiences through the frame of 'science'; and on Tuesdays switch to experience these as potentially 'artistic' activities; on Wednesday back to science; and so on. See whether things do look different and allow other actions when you adopt the artistic mindset....?'

III EXTEND PERSONAL KNOWING

Behaviour 7: reframe understandings/conclusions

Positively reframe and connote what is seen as a weakness, barrier, or problem

'I would strongly recommend you do not lose faith in your primary 'acomodating' style - for this I read your 'intuition'. This is your foundation and your trump card so use it wisely...you work within a network full of these other capabilities, so mobilise these in the service of the task and keep your own powder dry for those tasks/events where your stronger grasp and feel for the political dynamics of the situation is critical

Behaviour 8: focus and deepen the inquiry

Offer a point of focus and suggest ways of persisting with and deepening the line of *outer* directed inquiry

'You talk about now having a better understanding of possible styles (and their antecedents/values/assumptions) and hence more able to 'compensate' for others styles' (shortcomings?). But you don't yet feel '...adequately armed to know just what to do about it.' Interesting the use of the warlike metaphor 'armed' to deal with a difficulty in communication - what the battle about! This seems to continue the presupposition of 'essentialism' - he 'is' like this and I need to deal with him using an appropriate contingent 'weapon'. Is there not the possibility of assuming all of this 'is-ness' is quite frail and only a 'showing' rather than a deep 'is-ness', allowing some mutual re-framing/co-construction to take place over time? ...Maybe his 'engineering-ness' could come out in different ways with some help? You might be interested in looking at The Leadership Development Framework...in this you'll see that the 'engineer' or technical expert can be seen as but one development stage in an hierarchy stretching from 'impulsive' through 'opportunist', 'diplomat', 'expert', 'achiever', 'individualist', 'strategist', 'magician' to 'ironist' and beyond. As someone who is probably journeying in the individualist/strategist transition zone, you will have within you all the 'expert' values and competences, so you'll be able to establish rapport with him - and you'll have richer options to use to help him move toward the 'achiever' level of thinking/action.

Behaviour 9: provide additional resources in timely fashion (multiple options here)

Affirm insights and conclusions and offer a range of relevant/associated readings which provide additional and/or alternative ideas to help expand the student's field of view

'The issue of being cruel or more trusting also seems to repay attention to context, rather than be taken at level of principle alone. Many who focus on creating good relations take eye of the ball of achieving outcomes and...lack the 'authority' that comes from focussing on the situation facing the group...reminds me of the work of the late Mary Parker Follett who talked about the 'law of the situation' - for more on notion that situation and everyone in it can be the basis for authority rather than hierarchy/ power see [http:// www.change.freeuk.com/learning/business/follett.html](http://www.change.freeuk.com/learning/business/follett.html)

IV PRESENCE KNOWING-IN-ACTION**Behaviour 10: encourage applying insights and the taking of action**

Affirm current thinking and feelings and suggest ways the student could translate these into practical action

*'One approach is to work from strength, both in terms of your 'everyday' work, and your concurrent 'development' work to improve the 'everyday'. Closing the office door doesn't quite sound like that! But like the 'more and better' fit for purpose response we came across a week ago (and in what ways was that an ENFP response?), you could ask

yourself what a more 'strategic' ENFP orientated set of responses might look like. So not working or 'competing' at the same level as others, but like your figurehead image above, working at a higher level in the service of the whole, to enable others to be more productive.

*'Can you see what further steps you might need to take to create practice situations where you can try these ideas out in your everyday work patterns?...convert what might be seen as just 'operational' activities/meetings...into a process which offers powerful 'development' experiences at the same time?...the 'close learning' concept...little or no separation between the two processes. Isn't that how it is anyway - the 'boundary' between the two just exists in our minds, is socially constructed: does our 'body/mind' really differentiate between the two as we go about our work?

Behaviour 11: provoke new behaviours and actions

Challenge current actions and suggest alternative ways of behaving through use of humour/teasing/irony/etc

'Perhaps, rather than using the combative tactics that have served you so well over the years on your climb up the hierarchy, it might be more effective to support/guide and demand more of these more rational/technical efforts of others with less experience than you. Don't fight them - ask for 'more and better' so that your intuitions can be tested against so called 'harder' data. You might see this as 'compensation' but equally it could be seen as shrewd use of your unique talents.

Behaviour 12: ask for evidence of influencing/being influenced

Identify new ideas/values/proposals/claims offered. Ask from where they've come and how these have influenced their thinking, and further with whom they've used these and how they assess any impacts

'Coming closer to home, what are the voices you're currently paying most attention to in your own PPP change? Where are the gaps and confusions in their claims to the truth? And what voices are not being heard, what is preventing this, and what might you do to remedy this state of affairs? Is this where your final question about '...the inner drive, motivation and attitude of the leader..' surfaces and needs to be explored: what could the contribution of the leader(s) be in this instance? (And how could you tell?)

META BEHAVIOURS – 'YIN AND YANG' OF KNOWLEDGE AND PRACTICE

These are influenced by the other 12 behaviours which constitute the 'responsive repertoire'

Behaviour 13: translate personal knowing into acceptable academic writing ('how to pass the MA')

Identify, illustrate, encourage, and formatively assess the standards of judgement and writing practices required for personal and local knowing to be accepted and legitimated in the public domain/Academe

'It may be the case that '...the further up the leadership hierarchy one goes, the more the innate traits come to the fore...' arguing for the trait perspective. But as you're doing an MA as well as improving your own leadership practice, you'll need to be able to convince others in proposing such a view - in a particular situation - that meets the criteria of academic validity. And that does also require some breadth and depth to your answer.

Behaviour 14: embody personal knowing in everyday practice ('how to improve leadership practice')

Identify, illustrate, encourage, and formatively assess the standards of judgement being used to guide embodied practice and working/living according to one's values

'I would volunteer that the main purpose of all this questioning and debate for you and your colleagues on the MA is to help you figure out - not once and for all, so perhaps I should say *help you keep figuring out* - how you can best contribute to leadership in the various situations you find yourself in. So all of these partial views about management and leadership can enrich and refine your perceptual apparatus so you have a broad palette of possibilities to consider in each time and place. And then to be able to debate these with others in the situation - after all it will in the end need to be a socially constructed, negotiated view of some kind if it's to work.'

APPENDIX 6A

How each behaviour identified above could be developed in a fuller taxonomy – an example

Behaviour 1: take steps to 'level' power relations in a knowing field

What is it? The late Australian narrative therapist Michael White used Foucault's ideas on power-relations to forge a novel way of dealing with the stultifying effects of asymmetric power relations. In one of his several books he devotes much time to what he called the 'de-centering' of the role of the therapist (White, 1990). He believed that it should be the client's experience and story that should be central and take the spotlight in therapy sessions, and not the therapist's supposedly superior expertise. To work towards this he developed a range of ploys to help himself and other therapists stay aware and take steps to reduce these unhelpful power differentials, and so to 'level the playing field.' This phenomenon is not restricted to therapy and is undoubtedly even more widespread in the field of education. Perhaps surprisingly this also applies when we are talking about mature individuals coming back to do a higher degree – hence the need to deal with these negative influences on learning 'in a knowing field'

What is the stimulus/context/emotion causing the response? (selected examples from the many)

- i) The very first log entry where student expresses satisfaction with the opening 'induction' event and enthusiasm for getting involved in the 'distributed (sic) learning package' (JW 091106)
- ii)
- iii)

What kind of response is offered by the coach? (selected examples from the many)

- i) Responds to enthusiasm but immediately frames the learning interaction as something that will take place both *between* us and the wider student group; and where learning will be *mutual* process where *we* can learn from each other – implying a level playing field
- ii)
- iii)

How is this response made – words/form/emotion? (selected examples from the many)

- i) '...feel we should have an interesting and rewarding time together...I've got lots to learn about leadership, change, and development from someone with the wealth of

experience and seniority that you have...we're all on the same level when it comes to understanding the mysteries of organisational life...'

- ii)
- iii)

What worldview supports/encourages this way of responding?

It is likely that mature students returning to higher education, will feel that the Academy and coach are the 'experts' and in a position to 'teach' them what they need to know about leadership. This has certainly been my experience on the MA (possibly provide some example statements here). So I believe it's important for the coach very early on to begin disputing and countering this form of asymmetric educational relationship in interactions with students as, as Foucault has pointed out in other areas (Foucault, 1977), this usually leads to the subjugation of non-mainstream knowledges. I count as a very important category of these, the amazingly diverse bodies of tacit knowledge held by every individual, that Michael Polanyi calls *personal knowledge* (Polanyi, 1983). Also I could mention the issue of 'negative capability' etc – what none of us know and so truly subjugated or invisible knowledges

Though he embraced the existence of objective truth (Polanyi, 1983, p. 16), he criticised the notion that there is something called the scientific method which enables science to supply us with truths in a mechanical fashion. Instead, he argued that knowing *is* personal, and as such relies upon fallible commitments. Our skills, biases, and passions are therefore not to be viewed as flaws but play an important and necessary role in guiding discovery and validation. In this view, observers cannot remove themselves from their observations and judgements, nor should they. It is enough that we all strive to act in accordance with the consequences that are imposed upon us by our beliefs, seeking the truth but accepting the possibility of error. As my supervisor Jack Whitehead has often quoted Polanyi: 'comprehension is neither an arbitrary act nor a passive experience but a responsible act claiming universal validity.' (ibid, p vii)

If the coach leaves this conventional 'teacher-student' relationship untouched, it's likely that the student will have difficulty or not feel the need to access, critique, value and utilise their own experience and associated tacit knowledge that is critical to experiencing their personal knowing. And without this, their experience and development of leadership is likely to not be of a depth and intensity that enables both values oriented and embodied performance in interaction with others to be influential.

What are the hypothesised effects/meanings arising – immediately/later?

(These will be my working hypotheses developed from a study of logs as a whole)

- that the student will start to feel they are not passive recipients but able to actively influence both the areas and the meaning of the learning they are seeking...and in fact, as the phases pass by, that it will be a kind of *personal* knowledge that they will create
-

What are the reported effects/meanings as assessed through later reflection?

(video clips from the interviews should provide and 'point' to what this interactive performance is about and what it means to students in terms of influence etc)

Examples....

What conclusions can be drawn from this communication exemplar?

(what light does this critical incident exemplar cast on the educational relationship between student and coach/programme?)

Examples....

Within this more level co-learning relationship, it is possible to help the student find their feet, gain confidence, and start to realise they have a unique voice, *if* the coach as the main protagonist of the Academy, demonstrates support and affirmation over time

All twelve plus behaviours could be treated in this way

APPENDIX 7

POTENTIAL HYPOTHESES/QUESTIONS

Potential hypotheses/questions to pose to the student's text

In analysing their narrative about leadership and development: what qualities, dilemmas, questions, learning, experiences are embedded in their logs and essays?

- Issues and problems they faced as students in HE, and as students of leadership
- Main dilemmas experienced, nature of losses and gains
- Understanding/framing of context and role(s) taken
- Strategies developed to deal with dilemmas faced and HE/programme issues
- What got out of programme – insights gained into self, models/theories of leadership, how to learn/develop/perform, and personal and organisation development
- How do they account for own learning – what would you use as evidence?
- What aspects of programme/process helped/hindered including role of Centre and coach
- Influence of back home context/boss/life situation
- Nature and level of learning/development achieved – linear/specific or emergent/diffuse
- How influenced by post-modern 'turn' about power/social construction/complexity/etc

(Note: all of these should be looked at as changes as a whole over time and within each phase)

Potential hypotheses/questions to pose to my responses as coach to student entries

1. What do I seem to notice and pay attention in their texts? For example – theories/models they use, work experiences/problems, learning needs, learning process, learning achieved, level of learning e.g. identity/values/capability/behaviour, level of understanding achieved, application of their learning at work, learning from praxis, their context(s) and stakeholder networks, their feelings/mood, achievements, what they seem to be concerned about, what they are asking of me, etc
2. Which of these do I get most interested in/excited about? Which do I tend to ignore?
2. What kinds of things do I offer them? For example – questions, reframes, new ideas, other models to explore, encouragement/positive connotations, critique, suggestions for new areas of learning, proposals to look at past/present/future, my own experiences and views, etc?
3. How do I offer what I offer – what sort of role/relationship do I seem to be offering, what tonality is being used e.g. humorous/provocative/ironic/teasing/doubtful, am I direct or indirect with them, provide single or multiple options?
4. What theories/models do I myself call upon e.g. power relations/complexity/tacit knowledge/etc to 'fill out' the learning agenda? How do I show/account for my own learning as part of this in terms of being influenced by various scholars etc
5. To what extent do I attempt to link things to what has already happened/what is happening/to what might happen, asking them to look back, look sideways, look forward? Did I give the impression that through this I'm paying attention to different perspectives, strands and time frames and 'nudging' students to do the same?

Basic questions for exploring reflexive biographies

1. How did I see myself (who was 'I') when I began the study and how did I regard leadership and development? What were the main models and ideas used to understand how leadership was accomplished, and how it was developed? How did I see myself as a leader?
2. What did I learn during the 18 months, and what influenced this learning? What were the main dilemmas and challenges I experienced in making the most of this development opportunity?
3. What did I find most enabling in helping me tackle these issues to do with learning and developing? How did I account for these influences? How did I use this learning to improve my practice/performance, and with whom?
4. In particular what role and contribution do I think the relationship with the coach and coaching process provided? How might I explain this? What evidence could I offer to support this?
5. What were the key learnings I gained regarding the practice of leadership and my own preferences and abilities to deliver this effectively? ; and what criteria and evidence did I use in deciding this? How would I describe and explain the impact of the academic theories and models I studied, and at the same time, my own experiences at work and the 'living' theory developed through learning from my own practice?
6. What results did I achieve in terms of influencing working relationships with others and their performances, and what evidence did I use to assess these impacts? How might I explain this process?
7. How do I now regard myself (who am 'I' now) and how do I regard leadership and development? What are the main shifts in how I experience, think about, and practice leadership work? What influence and effect do I think these changes are having on my performance and those of colleagues and staff? What evidence would I offer to illustrate and support these claims? What do I take forward as I continue my journey?

APPENDIX 8

‘Ontological’ indicators of progression?

I got this idea at the annual exam board for the Centre in 2009 where the newly appointed external examiner felt uncomfortable with the ‘lack of progression’ of student’s *marks* over the 18 month period of study prior to the dissertation. I very soon shifted this question to the issue of ‘progression’ not in terms of ‘marks’ but rather in terms of qualities/behaviours that would show signs of *development*. As a result I began to think in more detail about the different *capabilities* I was hoping to encourage in students through use of my e.g. the ‘responsive repertoire’: would any of these ‘qualities’ represent progression in valid ways, and could the language being used in logs and essays show this in some way? The standard academic criteria focus on scholarly aspects, and take little account of other qualities that are important in a situated practice like leadership like e.g. emotional maturity, strategic insight, dealing with complexity and so on.

I decided to see if I could track the development of what I thought of as ‘ontological skills’ which enable students to operate effectively under modern conditions of ‘supercomplexity’, requiring them to grapple with epistemic and ontological uncertainty and dislocation (Barnett, 2000). As mentioned earlier, there is support for this view in work reported by Bullough and Pinnegar: ‘The consideration of ontology, of one’s being in and toward the world, should be a central feature of any discussion of the value of self-study research’ (2004, p 319). Ontological skills that are more about *becoming* rather than knowing, can also be linked to Torbert’s ‘leadership maturity framework’ with its seven levels of action-logic or sense making, where he and his colleagues make specific use of the analysis of writing style to locate and ‘centre’ a person within their model.(Torbert and Associates, 2004).

And I was also encouraged by the practice-based research work of Furlong and Onacea who identify four main criteria by which to judge practice-based research. The one of most interest to me they call the ‘capacity to act’, a practical wisdom, ‘which involves the development of tacit knowledge and the ethical, interactional and critical dimensions of practice...’ (Furlong and Onacea, 2005, p. 14). This ‘capacity to act’ is characterised as making a ‘contribution to collective and personal growth of practitioners and policy makers: changing them as people through establishing forms of collaboration and partnership, increasing their receptiveness, reflexivity, virtuousness and morality. This they call ‘*capacity building and value for people* in terms of the development of tacit knowledge and of the ethical, interactional and critical dimensions of practice.’ (Furlong and Oncea, 2005, p. 10)

In supporting the claims to ‘practical wisdom’, the authors turn uncertainty and situatedness from being a weakness (i.e. lack of accuracy and definite knowledge) into a strength (i.e. ethical human encounters where virtue develops and is enacted). This they feel will support critique and collaboration for a better understanding of educational practice through the ‘enhancement of (ethically) authentic action rather than the accumulation of (theoretical) knowledge’ (ibid p. 14) They then list several factors that could be taken into account in judging whether research was meeting this ‘value for people’ criterion by encouraging e.g. partnerships, plausibility, self-reflectiveness, receptiveness, and so on. But they put this forward within a framing statement: ‘...because the roots of this dimension are in ethical concerns and in tacit, situated knowledge, it is extremely difficult to capture in the research appraisal process.’ (p. 14).

So it seems that knowledge about what is probably the most important of the four main criteria for practice-based research, is hidden below the surface embedded in the tacit dimension (Polanyi, 1983).

However, I believe it would be possible to use indicators of this kind to track progress in a student's thinking and action through a careful reading of what they are writing in logs and essays. Given the view that such standards of judgement are implicit in how one goes about work and will usually emerge *after* the doing (Lyotard, 1979, Polanyi, 1983) there seem to be some grounds for believing that properly focused collaborative reflection during a practice oriented education like the MA in Leadership Studies, may make a useful contribution to this area. It may be effective to hold focused face to face and/or telephonic discussions to assess this, or to use a tailored version of e.g. the online assessment tools developed by Questionmark. But in terms of taking this idea forward in the very short term, I could ask students to do a crude self assessment against whatever criteria I could distil from the literature and my own experience, by asking the question 'are you doing more of this now?' And then in a more systematic way, I could apply the more formal phenomenography approach to analyse logs and essays for textual evidence of such progress indicators. But I'm thinking now about something more informal which I could use on an 'as I go along' basis, and so what would be better still would be to use what students are writing each week, in a kind of 'virtual dialogue' with the coach, to help orient a coach to where students are/are heading in their development, and enable a more formative and timely version of responsiveness. These other methods could then be used to run checks from time to time on such ongoing more intuitive assessments.

These criteria/indicators which would be directly associated with the 'responsive repertoire' of the coach and the 'learning relationship' between student/coach that is created, are I believe associated with the kinds of *ontological skills* that are required to enable students to both make the most of their studies, improve their practice, and operate effectively in their workplace. These 'ontological skills' are more about *framing* and *becoming* rather than *doing* (or knowing) and so would allow students to transfer this kind of knowing 'how to go on' across different contexts, and so be more able to 'culturally navigate' through the 'complex ecologies' that Lee and Rochon refer to (see Chapter 2) . So what I offer here is a 'starter for ten' list of six potential 'indicators of progress' which I've intuited/distilled from a range of views on 'meta' indicators like those offered above by Furlong and Onacea, Barnett, and Torbert, as well as my own interpretation of writings in fields such as 'systemic thinking' and 'inclusionality'.

1. resilient - staying open to uncertainty/ambiguity *and* staying true to values (this could be to do with the activity of 'circumspection' that Rayner talks about).

2. receptive - seeking multiple perspectives, conflicting viewpoints, systemic consequences *and* being open to (patiently waiting for) emergent outcomes

3. rigorous - critically appreciating sources of information and understanding *and* being prepared to reach and defend judgements that you consequently arrive at

4. relational - open to the 'other', appreciating the negotiated nature of reality, being willing and able to be collaborative with others *and* taking responsibility for consequences

5. responsive - embodying ideas and intention in present action *and* being actively curious about consequences i.e. 'what what I do, does' (this could be to do with Rayner's activity of 'focus').

6. reflexive – reflecting on the meaning of experiences, both after, in, and through, *and* inquiring reflexively into the framings and values used to reach these judgements

At this early stage these are just stated as complex ways of receiving and responding and no attempt has been made to create 'levels' of capability such as those developed by Saljo in categorising students conceptions of learning (Saljo, 1979). And rather than framing them as polarities/dilemmas, I view them as 'natural neighbourhoods' which interface with and reciprocally inform each other.

As Rayner mentions in an e mail exchange: 'I know that this may seem very 'picky' of me, but I would like to suggest a move away from speaking about 'definitions' and 'defining characteristics' to speaking instead about 'distinctions' and 'distinguishing features...I say this because I feel that the distinguishing feature of the philosophical undercurrent of AR/AL is a move beyond prescriptive definition and the evolutionarily dead-ended, oppositional logic of 'the excluded middle', to the improvisational distinction and evolutionarily opening-ending, living logic of 'the including middle'. It transforms the stultifying 'divisiveness of decisiveness' into the hopeful co-creativity of post-dialectic, post- propositional complementarity (i.e. what I call 'natural inclusionality').

So could these qualities, or something like them, be seen as, if not necessary, then as desirable for engaging with and enacting what I might call the 'natural inclusionality' mindset? And could we develop an assessment method which would allow non-psychometrically experienced coaches like myself to 'read' signs of these kinds of indicators in the ongoing writings of students in their learning logs and essays? I believe I have been doing this intuitively but tacitly in how I've been responding to my students over the past years, without necessarily having these kinds of indicators foremost in my mind, or having a method of interpreting writings as e.g. Cook-Greuter and her colleagues do when assessing the level of achievement of people against their Leadership Development Framework. So that is the next step...

APPENDIX 9

MA in Leadership Studies Framing the '09 Revision of Phase 1

Here are a few preliminary remarks to help us develop a shared understanding of what we are trying to do, before we actually begin the revision work, initially on Phases 1-3 and then the remainder of the programme.

STRATEGIC ISSUES

What kind of programme have we got here?

To set the scene I'd like to start this opening review with two quotes from the Introduction to the MA Programme originally written by Peter Case, which I believe capture the heart of the programme:

Canonical concepts and toolkits will give way increasingly to what we term 'upstream theorising' of the relational processes of leadership (my emphasis). From this new perspective we can no longer treat leaders in isolation but have instead to understand their decisions and actions as outcomes (and effects) of a complex set of conditions and relationships

What we hope to create is a deliberately reflexive theatre of learning (my emphasis), in which your experiences – individually and collectively - will play the leading role. This entails combining the intellectual skills of systematic inquiry i.e. the posing of intelligent questions supported by academic study, with critical reflection on and changes in personal practice...essential that participants find meaningful ways of synthesising theory and practice.

To this I'd like to add a supporting quote from the article on the MA programme two years in and written by Ladkin et al and published in '09 in *Leadership*. This explicitly introduces the pedagogic idea of 'close learning' which I know from personal discussion was uppermost in both Peter and Jonathan Gosling's minds when they originally devised this online version:

Batteau, Gosling and Mintzberg define 'close learning' as follows: 'We refer to this design as 'close learning' because it is close in time and place to where the work gets done, the participants' leadership practice...close learning is concerned with knowledge that exists primarily in the mind-body relationships of the learner. (my emphasis) It is created and displayed in the way things get done—and in what gets done.'

From these underpinning ideas I am taking it that the basic purpose of the MA programme is the improvement of *leadership practice* through effectively creating a 'reflexive theatre of learning' (Case, 04) at or within the students' local contexts of performance through creating fruitful conditions for 'close learning'. While the current MA has a deserved reputation for quality education, I don't believe we have as a group yet fully understood and adopted these aspirations or found ways of using our resources to most effectively deliver a programme to achieve these ends. I think this will involve being much clearer about what these aspirations involve regarding our pedagogic practices, and then what we are trying to achieve in each of the phases and in each of

the learning processes like e.g. learning logs and essays, that we use to offer the materials, facilitation, and assessment. I see this timely revision process as a valuable opportunity to significantly improve the impact of the offering as part of reframing and renewing the programme as a whole

What overall learning/development model might we use?

How might we proceed to create this so-called reflexive theatre of learning? This I believe will come from students experiencing a full, intimate and synthesising exposure to three ‘domains’ of experience and knowing: *literature* and familiarity with the contested nature of the field; *self awareness* and familiarity with one’s values, assumptions, and behavioural patterns; and *practice* with familiarity of the subtleties and challenges of improving one’s own practice and influencing the practices of others in local contexts. I’m basing this three part framing on my own experience of the MA and also the CLS exposure (Jonathan Gosling, Michael Walton, Val Brookes, myself) over several years to the very effective Leadership module on the SIMI Exec MBA where we are external examiners.

In addition, given the tools at our command it’s probably useful to think about four main ‘streams’ of learning:

- Stream 1 we might categorise as *learning from reading* as students read the phase notes and recommended readings and articles
- Stream 2 we might categorise as *learning from writing* as students carry out various exercises, both directed and personal, in the learning logs and essays.
- Stream 3 is the most interactive of the streams and we might categorise this as *learning from conversation* as coach and student exchange views online, over the telephone, and face to face, and students participate in the Discussion Forum
- Stream 4 is the stream that occurs in practice in the local work context which we might categorise as *learning from doing*

In combination with the ‘vertical’ *domains* of experience, these ‘horizontal’ *streams* of educational activity create a ‘learning matrix’ in which students assisted by the coaches, will be able to create high quality ‘close learning’ conditions which will enhance their learning, accelerate their development, and enable improved performance.

	Theory/Models	Self awareness	Application/Practice
Reading to learn			
Writing to learn			
Conversing to learn			
Doing to learn			

How might we structure and organise this learning during the programme?

One of the key tasks of the ‘revising/coaching group’ will be to find a balanced way of organising and facilitating the use of Phase materials on WebCT to make the most effective use of these pedagogical tools. One initial idea is to treat Phases 1-3 (the Certificate) as a *single learning unit*, and apply the learning model not phase by phase or week by week, but across the Certificate as a whole. Our design/revision task is then

to find interesting and enlivening ways of helping students experience and learn within each of these learning spaces by distributing them appropriately across the whole unit.

Looking at the ‘natural’ emphasis of each of the first three phases, and with this idea in mind, a first thought is to use Phase 1 to focus more on questions of ‘self awareness’, Phase 2 to focus more on the domain of ‘theory/models’, and Phase 3 to delve more deeply into issues of ‘practice’. In actual practice, all three domains will be touched on in each phase/week but in this framing, Phase 1 will encourage students to initially focus on and value their *own* knowledge – of self, their leadership practice, and their own local context – as a grounding point of departure for their learning journey, rather than the mass of seductive ideas that the academic world might put out. Phase 2 will then encourage them to turn outwards to become more critically engaged with what others have to say, learning that there are ‘many ways/not one way’, meaning they will have to make choices. And Phase 3, with the question ‘how is leadership accomplished?’ to focus inquiries, will encourage them to look at and make sense of the uncertain and messy nature of ‘what is’, with both their own knowing and that of the academics at hand to help with this task.

Another ‘structural’ idea is that we should treat the Certificate - as other programmes do – as requiring a ‘transition’ or a ‘finish’ essay, with a slightly different emphasis on what is required, depending on whether or not people are going on to do the Diploma/MA immediately or not. This would also encourage us, particularly in the light of the new programme schedule, to provide a proper finish/celebration for those people just doing the Certificate.

What are the central ‘learning spaces’ we really need to get right?

In my view there are three activities which lie at the heart of the ‘reflexive learning theatre’ that Peter referred to. These are the everyday informal *Learning Log* interactions between student and coach, the more formal ‘conversations’ that frame the *Essays*, and the more free wheeling interchanges in the *Discussion Forum*. As part of this revision we should look again at how we use these learning processes and how we assess and go about improving our performance in each.

Learning Logs: these constitute the central reflective learning/coaching mechanism on the programme. At the moment they are dominated by the ‘directed’ form of log instruction which tends to focus more on the ‘academic content’ side and less on the ‘practice/personal’ side of experience and development. There also appear to be far too many such logs – many of a routine nature - which distract students from the more personal forms of reflection, and coaches from helping students improve their work and academic practices and performance.

It would make sense to carry out a thorough review of all the logs on the programme, what they focus on, what influence they seem to exert on student thinking, and what educational effects they seem to produce. I personally would prefer fewer logs that are targeted to cover the three ‘domains’ of experience more evenly, and that encourage students/coaches to find ways of identifying and then working systematically on a few central practice development themes over the course of the programme.

As it is such a central activity, I also believe it would pay us to review the purposes of these interchanges, and establish some standards for assessing the quality of learning log work, both for students and coaches, against these. They are not, in contrast with

essays, assessed and marked for examination purposes but are too important to be just left to individual preferences. And though they are essentially formative in nature, they can and do contribute towards the more summative aspects of the programme.

Essays: together with the dissertation (for those doing the full MA), these constitute the main means for assessing and grading student work. Accordingly we have to meet agreed academic standards in how we establish internal consistency in how we go about this activity; and at the moment we appear to be meeting such standards. However with the 'renewed' purpose identified above, I think we may need to refocus some of the questions set (see e.g. my suggestions for the Phase 1 essay) to take into account more clearly the three domains of experience.

As with the learning logs, we as a group need to agree our general approach to how we work with these pieces of student work to meet the summative as well as formative aspects of assessment, and then devise ways of monitoring and improving our performance. Some now rather dated ideas which might be form a useful starting point for this work appears in my brief paper entitled MA Marking Practices July 08, a copy of which is attached.

Discussion Forum: in his Introduction to the MA Peter Case remarks: '*Feedback from past participants consistently indicates that the single most valuable aspect (my emphasis) of this programme is the encounter with other practitioners with whom questions of leadership and organizational solutions can be shared and explored. Accordingly, we create supportive spaces throughout the various study phases in which this encounter and mutual development can take place.*' This does indeed present a major challenge for us as we have never really succeeded in achieving a satisfactory and consistent level of interaction within any student cohort. I won't comment further here other than to say that I believe we need to make special efforts early on during the first three phases of the programme to raise interest levels and improve the quality of interaction...and then hope that enough students will find it to be a worthwhile, even if not the most effective, medium for learning. I pick this up in my proposals for Phase 1 later in this paper.

With these more strategic ideas which influence how we think about the reshaping and revision of the programme as a whole, out of the way, I turn to my initial ideas about the revision of Phase 1.

REVISION OF PHASE 1

Critique of current arrangements

I don't think the current phase offers a particularly good launch pad for the MA; for example:

- It provides a rather dull beginning focussing more on bureaucratic university oriented processes e.g. the student handbook, than the central topic of leadership,
- It allocates a lot of time to undoubtedly essential but technical matters like library access
- By devoting two full weeks to psychometric and psychologically oriented measures of personality e.g. learning styles and MBTI, it places an undue emphasis on an individualistic and 'social science' view of leaders and leadership.

- It also does not work hard enough to bed down processes which are key to the success of the programme, like coaching dialogue around learning log work, and discussion forum interaction between students
- It provides little help for students to place the notionally ‘academic’ education of the MA within a larger developmental and career frame, and then identify initial development goals... beyond the implicit goal of ‘just’ getting an MA!
- The final essay topic continues to emphasise an analytic and fragmented approach to development – talk about theory/talk about yourself – and does not provide a proper opportunity for students to start work on the important processes of synthesis, wholistic thinking about ‘self-in-system’, and taking charge of ones own development.

There are however many good parts which need to be retained and built on – like the interviewing colleagues at work about leadership in the first week, the initiation of reflective practice through the writing of learning logs, the introduction of a social constructionist oriented theory about leadership which links leaders to followers and context, and an introduction to the important moral dimension of these studies

How do I now see the key aims for Phase 1?

With this brief critique in mind, here is a proposed set of aims for this introductory phase:

1. To model/embody the kind of learning programme it is so students ‘get the message’ early on and become curious/excited/start to feel responsibility for the journey ahead
2. To introduce, provide experience, and offer feedback on all main aspects of the learning structure, systems, processes, and activities
3. To focus particularly on the ‘self awareness’ stream by encouraging students to get a better sense of self e.g. values, assumptions, behaviours, as the place to start their learning adventure, and to help them create an outline development frame/strategy to guide their learning during the period ahead
4. To introduce the grounding idea and basic practice of ‘learning as reflection *on*, *in*, and *from* action’ and the implicit notion that we all need to be ‘inquirers/researchers’ in this process of becoming better contributors to how leadership is accomplished

These aims are probably self explanatory but I would like to identify in more detail what I think we need to consider in Aim 2 – the *experiencing of the key educational elements* of the programme. What might this involve in a more developed form?

- Being able to access/operate main elements of the WebCT system incl. Library
- Being critical of sources of theory, models, etc i.e. becoming critically engaged
- Applying approaches, theories, and models in one’s own practice
- Reflecting on reading/behaving experiences and capturing in Learning Logs
- Engaging in ‘reflexive critique’ of ones own reflections/writings
- Receiving and responding to Coach feedback in logs/telephone calls
- Taking part in the Discussion Forum and reflecting on its working
- Constructing/supporting an academic argument and/or claim as part of an Essay

By the end of this phase students should have a good idea of all of these essentials and we should be more aware of where we need to provide particular support to the group and to individuals.

Brief Review of Current Content and Ideas to be Considered for Inclusion in Revision

<i>Week/Theme</i>	<i>Current Content</i>	<i>Ideas for new content, processes, materials, exercises</i>
1 INTRO	Interview colleagues List hopes, fears, etc Read the student handbook	Build on interviewing of colleagues to spark process of <i>personal inquiry and knowing</i> , and use this to introduce the research perspective through a brief review of ‘interviewing’ as a research tool (Stephen Kvale text). As a stimulus to thinking about ‘what kind of leadership do I want to practice’ offer a range of short intro readings about different models
2 LOGS	How to use logs Pedler format	Emphasise <i>reflection</i> as major development tool using work of Schon, and differentiate between reflection and reflexivity. Clarify purposes and differences between ‘directed’ and ‘personal’ logs with examples of each for coach to review. Use the latter to tease out insights into images of preferred leadership approach
3 SOCIAL ID	Leadership as cultural Social construction	Linking to personal knowing of Week 1, introduce idea of <i>different ways of knowing</i> i.e. ‘objectivist’ and ‘social constructionist’, and provide articles of both persuasions for critique. Use this week to generate interest in using the Discussion Forum to explore this ‘content’ issue (include some coach moderation of these discussions)
4 STUDY SKILLS	Reading and writing Online journals Referencing Making critical notes	Introduce the idea of <i>critical engagement</i> with sources, and use ‘online search’, ‘referencing’, etc to energise a first attempt to create a ‘critical note’. Emphasise that ‘writing skills’ will be worked on throughout programme. Introduce Minto’s ‘pyramid principle’ of structuring essays. Continue emphasis on Discussion Forum, this time exploring ‘process’
5 LEARNING STYLES	Kolb model Learning styles	Broaden topic to include a wider range of ideas about learning, revisit Schon and Argyris work on ‘double loop learning’ and introduce Torbert’s triple loop approach to action inquiry. As exercise ask students to assess work on Discussion Forum in terms of one of these models and how they/we might improve levels of interaction
6 MBTI	Personality (Psycho) MBTI	Broaden to include a wider range of ideas about personality and finding out about it e.g. LDF, 360 feedback, biography, etc. Initiate a first go at a ‘development biography’ which can be worked on throughout using the ‘personal log’ stream. Ask students to do an exercise on identifying their values. Introduce the Boyatzis model of self directed development.
7 ETHICS	Ethical dilemmas	Continue work on values and contradictory behaviour. Personalise the work on ethics by focusing on ‘dilemmas of development’ as a precursor to creating a PDS

		(personal development strategy). Introduce Buckingham's work on 'developing strengths' and Kegan and Lahey's approach to addressing 'competing commitments' and working on these
ESSAY	Two questions <ul style="list-style-type: none"> • Theory • Learning 	Respond to the question 'how do I improve my leadership practice?' synthesising thoughts about goals, 'personality' preferences, approach to learning, and how to 'go on'

* * *

I hope these notes help us in getting started on the framing discussion about the nature, scope, and intent of the changes we are about to contemplate making. I look forward to our opening conversation on Wednesday

Keith Kinsella

06 July 2009

PREFACE TO CHAPTERS 4, 5 AND 6

APPENDIX 1: POSITIONING REMARKS

To help the reader make the transition to a different kind of argumentation, I am providing in this appendix, some background information to the kind of evidence, reflections, and interpretation that I will be employing in these later chapters. This material falls into four main sections:

1. Using material from my work with students who have helped me:

While I have a wide range of students and student work to make use of in these chapters, I've decided to focus on the work of three students in particular to illustrate the points I want to make. I've selected these students because their written work and my subsequent interviews with them offer clear illustrative material and hence more visible support for the claims I'm making than some others. I also decided on the limit of three so that the reader can see the development progression these students engage in over the two year programme, as though I focus particularly on the work of one in each of the chapters, their work appears in all three chapters. I do offer evidence from other students in each of the chapters as appropriate but don't offer the continuity that the selected three main cases offer. Having selected the three main students from different cohorts between 2005 and 2010, this is how I've organised the materials:

- *Chapter 4:* the focus here is on the momentary 'fleeting moments' of educational influencing that I believe initiate important learning and development activities. Here I use John's work as the main example of this phenomenon, and provide shorter examples using the work of Colleen and Ian
- *Chapter 5:* the focus here shifts to the medium term 'development episodes' that I am proposing follow certain fleeting moments and which allow students to develop the inner resources and outer skills required for such a 'reaction' to become a more fully fledged language-game. In this chapter I use the work of Colleen as the main example with further support from John (the prime example in Chapter 4) and Ian.
- *Chapter 6:* the focus in this chapter is the 'reflexive biography' which captures the longer term and deeper development of students thinking and leadership capabilities. Here I use Ian's work as the prime illustration, with John and Colleen in support.

So for the selected three students the reader should be able to form a view as to how these three influencing processes – short, medium, and long – are produced and have effects in their development over the period.

2. Making notations in the text to indicate the nature of the entry – *what, who, when?*

The educational process of this programme is strongly focused on helping students learn from various kinds of reflection: on theory, on the application of theory to practice, and on the theories guiding praxis. Further whatever emerges from these reflections is

assumed to be a *story* about experience and not a factual description of a single reality. So students are then encouraged by their coaches through various responses and interventions to enrich their appreciation of these original perceptions, descriptions, and explanations through further storying and re-storying, thus building up a thickly layered and nuanced understanding of their knowing and practice. To show the nature of this interactive process in the excerpts of textual material I offer from learning logs and essays, I use the following colour coding to indicate who is doing the writing and when, and any other positioning details that I think might be helpful to the reader:

Highlighted – admin details/instructions for learning log

Black – the original text of student in response to question/task set above

Black – original ‘embedded’ comments by KK on student’s learning log/essay

Highlighted – the key words/phrases that caught KK’s attention when responding

Highlighted – the key words/phrases that constitute the influencing response

Blue – reflections by KK done at a later date while reviewing the interaction

Aqua – positioning and linking commentary by KK to indicate what happened next

Green – reflective comments added by student after reading these excerpts

An example of a learning log interaction using this coding

Topic: Week 5 - Activity 4 - Learning Log
Subject: Use of Kolb ‘learning styles’?

Date: Tuesday, 11 November 2008
Author: Keith Kinsella

Hi Ian

I’m trying something different this time - putting my comments/thoughts in your text as I read through it. It’s something I do when I mark essays and I hope you might find it useful here too. The remarks are embedded in your text, so they are ‘in context’. Let me know what you think!

In my role I have to attend many meetings. Some I chair and others I am there as a participant. I have been on numerous courses relating to holding **effective meetings** and have a **fixed idea in my mind on how they should be**. E.g. purposeful and to the point, following a fixed agenda and producing the desired outcomes, with actions assigned to individuals to set timescales. Finally, when necessary I arrange a follow up meeting to check progress. The meetings I chair follow this format. The kind of meetings you prefer to run are but one kind of meeting, principally to do with short term decision making and follow up. Your approach may be very effective for these kinds of meetings but unsuitable for other kinds of meetings where you need may more participation, creativity, deep reflection, learning, and so on. And further, meetings are not held for purely ‘technical’ reasons e.g. making decisions. **What about the emotional, social, and symbolic work that needs to be done to keep the organization alive?**...Having recently completed an MBA I suspect that Ian is overcommitted to the pursuit of ‘task’ and ‘technology’ - so here I raise a question about other important dimensions of performance

...What is also a concern is that when I am chairing a meeting (and in control) I could be alienating attendees by not going into the level of detail they require to give their opinion and therefore be making decisions that are not based on all the information.

This is a good insight that you need to check out with others either directly by asking, or indirectly by changing your style and noticing what happens...

My main intention behind this response, apart from trying out the ‘embedded comments’ tactic, was to encourage him to be more forward in asking others for their

And to go further, once we've had the opportunity to *see* what we've said (shown) we can certainly write more richly and penetratingly than we've previously written!



<http://www.youtube.com/watch?v=o6PiA7txcuk> - *presencing developmental possibilities part 2*

4. Developing 'artifacts' to help readers see/'stand in my shoes':

It's usually important to get in close, get 'hands on', to an idea/approach, and /or stand in the other's shoes, before stepping back to comment and critique. What I do in Chapters 4 to 6 is offer just this – a review of key ideas/experiences that have led me to look at the situation in that chapter in the way I do, so you can 'step into my shoes' for a moment, before reading and thinking about what I have to say. I review this basic idea in the first part of Chapter 5, and so here offer a briefer summary of the main ideas.

- while Polanyi focused primarily on the relationship between the body and language, the Russian philosopher Ilyenkov went a lot further to take account of *all* kinds of what he called 'artifacts' including invented objects like dwellings, weapons, utensils, tools and technology. As Burkitt reports, Ilyenkov 'sees thought as movement and action within reality, aided and mediated by artifacts.' (Burkitt, 1999, p 79). So according to Ilyenkov, it is artifacts *as a whole*, not just language and the body, which transform our human bodily experience of the world around us
- in conventional training programmes we might refer to the new concept or skill that is learned as transactional in nature, with 'banking' being a common metaphor: something bounded and known is handed over in a linear manner from one who knows to someone who doesn't, usually for a fee that places a value on the expert's expertise. The development of the kind of situated embodied knowing that I'm talking about here, is complex and not completely knowable in explicit terms: it is transformational in nature and cannot be absorbed through a 'training' process. Instead I now regard the *creation of new artifacts*, as a more fruitful way of looking at this kind of development process.
- My experience has been that such deep development work takes place largely at a tacit level, as one goes about one's everyday activities. Thus to take one of Polanyi's examples, the blind man soon begins to regard the end of his body not as his hand but as the point of his white stick. In a similar way, more abstract frameworks like say, family therapy's 'systemic thinking' or my own 'rooting in the present' are able to extend the individual's reach and influence well beyond

his/her physical body, and allow us new and more complex experiences of being-in-the-world.

At the start of each chapter, I've elicited from inquiring into my own evolving practice, a way of looking/valuing or 'artifact' (Ilyenkov, 1977) which offers readers a means or 'perceptual extension' to seeing and understanding these materials as I see and understand them.

CHAPTER 4

APPENDICES TO CHAPTER 5

APPENDIX 1: excerpts from John's Phase 1 essay

John - exploiting 'ask for more and better'

Excerpts from the Phase 1 Essay submitted on 15 December, 06

Page 1 This essay is very supportive of the greater awareness and personal development enabled by what the Centre for Leadership Studies has described as “close learning” – that delivered at or near the workplace and relating directly to it. **This support is fulsome and sincere.** I have already gained significant insight and benefit from this course of study and I feel confident that this trend will continue. That's very encouraging, coming from someone who's seen a lot of this kind of thing

Page 4 Greater reflection and analysis of these and subsequent assessments, in particular the most recent ones conducted in Phase 1 of the course, have enabled a **discipline and rigor** in my self-analysis that was previously lacking. What do you mean by 'discipline and rigor'...and what do you think has influenced this shift? This in turn has permitted **greater confidence in my leadership role and a willingness to interact differently with my management team** and other subordinates and stakeholders. I have begun to experience a conscious and continuous ability to build on identified strengths and compensate for weaknesses. this sounds like an exciting change – could you develop the story more as we go along?

I have begun to engage more willingly with my workforce at all levels and spend more time listening to their concerns and issues. I am aware that I need to be more rigorous in time and work management and immerse myself in more detail with management analysis and performance metrics where I have previously been loathe to become involved. In this respect **I have learned to ask for the information in a different construct** which makes it easier for me to understand and utilize the information presented. Finally, and importantly, I am finding my relationship with my senior management team more fulfilling as I am **better able to identify their strengths and weaknesses and develop the whole team to better effect.** I had not imagined such tangible benefits would be so obvious at such an early stage in the course and I am sure that these **practical steps**, that I am beginning to take, will be complemented by numerous others as the course of study progresses. This looks like impressive progress. To really understand what you mean, I would have liked one or two more practical examples of e.g. 'develop the whole team'

It is perhaps typical of my own learning style, the “accommodating” one, to wish to lead, take risks and initiate ideas such as **introducing NLP and Kolb into the training structures** and processes within the organization. how does your MBTI support/modify this view? I am firmly placed in the accommodating quadrant but now have the advantage of **recognizing the need for divergent, assimilating and converging types to deliver** that vision through brain-storming the problems, sanity-checking my direction, analyzing issues, developing models and theories and securing resources. The Kolb Learning Style Inventory model has already been of considerable assistance in understanding (I use that word rather than recognizing because I always knew they were there) my own shortcomings in the more structured, analytical and theoretical fields. This

is a very important insight: leadership is always 'leadership-in-context' My week 5 Learning Log clearly exposed my own shortcomings with regards to my role in the Public Private Partnership work:

Page 5-6 I am also facing another issue at the moment in that my strong practical and subjective views are being subordinated in the evaluation to detailed analysis, scoring and financial investment appraisal. I have strong gut instincts about the most sensible way forward and this is tending to clash with the outcome of the more objective work. It is always too easy to then discredit the detailed analysis as being based on flawed parameters and weak complementing methodology. I have a habit of criticising such process but without the skills, time, knowledge or patience to suggest alternative methods.

In response to this observation I much welcomed comment from my tutor which was:

I would strongly recommend you do not lose faith in your primary 'accommodating' style - for this I read your 'intuition'. This is your foundation and your trump card so use it wisely. You're right of course to talk about the relevance and application of other styles (like AC) according to the 'level' of work and the particular phase you're in - but you work within a network full of these other capabilities, so mobilise these in the service of the task and keep your own powder dry for those tasks/events where your stronger grasp and feel for the political dynamics of the situation is critical. (Kinsella 2006)

As a result of this study and dialogue, an occasional sense of frustration has been mitigated and I feel that I am better acknowledging and utilizing my skills. I am certainly more aware of the strengths and weaknesses of my management board and have already started to more consciously play to their individual strengths and mitigate against their weaknesses. I have a better rapport with my PPP programme team, and a greater sense of balance and harmony now exists within the handling of that very complex project. Could you identify root metaphors for the before and after of this shift in perception?; what really has been the nature of what seems like a significant shift in your role idea and sense of identity?

Looking at these excerpts from the essay suggests that the 'ask for more and better' move did more than just register momentarily: he seems to have felt supported enough ('support is fulsome and sincere') to have taken new action to follow the idea through in a practical way. In doing this he has found a new way of dealing with his dilemma of 'trusting his gut instinct/using detailed analyses of staff'. This has allowed him to build more confidently on the strengths of his staff, leading to a more collaborative ethic. What's not clear yet is how he went about influencing the quality of interaction in 'level 2' detail discussions, and how this enabled him to rely more on a better informed gut instinct for the more strategic 'level 3' debates. Despite this gap, the intervention does seem to have been timely and framed to help him take practical steps in the situation facing him. It seems to have allowed him to translate the general 'more and better' injunction into an immediate and practical set of conversations where he has been able to more confidently use his ENFP/CE-Accommodator preferences to advantage.

APPENDIX 2: excerpts from Colleen's learning logs, essays, and notes with KK comment

Colleen - moving beyond 'stark choices' to ...

Week 1 - a response to Whitehead quotes about education vs training

Whitehead's quotes evoke strong emotions. Previously a teacher, I can interpret 'education' in the pedagogical sense, but I consider it as an **exploration of the opportunities and choices open to us**. Whitehead was controversial, considering his time and contemporaries, and I respect his comments. As an individual involved in organisational development, whilst Whitehead's phrase 'brief orgy of exploitation' sounds melodramatic, it encapsulates for me behaviours witnessed in leaders who have tasted and abused power. 'Low behaviour' often benefits them, but **destroys and humiliates** others. The quotes reflect the issue that **leadership brings with it ethical and moral dilemmas** - that is its challenge.

I have found the **impact of leadership courses**, however effective, to be **minimal**. I may leave enthused and inspired, but the experience disappears when the reality of work, and cynicism of colleagues, turns a positive experience into a disappointment. The university programme will engage me in an ongoing, holistic sense, allowing me to question, challenge, and develop confidence in my own intuitive style of leadership which does not meet the 'norm' in my field. **I am tired of compromising**.

Comment added by Keith Kinsella

What a terrifically passionate start to your learning log entries - I loved reading what you had to say! Yes, I too tired of what you call 'low behaviours' and the short term rewards that accrued to those that practiced these, claiming all the credit (or worse, having it claimed for them - those damn writers who claim that it's just the leader who does all the good work!)

Have you by any chance come across 'critical theory' in your studies so far? If not I think you'll find this philosophy will chime very much with your feelings and views. It's not something that the MA programme materials deal with - but if you're interested I'll offer a few places to start....

Your feelings about the impact of courses are unfortunately too widely experienced. It's not just a problem of the course itself but the framing and contextualising of these courses within a broader approach to influencing the culture in which performance needs to be altered...Being on a longer term programme will definitely help, giving you the time and space to puzzle out how you can make those changes to your own context that will elicit and support the new actions you might want to take.

Here I begin by responding and affirming the emotion she shows – something many online students find difficult to express - and encourage her criticality, indicating we could explore something like this if she's interested. I also introduce the idea of using

framing and influencing context as key aspects of exploiting learning and implementing change. I also imply she's got time and she'll need to puzzle things out for herself.

Week 1 - An extract from a list of 'objectives, expectations, and concerns'

My Concerns for the programme are:

1. My intellectual ability - **am I good enough?**
2. My organisation may not support me in the way that I want - this is **seen as 'training'** whilst **I want it to be a key part of my role at work** - and given appropriate opportunities
3. That the e-mail/internet access will fail/crash – from either side!

Comment added by Keith Kinsella

Take it from me - you're good enough! We are led to believe by many in academia/consulting world that knowledge is a 'universal' thing, can be 'packaged' and then offered to all and sundry whoever they are and wherever they may be. In contrast, others believe knowledge is essentially a local/personal thing, something that must be experienced and embodied within a context of application. If we assume that there is some truth in both assertions don't underestimate the wealth of knowledge you already possess by virtue of your own life experience. And not just the explicit things you 'know' but all that tacit knowledge you can already call on.

Maybe this programme is as much to do with you accessing, developing and streamlining this knowledge more effectively, as getting to grips with lots of knowledge 'out there'...And to help with this, we should make a point of framing what you're doing in the MA as being central to what you're doing in your role at work. To mis-use a phrase used by one of my professors at Bath, Judi Marshall ('to live life as inquiry')...to live your role as though it were the *central* point of your study.

I continue to affirm her inherent capability, encouraging her to learn to value her own tacit knowledge, and to think about the MA not as an academic programme, but as a means of working on her life and work challenges

Week 2 - extract from a vignette about experience of a difficult situation at work

Emotionally a 'fight or flight' reaction. Felt like an antelope being stalked by lions. Started to feel **humiliated**, with a knot in my stomach... I realise that I can get through by utilising my **acting skills** of pleasantness, being aware of my body-language and standing tall and remaining open... having incorrectly assumed that being well-prepared and innovative in my approach to the task would enable me to reach a compromise... I acted intuitively to rescue the situation and bring it to a conclusion, but feel that my behaviour again belied my inner feeling of **desolation**. I was not happy with the situation, but knew that to remain within the systems I **had to stay within its boundaries**, and altered my behaviour accordingly

Comment added by Keith Kinsella

You write very powerfully about your experience - I can just sense the feelings of discomfort welling up in my stomach as I read your words - 'humiliated'...'totally unsupported'...'desolation'...

You show considerable ability to trace the movement of your changing emotions, and awareness of what effects these have on your behaviour - a key ability. What enhances this is the skill to also be able to reflect on this process as it is happening, and choose to understand and change your behaviour in the moment. This is what Donald Schon (The Reflective Practitioner, 1983) called 'reflection-in-action' - the ability to learn in the

moment not only about how to correct problems but also to question the frame you are using to do this... Your recovery behaviour after the CE's volte face show you are already working at this level.

We should also look at the ideas of Heifetz who has lots of good advice to offer to leaders who choose to take the risks involved in change and innovation - as you clearly were trying here. I'll offer a reference or two if you're interested

This week's activity has plunged us deep into one of the central areas of academic debate: when we think about 'emotion' - do we have 'inner states' we can discover and 'get in touch with' (the realist position)...or is what we experience much more to do with what we in social interaction with others, construct through our 'emotional talk'?...Often our engagement is ambiguous and the feelings we sense often ambivalent.....so a friend might convince us that we've been 'humiliated', have become a victim etc: here we see the socially constructed aspect of emotion coming to bear. Someone like John Shotter (in *Texts of Identity*, 1989) would say that emotions are a reality that is constructed between a person and his/her world, in a process where we both 'make' and 'find' our worlds...

Here's towards less humiliation and more appreciation!

Though she is very aware of them, Colleen clearly feels wary of being open about her feelings in her organisation, and the 'career' risks involved. Here I continue to appreciate her readiness to work with these, but begin to question her assumption that these are things that are 'real' and can't be altered (or at least her response to them altered). Given the very strong emotions she is experiencing, like humiliation and desolation, I'm trying to get her interested in what the social constructionist perspective might be able to offer her. I also trail key ideas of Schon and Shotter for later reference.

Week 4 - 'dear diary' entry not in response to set work

I am supposed to keep my thoughts on track and I have to say....I am still worried about...time...am I good enough....how can I become the leader that I desperately want to be again? How do I manage the stress of it all?

I am probably at (one) of the many most stressful moments of my life.....**Can I achieve the greatness that I want aka achieving the MA...**when the going gets tough, the tough get goingand I am going...

Thank you, learning Log, for listening

Comment added by Keith Kinsella

As a privileged member of your learning log, I am listening, although in this instance rather a lot of days after you spoke - so I'm sorry about that.

When the going gets tough, the tough.....well sometimes the tough just sit quietly contemplating, girding their loins for the battle, and preparing the ground for success. And then get going when the time is right/ripe... you've got plenty of it in the MA, and though there is a lot of 'stuff' you can look at during the journey, it's not essential. What's important is for you to learn to appreciate and use with confidence all that tacit knowledge you already have - which is far more than the MA's 'body of knowledge'

could ever offer....but it could help you access it and enrich it.

You are certainly good enough to get the MA...so let your concerns focus more on the challenges of your real life out there and let the MA become a support not a burden.

Here I continue to affirm her basic ability and encourage her not to rush to action but to take her time. I sense she's panicking a little with all the MA 'knowledge' she 'has to' absorb, and seek to relax her a little and invite her to consider using the MA for her own life purposes.

Week 5 - a response to a question about the match between Myers Briggs Type and work role:

...This is an area that I am particularly interested in as the time comes for a restructure in my organisation, where all staff, including myself, will be put at risk of redundancy if redeployment is not a possibility. Will I allow myself yet again **to be herded** into a role to pay the mortgage, or to so I **hold out** for a role that suits my learning style, with the implicit **risks to employment**?...

Comment added by Keith Kinsella

... **You pose stark choices**: mortgage or harmony?; being herded or holding out? Hopefully there is more of a choice than this...even in the tightest bureaucracies there is usually scope to create mini-cultures where one can keep paying the mortgage while being a little different to the prevailing norm; and where you can hold out for something while being herded. Can you think of ways of breaking up these simple black and white distinctions that seem so depressing, to generate a bigger range of more complex options that you might be able to create in your and others minds?

I now begin to notice the polarization that seems to characterize her thinking and remark upon it – you pose 'stark choices'. I also challenge this, suggesting that there is always some room beneath the 'gaze' (Foucault, 1977) for more creative and less conformist behaviour, and encourage her to try and generate more choices for herself.

Week 5 - response asking for 'lists' of qualities in ideal leader

...Having struggled long and hard with the 'nature/nurture' debate whilst training to be a teacher, I agree with the premise that **behaviour can be changed but personality cannot**. Somebody pretending to be humble becomes obsequious, leaders behaving uncharacteristically in public are usually 'outed' at some point by an aide or confidante. In addition, look for the exhausted leader – I know to my own detriment that **to be untrue to my values** and principles is ultimately physically and emotionally detrimental!...

Comment added by Keith Kinsella

...What your ideas illustrate for me is the essentially relational nature of identity and behaviour. We are not isolated individuals acting 'on' others but rather fellow travellers taking part 'in' various activities within relations - and what happens is a result of the particular 'us'-ness that we co-create together in the moment. So we need to see our own behaviour always in context and as an expression of something that is beyond our

individual control. As Michel Foucault says 'people know what we do; they frequently know why they do it; but what they don't know is what what they do, does'! We can't know the consequences, and so take care!

Her need to be true to her 'true' self and exhaustion when pretending otherwise, is raised again. I continue to offer an alternative view which I hope she might get interested in – that identity is not an absolute kind of truth, and because it is dependent on relations with others and local contexts, is not subject to complete control, but can be influenced. I'm hoping she might start to entertain the possibility of a 'looser' and more dynamic version of self, giving herself space to explore other more varied and positive stories about identity.

Week 5 - an entry about personality, success, and environmental influences

I am aware of 'successful' leaders who do not meet my criteria in terms of personality type. They are aggressive, power and status-driven, and may demonstrate even worse facets of their character. So:

§ is my expectation of leadership misjudged – am I the rebel? OR

§ as they all work within similar organisations, does the organisational style, to which they are so well adapted, run at odds with my character OR

§ do they work for organisations 'at risk' in terms of organisational health?

Comment added by Keith Kinsella

...Some one like Malcolm Gladwell in The Turning Point mounts convincing evidence of our tendency to look for the 'attributional' rather than the 'contextual' explanation for behaviour - that's what we're trained to do. But so often it's the context we should 'blame' and the context we should alter to trigger different behaviours.

I think the answers to your three questions could well be yes, yes, yes! Much behaviour is controlled through the operation of social norms which are established by expert knowledge 'disciplines' which have the effect of pressuring people to behave in certain ways if they are to be judged as 'successful', often without their conscious knowledge...Some people find this easier to kowtow to, despite the risk to their 'health'; others don't and want to 'rebel'.

This is good but you need to 'box clever' because you're not fighting particular individuals, you're fighting a much more dispersed 'disciplinary power' (Foucault again!) which is hard to get your hands on.

I continue here to support and affirm her feelings of confusion and frustration but offer her another more systemic perspective explanation to the questions she poses. While encouraging her to be critical ('rebel') I'm trying to get her to look beyond 'individual' explanations to include those that attend to context and 'power-knowledge', and offer again Foucault's ideas and the more accessible writing of Gladwell.

Week 6 - an entry describing pleasant and 'difficult' situations

...The difficult interpersonal interaction occurred when I was participating in a meeting that was considered to be failing in meeting its targets. There was a false and polite tension initially over coffee and biscuits, but when the meeting started there was a sense of domination, reinforced by the seating arrangements that involved the two

organisations facing each other across a large table-even though people could have sat anywhere. The powerful and damning statements from the Chief Executive of my organisation immediately set the tone for the meeting, which felt **unpleasant and humiliating** for the other organisation, as I could empathise with the other team...

Comment added by Keith Kinsella

As indicated in these examples, harmony in relations seems very important to you whatever the substantive issues might be - and particularly in conflict situations where the social dynamics can make things very unpleasant and blocking of any solutions unless care is taken.

What could you have done to have made the first situation more unpleasant and the second less so...what is it about situations and processes that leads to good feelings or hostility?

Here again I see her discomfort with power and conflict situations and desire for more harmony and empathy in relations with others. I seek to push her into a more active stance – what could you have done? – and, continuing the previous commentary, invite her to think about this issue in more ‘contextual’ terms

Week 6 - a response to her FIRO B scores

... In terms of the difficult interaction, my medium expressed control meant that I really wanted to intervene during some of the harsher moments of the meeting but, as the saying goes, realised that this would not be a good career move. However, **as this was against my values I felt very uncomfortable**. In addition, my medium score for wanted affection made me empathise with the CEO of the ‘challenged’ organisation. I could **feel his humiliation**, and again my lack of ability to intervene made me **feel powerless and uncomfortable**. I was not proud of myself at all...

Comment added by Keith Kinsella

You do seem to be very sensitive to the emotion you're calling 'humiliation' and it does seem to raise strong emotions in you whenever you 'see' it.

Social constructionism (a philosophy we'll come to later) proposes that emotions don't exist as real entities within people that we 'trip over' as such, but are rather constructed in language with others. So when we feel or see others feel 'humiliation' it's something we have learned to describe in this way....but could describe in other ways particularly if we could persuade others to agree with us.

I wonder whether you might explore this notion further so it doesn't have such a strong, immediate, and standard impact on you, thus reducing your access to thinking and skills you possess when you're not experiencing situations this way e.g. 'my lack of ability to intervene made me feel powerless and uncomfortable'?

Her discomfort with power is again evident here, and her sense of feeling deskilled and powerless in these situations. I persist with the idea that the meaning of an event is not cast in stone and can be influenced in how we use language, to ourselves and others, and challenge her gently to try reframing her experiences and interest others in these reframes

Week 7 - a response to using Belbin to understand dynamics of her team

...We are lacking in the Resource/Investigator, Co-ordinator and Shaper roles, and, as previously discussed, I realise that I naturally take on these roles in the group. This will explain a lot about why I feel so tired, exhausted, frustrated and even 'put-upon' at times, as I am **prepared to take the blame** for issues that are not actually of my making, on the basis that nobody else will!

To me this is an issue... **martyrdom or immaturity?** The former is an unseen team situation that I do not relish but regularly find myself in-somebody has to take the blame and if nobody else will.....in the latter situation, for me **to be considered immature** is a label that I would **cringe from**, as it was considered a weakness in my family....

Comment added by Keith Kinsella

...Do you have any ideas why you feel it incumbent upon yourself to 'take the blame because nobody else will'? What is it about the situation and your own patterns of behaving that leads to this seemingly inevitable outcome? Do you like being put upon and frustrated, and experiencing martyrdom.....are there some real 'gains' that I can't see that keep you coming back for more? And to take a different tack, are you ever able to duck/escape/trick yourself out of these inevitable situations, when you defeat your predominant story about 'Colleen'? Maybe it's possible for you to find an alternative story that you'd prefer to follow and that others would support?

Again **you offer yourself rather stark and dramatic choices** - martyr or immature? Not a very enticing choice is it? I'm sure you can think of others given enough time and persistence!

As her self-critical tone continues I begin to adopt a more provocative line e.g. 'do you like being put upon?' and 'are there some real gains for you in coming back for more?' I also make use of the 'externalise the problem' technique of Michael White's narrative therapy approach – 'are you ever able to escape these situations?' encouraging her to look for another storyline that better fits with her values. I notice and remark again about her habit of framing her options as stark choices.

Week 7 - a personal 'dear diary' entry

I am definitely having a mid-term crisis! **I am torn between** the sort of leader that I want to be: passionate and capable, **respected and authentic**, and the sort of person who 'achieves' in my workplace, that is, **passive with seniors but aggressive with peers**, lacking in loyalty and very often in ability!

...During this term I have undertaken the set reading but also found that I wanted to **stray into other areas** which built on the reading and work undertaken on-line and in activity...

...One way for me to break the cycle is to **consider self-employment** as a consultant, and so it is key that I find what motivates me. However, because of my practical situation it also has to financially reward me. That is the **ultimate dilemma**.

Comment added by Keith Kinsella

Again those stark alternatives...although this time at least one of them is positive! Keep trying to break these simple either/or's up a bit more so there are more angles to look at. Phase 2 will help you do this I'm sure....and there's really no need to feel you have to go the 'passive with seniors but aggressive with peers' route to be effective and successful, even in [REDACTED].

Let me know if you want to 'stray' into other areas....this is your very own MA programme remember so do regard the set texts as just a guide - it's up to you to find your own path and I'd be very happy to help you with this.

Certainly consider self employment as one possible option. There are quite a few people at CLS, especially among the affiliates, who have done this or are doing this - so you could have some useful dialogues with them at some stage - happy to provide names if you want. In the meantime find a way of containing your anxiety around this 'ultimate dilemma' so your unconscious has time to work on the key questions you want answers to.

The tendency for Colleen to see issues in black and white terms continues – ‘stark alternatives’ - and I again urge her to try and get beyond simple polarities. I also encourage her to ‘stray’ into areas that have more interest for her, and offer support for her to look at self employment as one means of escaping the situation. I also imply that she can also rely on her less-than-conscious or tacit resources to help her with this central question.

Extract from her final learning log entry of Phase 1:

Can I just say how **really helpful** I have found your comments/responses to my learning log over the past term. When I said that I wanted to be **constructively challenged** by you in the 'hopes' section at the beginning of the term, I meant just this type of interaction!

Your comments reflect much of the feedback that I received in a Change and Facilitation Leadership Course that I self-funded for 18 months...facilitated by a group psychotherapist who also specialises in Leadership issues, and the group was made up of a variety of people...some of whom were psychotherapists themselves interested in group dynamics, others like myself, who were studying their own self-development...

So although I have reached what I would consider a high level of self-awareness, I still **need the practice to develop and integrate this into a working model which I do not find damaging** at times. I receive a lot of excellent feedback from my mentees, to whom I am able to explain the theory that I have learnt and internalised. I really want to be able to **put this into practice!!!!**

And yes...I am interested in Foucault's work....and other writers. One thing that I am finding about this course is my love of academia...so the MA 'work' is so enjoyable that I would rather spend more time on it than my paid work!..I am sure that my phase 1 essay will help me **to contextualise a lot of this**, and hopefully will develop my practice in preparation for a new term!

I was very pleased to receive this self initiated ‘dear diary’ entry at the end of the phase: she had experienced my responsiveness as constructively challenging; it seems to be

have been in line with earlier feedback she'd received in the more intense face to face interaction of a group psychotherapy programme; and she was keen to transform her heightened self awareness into a more authentic form of practice.

* * *

Extracts from Phase 1 Essay

'...I have been greatly enlightened by my Learning Log, and my tutor's responses on several occasions, and the revelation for me is contrast - namely that I either see a positive side to outcomes, or a stark one. I find it challenging to compromise in my personal and professional life, as I appear to be **obsessional** in attempting to achieve the best in both. I am beginning to realise that my behavioural (and attitudinal) resolution must **incorporate 'good enough' and 'compromise'** as factors to embrace...Managing my anxiety whilst still supporting others has been greatly assisted by my Learning Log work...

...**Reframing my unconscious need to martyr myself** may bring about the greatest change in my personal circumstances. I have noticed this tendency, tried to ignore it, but close friends and family comment on it, yet **to see it noted starkly in my tutor's feedback was perhaps the shock that was required** to realise how blatant that **tendency** is in my make-up....

Here at last I get a sign that one of my many interventive responses – 'posing stark choices' – seems to have stimulated a 'primitive reaction'. In contrast to John's case, this brief phrase has taken several mentions over a period of two months to become an explicit idea in her writings. Though it's taken some time to surface, it's not come as a particular surprise to her because this notion has been brought up before by close friends and family. But it seems to have gained some additional purchase by emerging from our educational interactions. Her phrase 'unconscious need to martyr myself' suggests that she's already moved on from the initial 'stark choices' framing to something deeper and formative – so a new language-game may be starting to evolve.

Phase 2 Week 3 Learning Log - responding to a question about Machiavelli

There are some unfortunate similarities between elements of Macchiavelli's text and the current situation, as I experience it, in [REDACTED]. Initially, the phrase stating that 'a prince must have laid firm foundations, otherwise he will of necessity come to grief' appears as a logical, pragmatic argument...

However, it feels that there are 'mercenary armies' afoot, as there is a current fragility in both the leadership of [REDACTED] and the Government itself; and the national process of organisational change is being managed by 'armies' or teams, that are 'disunited, ambitious, without discipline, disloyal'. In turn, this is witnessed by other individuals, or workers, who are **baffled and confused** by this behaviour, which breeds a lack of respect, and cynicism.

The 'leaders' or 'captains' [REDACTED] at this time are either not mindful of their staff (armies) due to their own ambitions, or if they are caring of their troops, they are in an

extremely difficult position, in that they might be ‘executed’, that is, demoted, moved, or dismissed from their role. This is the only way that the other mercenary leaders can survive, in the knowledge that the armies **will not retaliate** because they are frightened for themselves, and are not brave enough to ‘.....**act morally.....in an immoral world**’.

Although I feel that Machiavelli has earned his reputation based on reputation rather than knowledge of his works, this does not prevent me from **feeling guilty** that I am calling ██████, that I passionately believe in, the founding principles of a ‘Macchiavellian state’

Comment added by Keith Kinsella

You paint a convincing 'machivellian' picture of ██████. It certainly sounds like a particular form of hell for most participants... But my experience of ██████ is not all like that. So there must be all kinds of pockets of resistance to this view of life, where the workers/patients have been able to push back the oppressive norm based 'disciplinary power' that Foucault talks about, such to be able to express and live according to other more positive and human codes... How have they been able to create a different quality of life in the margins and spaces that are not penetrated by the prevailing gaze that Foucault talks about? And how could new leaders go about discovering and nurturing these suppressed discourses which offer a different and more positive way forward for the whole?

One way into thinking about this contrasting perspective might be to **read some feminist literature that shows how e.g. womens’ voices have been able to develop a unique sound despite the dominance of the masculine for so long. Two works you might try are: Women's Ways of Knowing by Mary Belenky et al, 1997; and Out of Women's Experience by Regan and Brooks, 1995...**

Maybe this will help you find ways of moving from guilt to a more positive and pragmatic emotion?

Here I continue to work with the ‘alternative story’ metaphor raised in the first phase, but here bring it in at a different angle. So rather than repeating the Foucauldian line on repressive disciplinary regimes, I move here to something that has a more positive tone about it and that I intuit might be more appealing to her – the writing and sound of ‘womens’ voices’. I’d been introduced to Belenky’s work a few months earlier by Jack Whitehead and in this moment felt this would be just the ‘medicine’ that Colleen needed to shift her symptoms from passive guilt to something more positive and pragmatic.

* * *

Every phase there is the opportunity for students and coaches to get together down in Exeter to review progress, address particular issues, and develop the educational relationship. During the workshop held during Phase 2, I had the opportunity to have a three way discussion with Colleen and another student over the lunch break, and what follows are some excerpts from a note I wrote to Jack Whitehead some months later capturing some of the experiences that I thought might be relevant to my evolving working hypothesis about our educational relationship

Excerpts from a note to Jack Whitehead on a face to face discussion held with Colleen in February

1. Regarding value of my feedback and reference to 'womens' voices'

During our discussion last week, while we were questioning the value of my feedback to her in the learning logs, she spontaneously exclaimed '...that material on womens' voices...I've started reading it - how could you have known that that was how I was thinking and exactly what I needed!' (consequent discussion with the other participant prevented further detailed questioning to do with the 'what and how' of this point)

2. Regarding the difference between 'her inquiry' and 'the MA inquiry' & how she could be more self directing in her studies

During a part of our conversation, I was trying to differentiate between something I was calling her own 'personal inquiry' to do with her life and professional role and an associated but different inquiry to do with the formal MA programme. I was suggesting the former could provide a broader 'frame' for the latter, allowing her to be more critically engaged with the materials and freer to bring in her own experiences and other readings. After exploring this point for a while...she suddenly exclaimed: 'Wow - I've just been knocked off my feet! I thought I'd have to respect and keep to the programme stuff and exercises...didn't realise I could be critical and independent like you're suggesting. This is amazing...I can be myself!'

3. Regarding her feeling that she's being 'shielded' from what she needs to do by the solo nature of the e learning process

She felt that one reason why she was enjoying the programme so much was because the solo nature of the learning allowed her to duck the interactional aspects that she wants to alter. And further that my feedback providing additional ideas and materials was reinforcing this 'flight' into interesting areas. And finally that she felt she needed to be provoked/goaded into tackling this side of things through more critical and negative feedback from myself, telling her she's 'paranoid' etc

I responded with some humour (so you want more of what you're already getting in [redacted] i.e. punitive feedback!) and the idea that we can shift the focus of learning log, personal diary, and telephone exchanges from the 'pedagogic frame' to the 'real world frame', and vice versa depending on her needs at any particular time...I asked her to be more explicit about what she wanted to work on as we went along.

These entries identify two other possible strands to the evolving language-game. In addition to the 'stark choices'/'martyr myself' issue – further supported here by her need 'to be provoked/goaded' - there are two more positive reactions to work with: the resource offered by 'womens' voices' – 'exactly what I needed'; and the new found realization that she could be 'critical and independent' in her work on the MA – 'knocked off my feet...this is amazing...I can be myself!' I remember thinking at the time that she and I were beginning to get a handle on her central issue and some ideas as to how she could make progress.

Following this discussion Colleen had continued working on the weekly learning logs and had completed Phase 2 and the formal assignment. She had achieved a high mark

and positive formative feedback on this formally assessed work e.g. ‘...You write very frankly and expressively and seem to be gaining many important insights into the impact of earlier framings and patterns that were having a negative impact on your self regard. Good to see that you are well on the way to reframing these in more positive ways. I would recommend you continue to explore the importance of ‘context’ in your thinking about leadership and pay more attention to the ‘receptive-responsive’ relations as you seek to improve your practice. This will help you develop the greater discriminatory abilities that you have identified as a key goal for yourself...’ She had written a general note of appreciation for my support, and with my PhD research hat now more to the fore, I’d written the following note to her requesting more specific feedback on certain thoughts she had expressed.

Copy of e mail to Colleen in April

Thank you for your note and your thanks. Very pleased you're excited about the response to your essay, though I'm not quite sure what you mean by this. I'd like to improve whatever it is I'm doing with you, and it would be good if you could help me learn more about what works for you, by being a little more specific.

For instance, when we met at the Phase 2 workshop, I remember you being surprised by the material on womens’ voices...‘I’ve started reading it - how could you have known that that was how I was thinking and exactly what I needed?’ And then in your last essay you wrote:

Why did I see leadership for my self as an act, rather than as an art, which I now believe it to be, having been influenced by Grint? An art is a talent, a grace, and I want to lead ‘beautifully’. (Ladkin, 2006). I have been continually thinking, reflecting, and reading whilst I become more excited about what I could become in life, not just in leadership. The organisational change that is taken place in [redacted] currently will be a positive life-changing experience for me, coupled with this MA course. ...It could not have come at a better time, as, whatever the outcome, I see the opportunities and potential for a win-win situation. Belenky’s work (1986) has started me on my emergent ‘living theory’.

I commented in the essay that I was pleased you were able to frame this time of change in such a positive way. I also asked if you could say more about what you meant by an ‘art’ and what the implications might be for you as a learner in pursuing this metaphor? And again in regard to Belenky's work, I wondered what kind of ‘start’ this start on ‘my emergent living theory’ might represent?...I’m wondering what effect your initial engagement with Belenky's ideas is having, why it was just what you needed, and how it has got you started on your own living theory?

During Phase 2, as one response to her earlier ‘stray into other areas’ request, I had introduced Colleen to Jack Whitehead’s concept of ‘living theory’, as a frame she could adopt and adapt to provide boundaries and shape for her own development work. In this note I was asking her to provide more specific feedback if she could, on the effect of my invitation to read Belenky (our discussion during Phase 2 had been interrupted at the time), and without mentioned the idea of ‘living theory’ again, what influence it was having on her thinking about development.

Phase 3 'Dear Diary entry' - Emergent Living Theory - April

A key part of the personal, in addition to professional work that I have been undertaking, relates to the development of my own living theory which has been expedited by the work of Belenky (1986) but also relates to areas identified by other writers e.g Grint (2000).

██████████ is going through a period of such massive national and local organisational change, that is taking place very much in the public and political arena, that the response from staff at all levels is such that I believe, and am encouraging, individuals to **develop their own vision and belief system**, or they will be dragged, consciously or unconsciously, into a trough of despair. It is at times such as these that I believe that the 'art' of leadership comes to the fore. **The 'art' being the ability to unearth the talents, innate and learned, that have been developing within that individual**... What I have witnessed in my organisation, is that there are many leaders who are in highly influential leadership roles, who are not managing the change process well, and whose negativity is influencing their teams, and others in the organisation...could it be that in their case their leadership is more of an 'act' than an 'art'?

Reframing leadership as an art brings home to me that it can be honed, developed and ultimately will bring a mixture of pleasures as well as frustration...I keep reflecting back to the targets that I gave myself in Phase 1:

1. To address my understanding of, and the parts that I play, in the power games that are part of organisational life, and leadership in particular.
2. The need for me to expand my portfolio of behaviours, and to reframe the feedback from my emotional responses to situations in constructive ways
3. To be discriminating about my performance, and to encourage my belief of 'good enough' work as opposed to perfectionism.

My 'emergent living theory' is being influenced by Stephen Covey, John Adair, Grint, Bob Garrett and Charles Handy' works. **Belenky is one of the few writers on this subject who has written what feels partly as a reflection of my life story. How could my tutor pick this up? Because there is an understanding and acknowledgement from him of the needs that I have identified at the beginning of the course, and an intuitive grasp of key issues that have arisen in my Learning Log and assignments, where I have been open and honest about my self-beliefs, and have been prepared to be challenged on these. I sense that my tutor and myself are both on an educational and personal journey, albeit he is further along the road. I feel that it is synchronicity that our paths have crossed in this academic fashion at this time.**

This final excerpt from her writings shows that she has become much more aware of her development issues, to do with power and her tendency to martyr herself; and identified what she needs to address them by e.g. moving from being 'obsessional' and 'perfectionist' to being satisfied with 'good enough'. In the concept of 'living theory' she seems to have found an enlivening frame for her work and found great comfort and renewed courage from the Belenky writings. As I implied at the start of this case, I felt that she and I had set off a number of hares during these early phases of the programme e.g. the perils of 'stark choices', exploiting the MA as a vehicle for living life more confidently, the resources and sense of coming home offered by the 'women's voices' writing, and the excitement of being able to develop her own 'living theory' of leadership. By Phase 4 these various strands were beginning to gell into a language-game about self-identity and development which seemed to generate much greater levels of energy and confidence which she could use in the difficult months ahead.

After each phase the MA Administrator sends out an online evaluation form out to each student to find out how they are experiencing important elements of the programme. The response to these has always been patchy but here are excerpts from two evaluations that Colleen completed after Phases 3 and then 4 soon after the interactions I've just been reviewing. In these you'll notice that she continues to be positive and appreciative of the tailored and challenging help she has been receiving from the coaching.

Subject: Phase 3 Evaluation - Colleen

A fuller version of the two assessments is in Appendix 3. Here I show just a couple of excerpts which I believe add further support to the notion that our educational relationship is enabling Colleen to find insights, develop new frames, and cope with the pressures of both her work and her studies.

2. How well does written assignment/associated feedback contribute to learning? 4

I have handed in my assignment, and I know from previous experience that the feedback that I get from my tutor will be valuable, challenging, and add to my learning...Whatever my outcome - I know that the feedback will also be the learning!

3. How well does mix of web based guided learning and private study work for you? 3

...But I find the whole web-based leaning experience extremely valuable. I have the time to reflect, and experience, rather than having to take frantic notes as in a lecture. I am alone so the private study suits me fine! The assignments are valuable. I have learnt how lucky I am to have an excellent tutor, who challenges me, provides excellent feedback, and is extremely supportive. I do not feel that this is everybody's experience, as some of the feedback/support received is minimal

6. How well does the tutor support work and does it meet your needs? 5

Excellent - I couldn't have a better tutor than Keith: he seems to know exactly what I need!

Subject: Phase 4 Evaluation - Colleen

1. How do you rate Web based materials/facilities like Learning Log/Forums? 3

The tutors have tried so hard but am I alone in thinking that we haven't 'cracked' the Discussion Forum yet??? I feel responsible...we have talked so much about this in sessions but then go back to previous behaviours...a change model in action! I feel disappointed (would have put 1 on this) but the Learning Log brought it up to 3. If the Learning Log was marked alone I would make it 5. My tutor is so challenging, so wise and gives me so much material to work on that I feel continually supported and blessed that I was lucky enough to be assigned to him!!

2. How well does written assignment/associated feedback contribute to learning? 4

See above. Challenging material and challenging responses. Sometimes, I feel that the assignment is too easy, but the response from my tutor to my work becomes the real assignment!

3. *How well does mix of web based guided learning and private study work for you?* **4**
See above. **But I think that it is my tutor that is the fulcrum.** Not all feel the same as me. Changes...similar access as I have to high-quality tutors!

6. *How well does tutor support work and does it meet your needs?* **5**
11 out of 5!!

8. *How highly would you rate the curriculum in terms of its relevance to your needs* **5**
I am living this curriculum!!!!

9. *To what extent have your Learning Outcomes been achieved?* **4**
Very helpful, particularly as my tutor has an intuitive response to directing me to papers/issues that will challenge me further!!

These more general evaluative comments from Colleen, asked for by and directed to the academic director of the MA, indicate that she is finding the educational relationship we developed during the early part of the programme to be challenging and supportive, nudging her into the learning territory she wants to inhabit, and helping her deal with the dilemmas she experiences at work. For some reason I did not see these assessments at the time they were sent in, but now looked at from afar, they suggest that my receptiveness and responsiveness to her situation and the intensity – both challenging and supportive - of my feedback, has helped create a very fruitful educational space.

At the end of what might seem quite a long winded exposition of textual material, I should point out that these excerpts represent a very small proportion of work done online in this fashion. What you've seen here amounts to some 4000 words whereas the learning logs and responses can be as much as 80,000 words – in Colleen's case the total was 56,000. These writings are reviewed and responded to but are ungraded and thus represent a very significant proportion of the educational exchange: the seven graded essays are up to 5000 words each and the final dissertation a maximum of 20,000 words.

APPENDIX 3 – excerpt from Ian’s Phase 1 essay

Ian – learning to use ‘context’ as a tool of leadership

...

The importance of context in leadership has provided me another key insight into leadership. Differing situations demand different approaches. I do change my leadership style, aiming to be inclusive and to form a collaborative atmosphere. However, I have a tendency to take over in a critical situation. I thrive on being part of the solution and getting the issue resolved.

This approach has served me well in the past enabling me to gain a reputation as someone who leads from the front and gets the job done. I am able to put forward solutions and get the team behind the idea and guide them to a successful resolution. However, because I am in the situation, I am not above the day to day tensions; it means that I can make emotional decisions instead of more fact based assessments that are possible when viewing a situation in a detached manner. Also, now I am in a higher position I can alienate managers by taking over the situation. They need calm guidance and support while they solve the issue. yes, as you rise up the hierarchy the style that was effective lower down can become a barrier

In gaining the insight that leadership is not a one size fits all I have also gained an understanding that to lead in these different contexts I have to understand ‘when’ they are changing. what have you learned about noticing these transitions? It is very possible that the changes I am making are not appropriate. MBTI (ISTJ) shows I learn from experience, when a new situation or context presents itself I can over react, and jump in whereas a more suitable course of action may be waiting for a solution to emerge. The Snowden and Boone article would suggest this less directive kind of action e.g. ask questions, when you’re in what might be ‘complex’ or ‘chaotic’ contexts

...

Snowden and Boon (2007) have provided a frame work in order for leaders to recognise the differing situations they can find themselves in. They put forward that following such a frame work will allow leaders to make better decisions and responses by understanding the context they are working in. In section 2 I reflect that I can get frustrated with the pace of action and also I have a tendency to take over. Therefore, I believe that a greater understanding of the context of a situation will improve my actions as a leader. A summary of the frame work which I will be following is presented in Table 1. This will aid me in changing my behaviour to match the situation I am in and act appropriately depending on the context of the situation. how do you think you’re going to learn to be more sensitive to this ‘contextual’ data, not just to ‘reading’ it but also ‘constituting’ it as Grint proposes?

In these brief excerpts from Ian’s essay we see clearly laid out some important practical insights into his tendencies and practices – overreacting, jumping in, taking over, alienating – because he ‘wants to be part of the solution and getting the issue resolved’. We also see that he’s not only realized that ‘context’ may be an important factor in leadership effectiveness, he’s beginning also to appreciate that in some contexts e.g. those that could be termed ‘complicated’, ‘complex’ or ‘chaotic’ by Snowden and Boone, his preferred ‘first over the top’ approach might be completely counter productive.

Although this text shows that he is working with the 'primitive reaction' that the affirmation of 'context' and follow up article has provided, he's still talking/writing about this in a straightforward, 'linear' and tool-applying manner: as though embodying this insight would be a simple matter, and not involve much deep change on his part. He's also not yet grasped the significance of Grint's more radical 'constitutive' approach where context is regarded as something leaders can 'create' and not just 'read'. Nevertheless, I sense that he's already started the 'indwelling' work that will alter this, and given his strong need for results, something he will push on with in the next few phases, leading to the development of a more fully resourced language-game which allows him to engage colleagues and staff in more varied and fruitful ways. We will learn more about how this happens in Chapter 6.

APPENDICES TO CHAPTER 6

APPENDIX 1A

WHAT IS 'DEVELOPMENT'?

To this point in the thesis, I've been looking at influence and changes that can be noticed in the short term, like John's decision to try an 'ask for more and better' approach with his more technically minded staff. I think of these kinds of change in terms of *learning and adaptation* within specific situations and have in this thesis following Wittgenstein, characterised them as 'primitive reactions' leading to the extension or initiation of new 'language-games'. Language-games can of course continue growing/altering over longer periods but as I extend the period of observation to months/years I prefer to think of the change process now more in *developmental* terms i.e. progressive change in the process of learning/adaptation. This can mean a number of things but I prefer to frame it in this educational context as 'progressive change leading to higher levels of differentiation and organisation. Here the connotation is one of positive progress, increases in effectiveness of function, maturity, sophistication, richness and complexity' (Reber, 1995). In this educational context I also prefer to use the term 'developmental perspective' (Tompkins and Lawley, 2003), to show that what I'm looking at is not development 'out there' so to speak, but a world view, a way of punctuating experience as an observer, to help make sense of changes in what students learn and do.

Developmental models based on such notions of 'higher levels of differentiation and organisation' typically involve a sequence of changes occurring over a relatively long period of time. For 'self-organising' models, this sequence involves going through a number of 'developmental stages' which according to Reber (1995) have at least four characteristics: it should be possible to see recognisable qualitative differences in behaviour over time; the behaviours in each stage need to show structural coherence; the rate of sequencing may be accelerated/retarded but the order of stages must remain the same; and the sequence must show hierarchical integration with higher/later stages which incorporate and expand on earlier stages. Exemplars of this kind of developmental model include Gesell's for sensory motor development, Piaget's for cognitive development, and Kohlberg's for the development of morality; and somewhat more loosely, Freud's theory of psycho-sexual development, and Erickson's stages of man. You will see later in this chapter that I also regard Torbert et al's Leadership Development Framework based on the adult development work of Jane Loevinger as working in a very similar way (Torbert, and Associates, 2004)

A good introductory example of this view of development is provided by the model created by Dreyfus and Dreyfus (1986) while studying the work of e.g. nurses and chess players. They looked at and identified five stages that people seem to pass through when moving from the 'novice' to the 'expert' level in a particular discipline (viz. novice, beginner, competent, proficient, expert) with each successive stage requiring more sophisticated, intuitive, and skilled performance. What this model and others like it give, is a clearer idea of what progress might look like as you become more experienced and skilled, and so some guidelines as to what you might do to move up the capability ladder. So in the example provided in the appendix using 'facilitation' as the area in focus, while someone at the 'novice' stage would be able to 'apply context free rules' a person at the 'expert' level would also be able to 'create context sensitive rules and

break them in the light of emergent outcomes'. While this clearly is useful, an important shortcoming of such models is that they promise more than they can deliver, offering a clarity that is seldom there in practice: whereas the models seem to offer apparently distinct stages within them, they would be more realistic in showing these as fuzzy, systemic, and multi-dimensional in nature. There is also a lack of research into the process of *moving between* identified stages which after all is what development is primarily about (but see the important associated question about whether development activity should be focused on either a 'horizontal' [within a stage] or 'vertical' [between stages] dimension, later on in this chapter when I look at the 'how' of development.) So these models are usually best used as ways of assessing/evaluating progress - something that I'll turn to in the next section - rather than as providing ideas for and inspiring development.

Ken Wilber in his *A Brief History of Everything* (1996) goes to great lengths to remedy the former quite widespread misunderstanding by emphasising the fluidity and subtlety of the best models of this kind. For example, while there are general stages of development, each individual has to negotiate their own unique path through those stages. Further there are multiple 'streams' that operate simultaneously (like Gardner's eight 'intelligences' [?]), and people can be at different stages in each e.g. spiritually developed but an emotional mess. Peak experiences can lead to temporary leaps forward that cannot be maintained for more than a short time, but that serve to act as beacons for future development. Each level not only 'transcends' all prior levels but 'includes' them; and needs to include them, as without these still existing, the new level would collapse. Hence the likelihood of pathology if a level is not properly navigated.

He also posits that the threshold between two adjacent levels has a '1-2-3' structure. In step 1 the self 'identifies' with the lower level; in step 2 it begins to move beyond that lower level and to differentiate or transcend it; in step 3 the self identifies with the new higher level and centres itself there, including and integrating the lower levels on which it is based. At each rung of the developmental unfolding there is a different view of the world and a new sense of self-identity. Finally in all such stage-based holographic models, nobody is ever simply 'at' a stage but will have a centre of gravity at one with a distribution across two/three adjacent stages. And like life, there are sometimes peak experiences leading to temporary leaps forward, followed by regressions, as the thinking patterns and behavioural skills required to 'carry' or accommodate the extra breadth/depth of higher stages, need to be developed and embodied. As the reader will see later in the section on Ian's longer term development, there are important differences between what Torbert et al refer to as 'horizontal' and 'vertical' development, and the strategies coaches can use to support either/both of these. (I acknowledge making extensive use of the work of Tompkins and Lawley (2003) in these last five paragraphs).

Another hierarchical theory of this kind is that developed by Elliott Jacques which became known as the *time span of discretion* model (Jacques & Clement, *Executive Leadership*, 1994). His model was based on what he regarded as the cognitive complexity of work with the primary variable being the requisite 'time horizon' demanded by the work in a particular job before the outcomes of decisions would become evident e.g. one week for a first line supervisor but three years for a chief executive, and 20 years for a world leader. As a mirror image of this job oriented model he also developed a person oriented model which assessed the potential individuals might have to reach these different levels of time discretion. His work has not been widely recognised in the academic world but has been influential in the consulting

profession and in commercial systems of job evaluation. I had an experience of how his model is being used in industry when doing some work with a major financial institution who were using consultants applying the Jacques model. Following rapid international expansion, the organisation had found a dearth of talent to fill a range of new chief executive level posts, and were devising a development programme for promising senior managers who were aspiring to these roles. The consultants had identified Jacques 'level 4' as the key transition point for such people, This level required moving from 'operational control of existing businesses' to the 'creation of new strategic opportunities' and learning what would be involved in developing and running such new businesses. The difficulty the organisation was facing was given an assessment of 'potential' how could they go about developing this more strategic 'capability' and then actual 'performance' at this new level, both rather different things to assessing potential. As mentioned earlier, this is not something that these hierarchical models deal with in any detail, and my own proposed experimental and emergent approach to support such development did not fit well with the existing rather structured and risk-avoidance approach (they are in insurance!).

While these two frameworks keep quite strictly to the nested hierarchical type of model, there are others which use the idea of different 'levels' or types of activity without necessarily adopting the nested version. One worth mentioning in this context is the influential work done by Argyris and Schon on *levels of learning* often referred to as 'single and double loop learning', and the various tools they've developed to explore these ideas (Argyris & Schon, ?). My own view is that double loop learning and the associated practice of re-framing, as well as Schon's differentiation between problem *solving* and problem *framing* (Schon, 1983) bear a strong family resemblance to how I've been using Wittgenstein's concept of language-game in the context of 'knowing how to go on', Being able to learn both by 'reflecting-on-action' after the fact, and 'reflecting-in-action' in the heat of the moment (ibid, ?) to me represent a higher level of development in terms of reflexivity if nothing else, and worth striving for in the leadership as well as other arenas. So while this perspective on what might constitute 'development', doesn't align easily with the nested models, it's clear to me that being able to reframe one's experience/situation, especially in the moment, and so be afforded the possibility of exploring other options, as well take more timely action (Torbert, ?), does represent a 'higher' level of capability and an example of genuine development. Whether this leads to a quality or level of development beyond that which I've talked about within the shorter term frames of 'primitive reaction' and 'language-game' is what I'm curious about now: might this lead to development beyond changes in perception, thinking and behaviour, to more significant changes in terms of mindsets, values and identity which normally take much longer to come about?

A final group of ideas that I believe can speak to the kind of development that is relevant to improving leadership work, don't really fit into this idea of 'levels', nested or otherwise, and I think of them as being primarily *systemic* in nature. Here I'm thinking about my own inquiries into a range of ideas over the years that have definitely influenced and deepened my own development. In particular I'm thinking of the impact that e.g. 'systemic thinking' which I started studying in the early 90's, has had on how I understand things and see myself in situations (Campbell & Draper, ?) , And similarly but more recently the new perspectives that 'practice theory' now offers me (Schatzki et al, 2001) , which help in how e.g. I look at this very inquiry into online coaching. Moving beyond these mainly cognitive approaches, can be added a range of 'body-mind' approaches like 'Inner Game' (, ?) and 'Feldenkrais' (Feldenkrais, ?) which have again offered insights, provided me with useful tools, and inspired values which allow

me to access a much wider range of information and criteria and so reach more rounded judgements. And of course I can't leave this very brief scan of this topic without mentioned the very powerful development effect that e.g. my experience and use of ideas such as 'tacit knowledge' (Polanyi, ?), 'power relations' (Foucault, ?), 'living theory' (Whitehead, ?), and 'natural inclusion' (Rayner, ?) have and continue to have on me. Gaining an understanding and a facility in using the concepts, tools, values, and different mindsets that these provide, would all count as relevant and important development activity in my eyes. They all offer new ways of looking at and making sense of experience and relatedness, and increase the richness and depth of perspective that can be brought to bear on both problem framing and problem solving activity, and contribute towards the development of 'artifacts' (Ilyenkov, 1977) which extend and nuance my being in the world.

While a fuller exploration of these ideas and how they contribute towards a deeper understanding of 'development' is beyond the scope of this inquiry, I will come back to them in my review of epistemology and pedagogy in the next and final chapter

So far I've been exploring some of the theories/models that I've found of use in shaping my own development over the years. And what this has done for me is to alert me to the wide range of phenomena that I should be aware of when looking at the progress of my students over time. But as Lin Norton says in her book on pedagogical research in universities (Norton, 2009), though these models may be interesting, unless we can find ways of assessing/measuring achievement within them and translating these into pedagogical methods, they don't take educators much further. So what I want to turn to next are ways of assessing progress against some of these kinds of indicators of development which I could apply to my own students work in an informal 'as we go along' basis ideally, so that this could influence my everyday work with them.

APPENDIX 1B

HOW CAN ONE ASSESS DEVELOPMENT?

As a starting point for this review, I look at my own experience and changes over time, to examine what kind of development I've been seeking in order to improve my own practice, and how I've been assessing this, at least tacitly if not explicitly. Here the 'narrative of my learning' offered in Chapter 1, will have given readers a good idea of the *range* of areas that I've explored with development in mind to do with 'facilitative processes' e.g. Mindell's 'process work' approach, and 'embodiment' and 'body-mind integration' e.g. the Feldenkrais method, in addition to the usual more cognitive areas. I think this narrative will also have allowed readers to form a view of the different *levels* of development I've been aspiring to. However it must be equally clear, especially looking at the types of development labelled 'systemic' I've just referred to in the last few paragraphs of the previous section, that there are real difficulties in applying these ideas in any sort of standardised manner.

While there are many possible ways of researching and analysing qualitative data in order to assess the nature and level of such development, I need to focus on those that relate most appropriately to the nature of my data which is constituted primarily by the regular text-based reflective writings contained in logs, essays, and dissertations; and the focus of my inquiry – how students' sense of self, patterns of thinking/feeling, and situated behaviour with others, is or is not being influenced and changed within our educational relationship. From this narrower perspective, there are two main ways I

like to have in mind when I look at student materials: the first influenced by *phenomenography* (Marton & Booth, 1997) focuses more on the nested hierarchical form of development models that we've already looked at in the previous section, and that allows students and myself to categorise ourselves within a progressive hierarchy of sorts and use this information to influence the kind of support I offer them; the second is far less structured and, influenced by the *narrative inquiry* approach (Clandinin, ?) allows for much more diverse and individualised readings of development and supportive activity. I will now explore each of these approaches in order to condition the 'artifact' I use for assessing 'development progress' (Ilyenkov, 1977) that I will be using in the next section.

Nested hierarchical models: in thinking about studying a situated practice like leadership in an institution of higher education, a key question is whether 'performance' i.e. getting good results, is all we want to measure? Education ideally seeks to improve learners' ability to think—to create novel approaches, ideas, and solutions—and not simply to perform well, and so we should be measuring the former as well. Ramsden wrote that learning is reflected not necessarily in a change in behavior, but rather in a change in how people "understand, or experience, or conceptualize the world around them" (2003, p. 4), and I would say this is true for development as well. Measuring this sort of change, more subtle and potentially more complex than the changes in performance captured by summative models, requires an educational evaluation model that also reveals how learners think and measures changes in their thinking over time – and here I'm thinking about *embodied* thinking and situated action.

Learners who experience a situation in different ways may have different outcomes, and it is these differences in ways of experiencing situations, or ways of 'discerning something from, and relating it to, a context' (Marton & Booth, 1997, p. 112) that *phenomenography* seeks to understand. This differs from other uses of the word 'experience': for instance from Dewey's (1938) broader notion of experience as the juncture of past and present encounters, or from the more immediate, prereflective awareness described by Merleau-Ponty (1968). Because it assumes an inextricable relationship between the individual's learning and the learning context, *phenomenography* resembles social constructivist approaches (Vygotsky, 1978). It is also unique among qualitative methods in two further respects: rather than searching for common themes among participants suggestive of shared experience of a phenomenon, as is the case with phenomenology (van Manen, 1990), *phenomenography* looks for the ways in which learners vary in the manner in which they experience, perceive, apprehend, understand, and conceive of the same phenomenon (Marton, 1989); further, rather than viewing the phenomenon itself as the subject of study, as phenomenology does (van Manen, 1990), *phenomenography* takes as its unit of analysis the *range* of ways of conceiving of a phenomenon (Marton, 1981), examining a whole group of people. Finally, Trigwell (2000) provides an overview of how *phenomenography* is distinguished from other research approaches (p77): 'The key aspects... are that it takes a relational (or non-dualist) qualitative, second-order perspective,...aims to describe the key aspects of the variation of the experience of a phenomenon rather than the richness of individual experiences...yields a limited number of internally related, hierarchical categories of description'

In a seminal study in this area, Säljö (1979) described five conceptions of learning held by students in understanding their own learning experiences i.e. increasing knowledge, memorizing, acquiring facts and skills, abstracting meaning, and interpreting information to understand the world. Säljö presented these five conceptions not as

independent of one another but rather as related in hierarchical fashion, so that embedded in a particular understanding (e.g., abstracting meaning) is an awareness and understanding of all those conceptions that might be considered less sophisticated (e.g., acquiring facts and skills, memorizing, and increasing knowledge). Generally, in such studies, people are assumed to move from less to more sophisticated conceptions of a particular phenomenon in hierarchical fashion

Marton and Booth (1997, p 114) argue that the final categories of description and the outcome space they create is a depiction of variation on a collective level, and as such, “individual voices are not heard. Moreover, it is a stripped description in which the structure and essential meaning of the ... [categories] are retained while the specific flavors, the scents, and the colors of the worlds of the individuals have been abandoned”. The categories are thus not necessarily ones that any one person in ‘real life’ would identify with; they are constructions that incorporate key variations of discussions with a specific number of people (Cherry 2005). The results are not known in advance and tested in the study, but must be discovered, or emerge from transcripts, and constructed in an iterative way from the transcripts. In this way, such analysis is a ‘bottom up’, inductive way of working from the data to the results, rather than a ‘top down’ way of constructing then testing an hypothesis (Green 2005).

While Torbert et al (200?) do not mention using the phenomenographic approach in their work, I think their model is very similar to e.g. Saljo’s model, and can provide a practical illustration of how these kinds of models can be used for assessment and for helping people think about what development in their field is, and what might be involved in making progress. Their Leadership Development Framework is an example of the nested hierarchical type of model, and has been developed specifically for the area I’m inquiring into i.e. leadership and leadership development, and is based on well respected adult development research originally pioneered by Loevinger in the 40-50’s (Loevinger and Wessler, 1970) and then carried forward by others such as Susanne Cook-Greuter, a leading scholar in mature adult development(Cook-Greuter, ?) . Its developmental ‘stages’ correspond closely to those identified by other respected figures such as Kegan (1994) and Wilber (2000). What Torbert has done is to position, develop, and use this original work in the field of leadership and leadership development, publishing a number of books to raise interest in this concept. Outline details of his version of the model are presented in Appendix 2. You’ll notice that it is a ‘nested’ model which has some eight ‘levels’ of increasing maturity ranging from ‘impulsive’ to ‘ironist’ where the development variable is concerned primarily with perception and problem solving capability, what Torbert et al call ‘action-logic’. The instrument consists of a range of open questions which you have to respond to in writing, and the assessment focuses on the breadth and complexity of the written responses.

When I undertook a training in using this psychometric instrument in 2001, as a potential aid to my coaching work, I was required to complete the instrument and get feedback from a trained assessor – in this instance it being the co-developer of the approach, Susanne Cook-Greuter. I discovered that I was assessed as being at ‘level 7’ i.e. at the ‘alchemist/magician’ level, which was two levels higher than I was expecting. You can see examples of my responses assessed at this level with others that are judged as showing capability at a lower level, also in Appendix 2. Obviously I was flattered to be positioned in this way as the research suggests only a very small percentage of the population ever reach this level, who can demonstrate ‘genuinely fresh, authentic, unassuming, good humoured, and timely’ qualities as they act to ‘align personal,

organisational, societal and global goods' (Torbert, 2004 , p 177) But I was also sceptical: I could see how my quite complex and possibly sophisticated responses to the questionnaire might have been marked so 'highly' but I certainly didn't then, or do now, rate myself as actually *performing* anywhere near this so called 'alchemist' level. Why? Well, when Torbert talks about Gandhi and mentions other more recent global titans such as Mandela and Havel as operating at this level, I think...enough said! However, the concept of 'nested levels' and the kinds of qualities that constitute these levels, had and has some attractions; and the method of assessing potential levels of attainment through assessing the content and quality of people's writing, seemed worthy of further consideration.

The issue for me here has been whether I could use this kind of approach/model, ideally informally and inductively on an 'as I go along basis', to assess and show how my students' writings, and hence at least their potential capabilities or 'forms of life', are and could be developed during the programme. The analytical method used in the Torbert approach is primarily textual analysis of open ended questionnaires, which could be applied informally in work on learning logs and essays (Torbert, ?) . Formal phenomenographical model building typically involves in-depth interviewing and the analysis of transcripts which again could be included informally via web-based conversations on e.g. Skype. This will be something I return to in the final chapter when I finally look at how I've gone about supporting such processes and look ahead to further developments. I now turn to a second approach to assessing development based on the concept of *narrative*.

Narrative/life story models: the second approach to assessment that I wish to look at, does not rely on text-based analytical and deductive methods to assess 'levels' of achievement against hierarchical models. While still being based on what people write and say, it is instead a much more open and inductive approach which seeks to identify through the kinds of stories people tell about themselves, and the way these stories change over time, the nature of the development they have achieved and are experiencing. Against placing someone in one of say the eight odd categories of a Torbert type model, this approach is much more attuned to the unique and timely aspects of individual development, and so is likely to provide rather more varied and richer images of what has been achieved.

Perhaps surprisingly, narrative inquiry shares with Marxism and critical theory an explicit interest in ontological aspects of change as well as a goal of generating scholarship that transforms the ontological conditions of living. As Clandinin and Rosiek discuss, in contrast to Marxism's focus on macro-social material conditions, narrative inquiry privileges individual lived experience as a source of useful insight. This approach to analysing human experience is grounded in a pragmatic relational ontology and all representations ultimately arise from the immediacy of first-person lived experience. (Clandinin and Rosiek, 2007, pp 49-50). Further these narrative representations framed as an individual's 'living theory' (Whitehead, ?) and therefore a central part of their life story can, as Watts (2008) states, have the potential to be 'an ideal methodology of resistance' to the disciplinary regimes that Foucault has so cogently described. Given my preference for a more practice oriented perspective, I feel that I'm floating somewhere between these two positions,

The idea that such stories about lives might be a useful way to assess development has been looked at in the literature by e.g. Shamir et al (200?) who as a result of their research, posit that 'a biographical and narrative approach to leadership studies should

complement the currently dominant emphasis on leadership styles' which the 'levels' models favour. In what Chamberlayne et al referred to as the 'biographical turn' in the social sciences (Chamberlayne *et al.*, 2000), there are a range of approaches to inquiry into such narratives, emanating from diverse disciplines such as psychology, sociology, medicine, literature and cultural studies. Incorporated within these methods are mechanisms for critical reflection which conceive the individual as the primary sense-making agent in the construction of his/her own identity (Blumer, 1969; Giddens, 1984, 1991; Schwandt, 1998). Reflective writing has also become a feature within the context of professional development literature (Schon, 1999). As there is no one unifying method (Riessman, 1993; Mishler, 1995; Schegloff, 1997; Manning et al, 1998), approaches differ on the core questions of why and how stories are told, and therefore the knowledge claims that can be made about the problem under investigation. For example, in a narrative study of people who are unemployed, Ezzy (Ezzy, 2000) explored the role that broader social forces play in how people tell stories about their job loss. He described two narratives: the heroic and tragic job loss narratives. The heroic narrative gives prominence to the role of a person's individual agency and autonomy, whereas the tragic job loss narrative is one in which the person is a victim of institutional or social forces beyond their control. Reading recent stories about our continuing financial crises, it's clear that these two forms of narrative are still in frequent use!

Thematic analysis is commonly used in sense making of narrative and involves the open coding of data, i.e. the building of a set of themes to describe the phenomenon of interest by putting 'like with like' (Morse and Field, 1995). Narrative analysis differs from thematic analysis in two interconnected ways. Firstly it focuses more directly on the dynamic 'in process' nature of interpretation (Ezzy, 2002) - so, integration of time and context in the construction of meaning is a distinctly narrative characteristic (Simms, 2003). This is something that Ricoeur calls the 'threefold present' (Ricoeur, 1984) in which the past and the future co-exist with the present in the mind of the narrator, through memory in the first case and expectation in the second. Secondly, narrative analysis begins from the stand point of storyteller, how people, events, norms and values, organizations, and past histories and future possibilities, are made sense of and incorporated into the storyteller's interpretations and subsequent actions. Narrative analysis contextualizes the sense-making process by focusing on the person, whereas thematic analysis, in contrast, de-contextualizes the data (e.g. by 'cutting and pasting' themes together) to examine the meta or broader issues. Narrative inquiry shares with discourse analysis both a concern for how broader institutional values and cultural norms are expressed in language, and the belief that language is a form of action (Potter and Wetherell, 1987). It also adds further insights into 'contexts of practice' because it studies the world through the eyes of one storyteller and applies a theory of time.

Often a narrative approach looks closely at the sentences constructed by the storyteller and the information and meaning they portray e.g. following Young (1984) are the sentences *descriptive, consecutive, consequential, evaluative* and/or *transformative*? It also focuses on who is mentioned in the telling of events (and who is absent) and the role they have in the telling of events, as people in the *supporting cast* of a person's narrative (Gergen and Gergen, 1984) Thinking about *context* is another important feature of narrative inquiry as data emerges from within the relation between the teller, the listener and the context of the telling of the story (Frank, 2000). It also takes as a given that people may behave politically through excluding details of events or exaggerating aspects of stories (Ezzy, 2000). On the basis of careful examination of the data, why and how the story is being told, who the supporting cast are, and the nature of

the storytelling occasion, one can determine the narrative's *plot* or organizing theme, which brings coherence to the telling of events and allows us to see and understand how a person makes sense of the world.. Finally, the *point* of the story considers both the organizing theme and the form of the narrative. Form refers to the flow of the narrative over time and common prototypes are stable, progressive and regressive narratives (Gergen and Gergen, 1988). These broad narrative forms are represented in Frye's (Frye, 1957) forms of literary narrative: the tragedy, the comedy, the happy ending, the satire, the romantic saga, etc. It is the inter-relationship of the organizing theme and form that creates what is called 'coherent directionality' in the narrative. This means how it makes sense over time.

A primary weakness of narrative inquiry is that it is retrospective and further requires an in-depth engagement with and understanding of the participant's experience. There can be a blurring of interpretive boundaries between the analyst and the research participant, with the analyst playing too strong an interpretative role without sufficient links back to empirical data; or too weak a role where there is a lack of analytical attention to social context and interaction, celebrating, rather than analyzing, the stories (Atkinson, 1997). Introspective reflexivity is critical in this regard (Finlay, 2003), in which researchers must interrogate the dynamic created between the researcher and 'the researched' and devise accountability mechanisms.

Moving beyond these general considerations of narrative inquiry and looking at what I'm seeking, there are some further comments I can offer. As Riesman comments, before you can get to analysis you need to look at the production of texts for inquiry. As she quotes Nelson (1989), 'the researcher does not *find* narratives but instead participates in their creation' (Riesman, 2008, p 21) often through the process of interviewing. In this instance, this whole process of interviewing and transcription with all the interpretation that this entails is leapfrogged. The material I'm working with presents a special case as with the reflective learning log and essay materials that the MA generates, there is no need for this. The raw texts themselves which already are the product of at least one and more often two-three rounds of reflective analysis by the student, form the basic documents for further analysis and interpretation. This means that the analysis and commentary by the coach/researcher can in this case, avoid the confusion/distortion of the original meaning of student work. So while I don't have access to the 'real thing' – the unmediated and situated experiences that the student is commenting on - I am able to avoid this first hurdle and concentrate on the monitoring of my influence on subsequent interpretation and sense making

So assuming that I treat what students write as narrative, constructed by 'socially situated individuals from a perspective and for an audience' (Riesman, 2007, p 23) – and of course, influenced by various 'circulating discourses' - how might I approach the ongoing analysis of these narratives of learning, change, and development (or 'reflexive biographies'), given my particular interest in their development *during* the programme? What I'm looking for is not the customary approach to formal analysis of narrative as one would carry out when doing formal research using this 'methodology'. Here I'm looking for something that could be used informally on an everyday basis as the coach works his way through learning logs and essays and lets his/her thoughts float above the immediate issues of critical engagement and problem solving, to thoughts of identity and the trajectories of potential longer term development. And by doing this, to enable, using Torbert's telling word, 'timely', immediate conversations about whether and how the student is doing something that will or will not be bringing a desired future state closer into view; in other words whether this desirable position is indeed being

‘presenced’ or to coin another phrase, ‘distanced’, in their languaging of their emerging story?

There are many possible ways of doing this in a research mode but these typically involve a retrospective approach involving interviewing and other ethnographic methods, followed by e.g. thematic analysis. etc, But given my interest in timely interventions I need an inquiry/interventive approach that is more immediate and action oriented in nature. This has no doubt been a crucial factor which has energized my development of the ‘presencing developmental possibilities’ approach to coaching on this programme. Further with my interest in understanding and countering the effects of disciplinary power in facilitating this both in the university relationship and within the employing organizations, I’m drawn to the therapy oriented approach developed by the Australian narrative therapist Michael White who has exercised a considerable influence on the development of this approach (White, 1989). His practice, heavily influenced by the ideas of Foucault, has always struck me as more a case of story ‘changing’ than telling!

In developing his approach he created several interesting concepts/tools to assist the therapist in helping clients loosen the grip of old narratives in order to construct more positive and choiceful ones. One of his better known techniques is known as ‘externalising the problem’ where through a deconstructive process, the ‘loyalty’ to the dominant story the client seems to be living within, is weakened so that other aspects of experience which have been blotted out by the story are made visible. In looking at this less subjugated experience the client can now seek out ‘unique outcomes’ which can form the building blocks of an alternative story. In addition his approach recognizes the social nature of power relations by encouraging the client to look for support for the emerging new story by finding ‘witnesses’ to these new resources they’ve now discovered. A further reason for me being attracted to this approach is how well it fits with a more inclusional view (Rayner, 2011) of coaching: by reducing the energy field that holds the client in thrall to a dominant story, it becomes possible to reveal to the client the resources that are already available to help him/her reconstruct a more positive approach to their life story. So instead of coaching being seen as being about ‘making new connections’ it can instead more naturally be seen as ‘revelatory’.

A cursory look at my interventions in students’ logs reveals many examples of this kind of approach where I question a student’s attachment to a particular story about themselves or something they find ‘natural’ or a ‘habit’. For example in my work with Colleen a lot of my focus was on challenging her about her rather negative self image where I used White influenced language like ‘...Do you have any ideas why you feel it incumbent upon yourself to ‘take the blame because nobody else will’? What is it about the situation and your own patterns of behaving that leads to this seemingly inevitable outcome? Do you like being put upon and frustrated, and experiencing martyrdom.....are there some real ‘gains’ that I can’t see that keep you coming back for more? And to take a different tack, are you ever able to duck/escape/trick yourself out of these inevitable situations, when you defeat your pre-dominant story about ‘Colleen’? Maybe it’s possible for you to find an alternative story that you’d prefer to follow and that others would support? (see Chapter 5, Appendix 2?) There are many other examples where I adopt this provocative position challenging what looks like a less than useful pattern/ or assumption. These have helped me get across the social constructionist proposition that ‘reality’ is not a fixed object out there but something that can be influenced at least in terms of how one experiences it. This is something that is very important for students to

entertain if they are as Barnett has proposed, to engage with a 'supercomplex' world in a worthwhile way.

APPENDIX 2A

TORBERT'S LEADERSHIP DEVELOPMENT FRAMEWORK A BRIEF SUMMARY OF SEVEN LEVELS OF LEADERSHIP

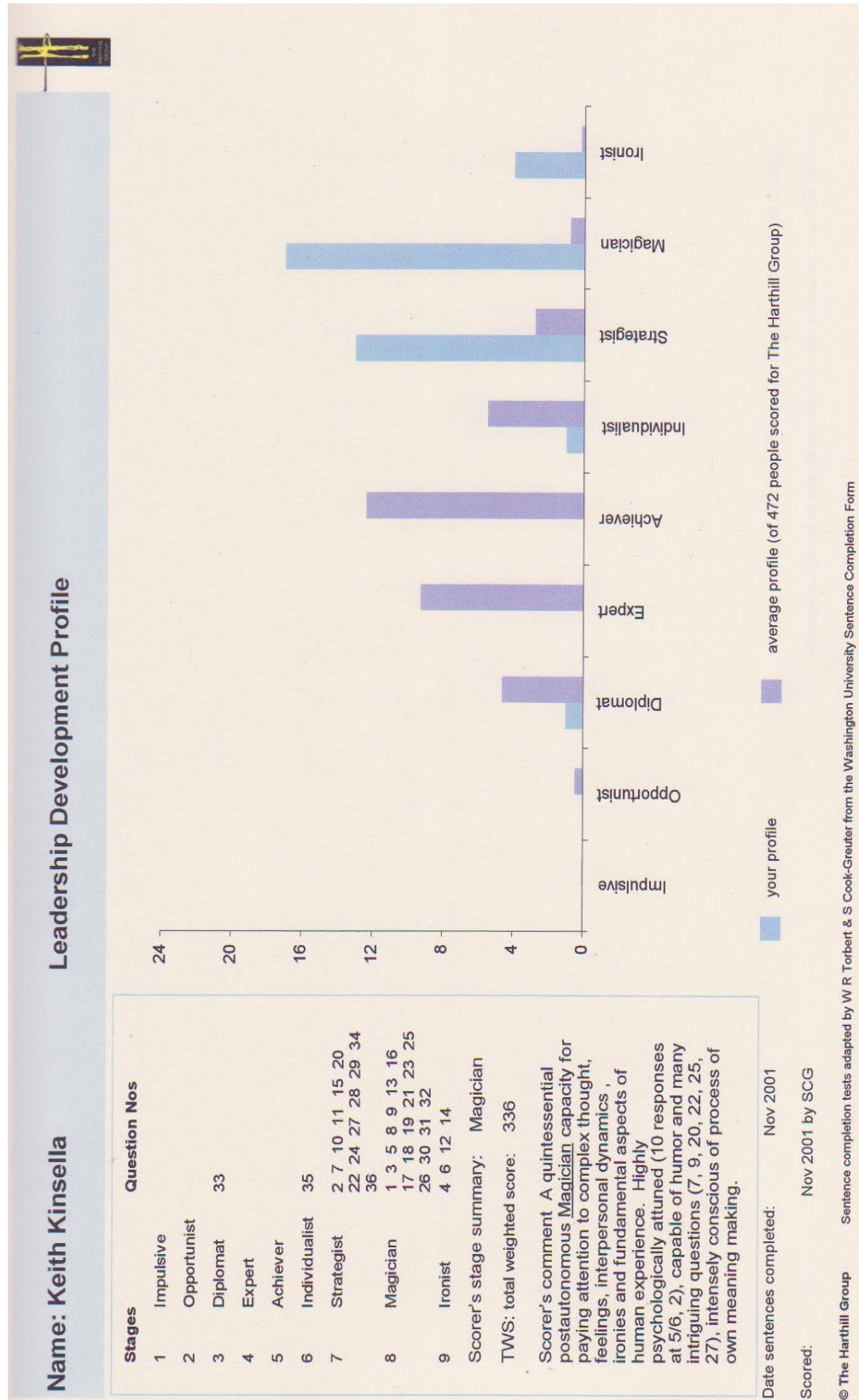
Table 4-2 Managerial Style Characteristics Associated with Seven Developmental Frames

1. **Opportunist** Short time horizon; focus on concrete things; manipulative; deceptive; reject feedback; externalises blame; distrustful; fragile self-control; hostile humour; views luck as central; flouts power, sexuality; stereotypes; views rules as loss of freedom; punishes according to 'eye for an eye' ethic; treats what can get away with as legal; positive ethic = even trade.
2. **Diplomat** Observes protocol; avoids inner and outer conflict; works to group standard; speaks in cliches, platitudes; conforms; feels shame if violates norm; sin = hurting others; punishment = disapproval; seeks membership, status; face-saving essential; loyalty to immediate group, not 'distant' organisation or principles; positive ethic = nice, co-operative.
3. **Expert** Interested in problem-solving; seeks causes; critical of self and others based on craft logic; chooses efficiency over effectiveness; perfectionist; accepts feedback only from 'objective' craft masters; dogmatic; values decisions based on merit; sees contingencies, exceptions; wants to stand out, be unique; positive ethic = sense of obligation to wider, internally consistent moral order.
4. **Achiever** Long-term goals; future is vivid, inspiring; welcomes behavioural feedback; effectiveness and results oriented; feels like initiator, not pawn; appreciates complexity, systems; seeks generalisable reasons for action; seeks mutuality, not hierarchy, in relationships; feels guilt if does not meet own standards; blind to own shadow, to the subjectivity behind objectivity; positive ethic = practical day-to-day improvements based on self-chosen (but not self-created) ethical system.
5. **Individualist** Works independently with a high value on individuality, is freer of obligation and imposed objectives, thus finds new creativity; aware that what one sees depends upon one's world view and experiments with this; may be something of a maverick as they adopt this new world view and find their own way; experiments with using power differently; starts to notice their own shadow (that they may have a negative impact).
6. **Strategist** Creative at conflict resolution; recognises importance of principle, contract, theory, and judgement - not just rules, customs, and exceptions - for making and maintaining good decisions; process oriented as well as goal oriented; aware of paradox and contradiction, unique market niches, particular historical moments; relativistic; enjoys playing a variety of roles; witty, existential humour (as contrasted to prefabricated jokes); aware of dark side, of profundity of evil, and tempted by its power.
7. **Magician** Disintegration of ego-identity, near-death experience; seeks participation in historical/spiritual transformations; creator of mythical events that reframe situations; anchoring in inclusive present, seeing light and dark, order and mess; blends opposites, creating 'positive-sum' games; exercises own attention, researches interplay of intuition, thought, action, and effects on outside world; treats time and events as symbolic, analogical, metaphorical (not merely linear, digital, literal).

With acknowledgements to Fisher, D. Rooke, D and Torbert, W. 2000. Personal and Organisational Transformations Through Action Inquiry. Boston: Edgework Press. p. 44

APPENDIX 2B

LDF PROFILE FOR KEITH KINSELLA, NOVEMBER, 2001



APPENDIX 2C

KK RESPONSES TO THE 36 QUESTIONS IN THE LDF QUESTIONNAIRE

Your initials KK
Date 29/10/01
Office use 467

- 1 *Raising a family*
is a joyful, frustrating, and deeply challenging experience, requiring continual critical self-reflection and adjustment to nurture others and own sense of identity and belonging, as the world around us changes - but I had no idea/or could have, before I decided to have one!
- 2 *When I'm criticised*
I feel less got at than when I was younger - but it depends on whether I regard it as fair; and it takes some time to recognise, accept, and step back outside the immediate situation in order to make 'relational' sense of what this communication means to me and others involved, and how to do something useful with it
- 3 *When a child will not join in group activities*
I sense their isolation, feel the need to tell them of the benefits and encourage them to get involved - but remembering how I often didn't want to join in myself, wonder whether this is just situational or chronic, and what if anything I could do, to do something that 'fits' their need
- 4 *A man's job*
increasingly under challenge and possibly now an anachronism in a postmodern world, still retains a flavour and rich associations that it would be a pity to lose on the path towards more flexible, non-gender based, and situational thinking and feeling about peoples' contributions to work and society
- 5 *Being with other people*
helps me experience the relational/systemic perspective I'm fascinated by, and paradoxically the fact that often I prefer to be on my own/or with one other - my darker emotions surface soon enough if this doesn't happen - so I experience it as a revealing tussle between 'pure' ideas and my actual experience
- 6 *The thing I like about myself is*
my practical dedication to my immediate family which, despite my general disposition to ideas and grand visions, enables me to surprise myself by consistently demonstrating service to close others in a de-centred way and without expecting anything in return - though the odd thank you does give me warm feelings!
- 7 *My mother and I*
have at last after 50 years of struggle, found a way of relating, albeit at a considerable distance for the most part (!), which feels supportive and appreciative of who we are - but there's more to do, time is fast running out, and I'm wondering whether there is the energy to do anymore?
- 8 *What gets me into trouble is*
my tendency to spend much time in 'second position' intuiting how others might be regarding me or a situation/issue, and then not revealing my developing concerns/plans until I'm some way down a journey they've not been able to make with me - talk about parachuting into uncharted waters!
- 9 *Education*
to me seems to be a multi-faceted, multi-level, continuous, and life affirming process; why is it that some people continue to learn/develop well into their 80's while others choose to (apparently) cease at an early age - what is it they are seeing that I don't/can't/won't?
- 10 *When people are helpless*
it suggests they feel they have no choice, and often this is because they've got stuck into looking at things from one particular viewpoint; in this situation any comment even or especially from a stranger who 'knows' little, can often nudge them into a new position from which other options become available
- 11 *Women are lucky because*
they're more at ease with emotion, are naturally in the 'centre' of things, relate better, connect more at a human level - hold things together; or so I thought until meeting the latest generation of careerists who probably have a rather different view of these things to be 'lucky' about.
- 12 *A good boss*
is someone who manages the boundary well - translating the demands and language of the outside into what the inside can understand and respond to in an inspired and creative way; but it's not just technical stuff - there's a need to be human in what often is a mechanistic, recipe bound climate
- 13 *A girl has a right to*
look upon and take part in a non-gendered view of world, enjoy and be successful in what were once regarded as male domains, while hopefully not losing the essence of her femininity - that part of her that offers a unique perspective on human life
- 14 *When they talked about sex, I*
felt distanced by the emphasis on the straightforward physical act of conquest, missing the more intimate emotional and spiritual side of things, and the magic and mystery - and raw fun - that a good sexual relationship provides
- 15 *A wife should*
with her special abilities in the area of emotion and relationships, focus on developing the quality of their emotional life, fostering romance, keeping a sense of mystery going, and adjusting her behaviour to provide flexible and warm support as her husband tackles challenges in his life - this is a man speaking of course!

Your initials	KK
Date	29/10
Office use	467

16 *I feel sorry*

quite a lot these difficult days when I feel the pain in many parts of the world and can do nothing about it, especially when it's to do with people who are innocent and helpless, and unable to extricate themselves - but perhaps I'm just feeling sorry for myself, for my own feelings of helplessness and guilt

17 *When they avoided me*

I initially felt diminished/upset, and then got to wondering what they might be noticing/thinking, realising that often what is going on inside me and what I'm intending, is not what I'm projecting or being received; and anyway perhaps it's got nothing to do with me at all

18 *Rules are*

a useful guide to what people have believed made sense to some/many people in the past in particular situations, and to streamline operations; however I feel they need to be challenged and looked at afresh as time continually changes the conditions that made them relevant/principles that guided their choice

19 *Crime and delinquency could be halted if*

the basic supporting conditions could be altered: everyone felt enabled to get what they wanted by employing legitimate means, there was a strong sense of the collective good but acceptance of differences, and people felt they had time - but not much chance in the individualised, short termist, and fear ridden world we live in!

20 *Men are lucky because*

we live in a world of double standards where we can get away with all kinds of behaviour that women would never be allowed to get away with - mind you this isn't necessarily something to be proud of; but on the other hand, the extra latitude probably brings society some wider benefits - more innovation hopefully?

21 *I just can't stand people who*

have closed minds, misuse their power to achieve selfish ends, and worse, represent their acts as being in the interests of people around them - but of course most of us fit this description at certain times!

22 *At times s/he worried about*

"S/he" should be read as she by women, he by men

what kind of world his children and grandchildren were going to have to live in, given the blinkered way many societies particularly in the West, continue to live in unsustainable ways - now made worse by the huge step up in uncertainty following the events of September 11; where is so-called progress taking us?

23 *I am*

someone of whom people will say - he never really realised his full potential: and they'll be right because there are so many projects/abilities I still wish to master and time is running out; but on the other hand, maybe I'm already at my limit and it's just my ambition to be a 'renaissance man' that's not realised!

24 *If I had more money*

but it would need to be a lot more money, I would go out and spoil myself by buying a £1000 classical guitar - and trust that its sheer good looks/beauty of touch and tone would inspire me to greater efforts; on the other hand I might just consider this but spend more on my children & deserving causes: habits are sticky things

25 *My main problem is*

I won't prioritise/let go of my wide array of interests in order to develop the level of skill/contribution to society that would satisfy me in a particular area - so years go by and I feel I'm having 'affairs at a distance' with these many temptresses: maybe the truth is that I enjoy these mysterious affairs more than the real thing?

26 *When I get angry*

I'm always shocked and surprised by its suddenness and explosiveness: it seems to come from nowhere and, as someone who likes to be cool and controlled, it's upsetting and I feel I've let myself and others down, particularly if it's one of my children - but it certainly has an effect and perhaps it should come out more often!

27 *People who step out of line at work*

should be congratulated and rewarded for taking risks and bucking the system - far too many companies are going to sleep because in the service of consistency and control, they've cowed all their staff who a la Foucault, now self police themselves into dreary, cautious uniformity - where is the creativity?

28 *When his wife asked him to help with the housework*

he realised that in his focus on his career he was not only ignoring all the things she did to support his working life, but who she felt she was while she soldiered on alone; so surprisingly he felt very ready to help - but ideally not doing the dishes which was a particular dislike of his from his childhood days

29 *If my mother*

lived in this country rather than 7000 miles away in South Africa, she would be able to see her grand children regularly, feel a real part of my family, and enjoy in her later years after a hard life, the fruits of a good life we live in England - but the time for that passed a long time ago and so we have to live with our disappointments

30 *Usually s/he felt that sex*

"S/he" should be read as she by women, he by men

was a powerful, exciting and forever changing act despite the fact that it was with one partner - somehow it seems possible to keep it fresh, fun, romantic, intimate as well as earthy, boisterous and animal like

Your initials KK
 Date 29/10
 Office use 467

- 31 *My father*
 was a charming, witty but unreliable man who disappointed and wronged my Mom, and left and let me and my sister down while we were still very young - I have in reaction become super reliable with my family but it's funny. I do wish I could have known him better before he died, and inherited more of his outgoing nature
- 32 *If I can't get what I want*
 I tend first to step back going into analytical/creative mode to see what else I might be able to do in order to get there - I don't give up lightly and am happy to extend the time horizon; however - and this is a regret - I generally don't make enough use of the political dimension or use my emotions to press my case
- 33 *When I am nervous*
- 34 *For a woman a career is*
 still an option but a difficult one: she can choose to be a full time 'leisurely' wife/mother focussing on the home/family/friends etc and regret her development; or she can work full time and worry about being a real woman: or she can try and do both - and then a sympathetic and flexible husband is needed!
- 35 *My conscience bothers me if*
 I know I should be doing something, I feel there are others who also think so, and I procrastinate and am afraid of doing it
- 36 *Sometimes s/he wished that*
"S/he" should be read as she by women, he by men
 he could live his life over knowing the things he knew now but with the youth and time to make a better fist of things, to fulfil his potential and make his special contribution - and then he would get energised to get on now and make the most of the time still 'allotted' to him!

We would appreciate the following information to contribute to ongoing research about this framework

Your age	Your gender	Post-school education and training
59	male	BScEng, MBA, Fellow of IMC

Returning this form

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APPENDIX 3

John's 'reflexive biography: extracts and comments on John Wallace essays/logs

So this would be a partial reflexive biography containing up to *six levels/layers of reflection* on student learning experiences during the programme: their own essay reflections (2) on their learning log reflections (1) on experiences during each Phase; the coach's original reflections (3) on the reflexive aspects of this double reflection, as contained in the 'coach comments' on the original texts; the coach's present day reflections on re-reading these materials (4); the student's present day reflections (5), hopefully provoked by the coach's comments, on the previous four levels of reflection; and finally the shared 'knowing of the third kind' reflections during the video interview/dialogue (6)

The foundation text for this paper starts on 9 October, 06 and finishes on 10 February, 08. The excerpts, taken directly from the original online documents, are dated and are offered generally in strict chronological order as though they *were* part of an ongoing narrative. The overall framing, continuity, and meaning of this patchwork 'development narrative' is the challenge this document poses to John and myself. As with earlier students materials, I've made use of different colour codes to indicate the nature and status of the texts that are included here:

Black	original text by JW
Black	original comments by KK on this text
Highlighted time	perceived critical words/phrases that caught my attention at the time
Blue	KK comments posted recently when reflecting on the extracts
Orange	extra material added from learning logs to 'fill out' story (including <u>KK comments</u> underlined)
Green	comments added by John after he'd read this patchwork text

Any sensitive information has been suitably redacted like this [REDACTED]

Essay 1 Dec 06

The first true immersion in reflective learning and development was the Higher Command and Staff Course in the year 2000. There we trialed a study into competencies of senior leaders. I learned a great deal about myself and in particular my weaknesses as a leader.

p 3 I am keen to exploit learning from two different perspectives...my leadership role which involves leading over two thousand staff through a major change programme ... (and) to develop greater leadership capability in all my staff and instructors... making... (them) more understanding learners and followers I like this 'double view' of your task

p 4 I was particularly intrigued as to whether a military leader with 30 years of practical leadership experience would indeed be able to readily adapt his style and behaviour to greater effect. Your questions provide a lively lead in and identify your mindset

p 5 Having now completed a more... reflective term of study... convinced that to undertake such study, at the same time as practicing it in the workplace and reflecting through constant engagement with work colleagues, fellow students and tutors, means

that it becomes more readily understandable, applicable, beneficial and enjoyable. That is progress indeed in the last few weeks compared with my earlier periods of leadership study. so what represents 'progress' and what counts as 'evidence'....? Earlier periods of leadership study were brief immersions – a day of training here – maximum a week of leadership development there..and so on. The benefit beginning to appear here was from the constant study, reflection and dialogue superimposed on top of the work routine in my leadership role.

I can see already that I am about to embark on a stimulating and thought-provoking experience. I hope I can put the resulting "active wisdom" to good use and do my best to think greatly of society's function rather than simply have low thoughts.

p 6 The challenges of leadership at the highest level, in a western democracy beset by individual priority over the group, has created conditions where leaders simply cannot meet the requirements of the social identity approach to leadership; the constituency is too diverse and self-interested. Somehow **we need to redefine democratic leadership**, and urgently. This is a very useful insight cum claim: maybe you might consider doing more work on explicating this idea? I note that the forthcoming Exeter Business School Annual Forum 2009 will be discussing a similar theme : "Looking at 'future leadership' there is a question about where the new generation will come from and who will be their role models – i.e. how do you rebuild trust amongst stakeholders and colleagues and recognise talent in a world in crisis, one that needs market-based enterprise?" Maybe a dissertation theme?

p 7 ...my learning style is such that [previously] I have largely accepted (assessments) and then simply disregarded them. The **laissez-faire style** of the extreme accommodating type has meant that I have been very neglectful in seizing opportunity to develop myself as required.

p 8 (quoted from a ██████ assessment in 2000) ...you are emotionally stable and assertive, without the need to be overly forceful or aggressive...quite trusting of others...your interpersonal warmth, your group orientation, and your relaxed manner...probably appear...quite friendly...does not suggest that you are strongly practical or logical in your approach...tendency to be too subjective, and also to be spontaneous...may...**make it difficult for those around you to "know where they are" with you**...(Anon 2000) Is this how you are with superiors, peers, and subordinates? At the time I thought this was a very incisive comment by an analyst assessing our leadership styles. It is how I am – with all those people and family alike.

I am beginning to realise now the leadership strait-jacket I have been tailored to fit; not that this is uncomfortable but I can see that I certainly need to flex in a number of directions

I am so extreme in my leadership, personality and learning style that it is very difficult indeed to make changes to it. A second best must be to acknowledge the fact and compensate accordingly when appropriate.

I know just how often I take a negative view of things. I will attempt to change my behaviour for the better and be more positive in all situations, not just leadership ones

“To make strength productive is the unique purpose of leadership.” (following talk by Dr Alex Linley)

p 8 ...has permitted greater confidence in my leadership role and a willingness to interact differently with my management team and other subordinates and stakeholders. I have begun to experience a conscious and continuous ability to build on identified strengths and compensate for weaknesses. this sounds like an exciting change – could you develop the story more as we go along? I have begun to engage more willingly with my workforce at all levels and spend more time listening to their concerns...I need to be more rigorous in time and work management and immerse myself in more detail...previously been loathe to become involved in. ... I am finding my relationship with my senior management team more fulfilling as I am better able to identify their strengths and weaknesses and develop the whole team to better effect. This looks like impressive progress. To really understand what you mean, I would have liked one or two more practical examples of e.g. ‘develop the whole team’ I discussed realizing that my Project Manager was being over dominant with his team – and using tools to engage with his staff...and him... which made him realise that he should delegate more and involve people imaginatively and creatively rather than merely directing them. The whole dynamic improved and outputs were more effective.

There is a significant national debate about the affordability, viability and employment aspects of PFI/PPP solutions... Personally I believe the long term value of these projects is not proven and I see them as a way for the government to demonstrate short term renewal and progress but at an undisclosed or undefined long term cost... this has given me an ethical and leadership dilemma...not personally convinced...the PFI/PPP is the best way forward...either short term operational delivery or...long term viability for the Department.

I have to remain balanced, optimistic and positive; but painfully sitting on the fence on many occasions; willing to argue the case for the deal but at the same time acknowledging the pitfalls.

In the Kolb Learning Style analysis I am positioned well into the Accommodating (Active Experimentation/Concrete Experience) quadrant of the model

pp 12-13 The Kolb Learning Style Inventory model has already been of considerable assistance in understanding (I use that word rather than recognizing because I always knew they were there) my own shortcomings in the more structured, analytical and theoretical fields. This is a very important insight: leadership is always ‘leadership-in-context’ My week 5 Learning Log clearly exposed my own shortcomings with regards to my role in the Public Private Partnership work:

I am also facing another issue at the moment in that my strong practical and subjective views are being subordinated in the evaluation to detailed analysis, scoring and financial investment appraisal. I have strong gut instincts about the most sensible way forward and this is tending to clash with the outcome of the more objective work. It is always too easy to then **discredit the detailed analysis** as being based on flawed parameters and weak complementing methodology. I have a habit of **criticising such process** but without the skills, time, knowledge or patience to suggest alternative methods. In response to this observation I much welcomed comment from my tutor which was:

I would strongly recommend you do not lose faith in your primary 'accommodating' style - for this I read your 'intuition'. This is your foundation

and your trump card so use it wisely. ... you work within a network full of these other capabilities, so mobilise these in the service of the task and keep your own powder dry for those tasks/events where your stronger grasp and feel for the political dynamics of the situation is critical. (Kinsella 2006)

(further comment from KK on this learning log entry not in essay but inserted here)

Perhaps, rather than using the combative tactics that have served you so well over the years on your climb up the hierarchy, it might be more effective to support/guide and demand more of these more rational/technical efforts of others with less experience than you. Don't fight them - ask for 'more and better' so that your intuitions can be tested against so called 'harder' data. You might see this as 'compensation' but equally it could be seen as shrewd use of your unique talents.

(and later response from JW to this comment and also not in essay, inserted here)

Thanks for that comment. I can see that asking for "more and better" is a tactic I can productively use now. I have been asking for this but in a negative way rather than a positive one - by reversing the negative psychology here the whole atmosphere could be far more productive and beneficial to the team.

in my view it is personality and personal interaction that is most critical in a leadership situation.

p 13 What is increasingly clear is that there is no one, single or simple leadership theory that is of overwhelming utility in all or most situations...different situations...require different leadership models and theory. A recurrent theme in this essay though has been the utility and application in the workplace of much of what is being learned. I am clearly seeing the advantages of the "close learning" theory described in the introductory phase of the course

In this first 'chapter' JW identifies his main challenge as the complex PPP project. The dilemmas he experiences with this, he feels places him in an invidious position and he often ends up 'sitting on the fence'. He becomes more aware of the 'leadership straightjacket' he's been inhabiting in the Army, and also feels his leadership and learning styles have become extreme and so difficult to change. He also regards his approach to responding to feedback about himself, influenced by his extreme 'accomodating' preference, is laissez faire and that this and his default 'negativity' is harmful. He commits himself to a more positive approach to things but worries about his self discipline in carrying this through.

During the phase he surprises himself in how much and how quickly he is learning, finding the 'close learning' approach to his liking. In particular he finds that by framing relations with his immediate staff in a more collaborative manner ('more and better'), he is able to address the challenges in a more balanced way and play to his own strengths and those of others, more confidently I think the word "confidently" is correct here. The coaching assisted in identifying strengths and weaknesses; but most importantly the tools to adjust in a positive manner. I am not an inwardly confident individual and this comes through clearly in the logs. The coach's sensitive handling and positive encouragement were useful facets.

Essay 2 March 07

I have to admit being challenged by the notion of Grint's constitutive approach... I do not pretend to understand what it is trying to say...but the essentialist qualities of a leader are always going to be key.

p 5 Increasingly the leader needs to be able to trust his followers just as much as they have always expected to be able to trust the leader; all of this putting any relationship based on mutual trust under increased pressure. this mimics but reverses the mantra 'think global, act local' into an 'acts are local, accountability is global' – so leaders watch out!

the step from Machiavellian leadership to more peaceful democratic leadership is a big one; and I have consistently criticized the western world for expecting such states to adopt too easily to such a new regime

p 5 I had already formed an opinion during this Phase that “mutual respect” or “mutual trust” is an absolutely critical facet of leadership.

the question of how to attain loyalty and commitment from a mercenary work-force is a major one

p 8 The UK Armed Forces practice mission command; a philosophy within which all team members understand the higher intent and their freedom of action, to optimize performance and speed of thought and action at every level. This is a clear example of distributed leadership.

p 9 In terms of my own leadership role this apparent contradiction between individual and distributed leadership is clear to see. The PPP programme affecting my College is a stark example of corporate economy of scale being delivered and I am a leader, follower and stakeholder all at the same time.

p 10 I would contend that the real issue is that profound, charismatic and strong individual leadership is required more and more. Then this is something you should continue to work on The alternative – the chaos theory – is unthinkable.

p 11 The key issue that has arisen is quite clearly the balance between the more traditional role of an individual leader and a more distributed approach to leadership.

I'm very much cheered by your increasingly positive stance towards the effects of 'over-management' in the Army and your confidence to challenge what's going on using a perspective that seems much more grounded in what we might now term 'leaderly' principles (KK response to JW log entry)

p 11 I now have a much greater understanding and feel for the way leaders, followers and stakeholders need to interact...must start with acknowledgement of differing perspectives and understanding of relationships and positions...which clarifies where individual, team and cadré leadership...best apply.

As an MBTI ENFP I have always erred toward the imaginative, innovative and creative side of leadership

p 12 Within any such leadership model I still remain convinced that trait theory, of all the traditional theories, is both enduring and fundamental. Are you regarding 'traits' as essentially things possessed by individuals or as more dynamic and flowing qualities characterising behaviour in relationships?

I certainly do not believe that key underlying characteristics fit people for a very wide range of leadership tasks; let alone "all circumstances".

learned much from these two...over 4 formative years...never to bully, intimidate or abuse people but to praise, nurture and build them...maybe the experience was so profound that I have over-compensated?

I am certainly beginning to form a strong opinion that good leaders are born and not made... What is lacking from all this analysis is some form of clarity as to where...management stops and leadership starts; in terms of hierarchy as much as in terms of functionality

I know that I have the experience to bounce sensibly from one leadership style to another depending on the follower audience and the situation. Where I have more difficulty is being a strong and principled people person and seeing the resource managers and financiers decimate the armed services through over-commitment and lack of financial resource. A real conundrum and one that requires a lot of fighting spirit.

"It may be necessary to reduce ..emphasis on commitment to the leaders strategic vision in order to cultivate the tolerance of eccentricity which will encourage the expression of the full range of team member's views, some of which may conflict with the stated vision of the leader."

I am finding that I am changing, albeit slowly, as a leader due to this study. At the heart of this change is a greater realization and awareness that people are all very different in their ambitions, motivation and skills.

p 14 ...it is clear that the tensions between individual and distributed theories of leadership exist; just as tensions between demands of leadership and management exist. There is further confusion, of a very significant and potentially dangerous kind, caused by the lack of understanding of the leadership context within a rapidly changing, global and networked world.

In this 'second' chapter JW enjoys the wide variety of models of leadership offered in the readings. He identifies the issue of 'mutual trust' as critical to leadership of any persuasion. He begins to think about the tensions he experiences between 'individual' and 'distributed' models' – he sees the 'mission command' model as a good example of the latter – and feels he himself (in the role of leader, follower, *and* stakeholder) is caught up in the contradictions between these approaches.

This experience helps him realise that there is a greater need for *interaction* between these 'roles', and that this must start from a greater acknowledgement of the differences that will exist. At the same time he also identifies the confusions that exist between 'management' and 'leadership' and the critical need to look to matters of context to clarify these. He continues to believe that strong individual leadership linked to trait theory is an essential component of any solution.

The 'what' dilemmas with the PPP project are now being overlaid by 'how' dilemmas associated with tensions between 'individual' and 'distributed' models and the differences between 'management' and 'leadership'. To help him better understand these he has begun to construct or even 'constitute' his own Stellar model of organisation functioning

Had I continued in my leadership role and complex change programme without these insights I suspect I would have really struggled. As things were.....the nature of that change programme faltered and then changed.....I embarked on a fresh programme with far greater awareness and skills to handle continued complex relationships. This felt a very comfortable period compared with the previous 2 years. Understanding of all stakeholder positions and issues became increasingly key to realising what was going on around me at all stages.

There are no learning logs during Phase 3

Essay 3 May 08

p 4 In my learning log of Phase 2 Week 3 I commented that:

I do not think gender, age, ethnicity etc are important as underlying assumptions, rather I am struck by the confidence that Zaleznik has in differentiating leadership from management and the leader from the manager...A significant benefit is realizing just how to adjust my own relationships in the organization as I develop a clearer understanding of people's strengths and weaknesses.

p 6 Key themes for both of us were delegation, motivation and organization – the latter particularly regarding the balancing of strategic and operational roles.

p 7 At the heart of my leadership model I saw the need to establish a values-based organization. I see values, ethos, culture...as being far more important in an organization than missions, sales, outputs or other such hard management targets. what in the old days was called the 'informal' aspects of organisation

p 10 Here was a significant lesson for my own leadership role. Whilst I have a vision for my College as a training centre of excellence, with huge investment from an outside partner; perhaps my own people are satisfied with the status-quo; many as civil-servant grades along with the concomitant security and limited potential for advancement. this is a good insight, transferring a perception from one context to another If you are content to be working in the social or public sectors; this perhaps indicates a work-life balance that you are satisfied with, and vision is perhaps anathema to your needs; or at least too ambitious or radical a vision is.

p 10 Both Julie and myself believed a vision was important but the 'question' remains whether it needs to be personally owned by the leader, corporately owned by the board or comprehensively owned by all stakeholders.

p 11 Firstly we are both comfortable working "on the hoof" or in an otherwise spontaneous manner. Secondly we are not good at planning, as opposed to thinking, ahead; whilst energetic the energy does not go into organization. Thirdly we probably both **take on too much personal responsibility and try and save the time and efforts of others by protecting them from too much delegation.**

p 12 Delegation and trust are key to motivating people in my experience, using the team and their individual skills to optimum effect, giving free rein to achieve accompanied by adequate direction and resource. Taking an interest in the work is important, but without interfering where you have delegated

p 12 I have accepted the Army core values as those to be applied within my training College; courage, discipline, respect, integrity, loyalty and selfless commitment. There is a tension though given the context in which I find myself working... My vision for the College, to be a national centre of excellence for [REDACTED], is only likely to be achievable within the PPP programme... They do not wish to see their posts re-located... My vision requires these things to happen. **So how can integrity and trust flourish when my vision is at odds with the aspirations of most of the workforce?** This seems to be the key question facing you right now – and as you are experiencing it as a dilemma, it certainly is a question of ‘leadership’ requiring the development of a shared vision that can pull together a range of rather diverse stakeholders, and the development of sufficient shared social identity to carry the project forward

p 13 my vision must be contextual, influenced strongly by factors from above, and so constraining my ability to lead. Julie has greater freedom in deciding the vision... I am perhaps too people-focused at the expense of operational outputs... bending over backwards to look after every person in the organization where there is clearly efficiency to be gained by privatizing, rationalizing or otherwise reducing capacity this is a good bit of reflexivity, using an observation of the other as a stimulus to query your own values

p 14 Julie concluded her write-up on the exchange with the words pragmatic, passionate and dedicated to service of his colleagues... it reinforced my view though that an exchange with a different style of leader could have been quite uncomfortable but perhaps more useful...

p 15 I have noted that much of the leadership theory studied so far is inadequate in meeting the needs of these more dynamic and multi-faceted contexts

In this ‘third’ chapter, having enjoyed a more experiential interchange with someone of similar spontaneous preferences, JW revisits the importance of integrity, one of the Army’s core values, and the role of vision, delegation, and trust in motivating people. He uses his emerging Stellar model to help him make sense of the exchange experiences and as a result feels that he is far more constrained than his exchange partner in terms of being able to offer leadership as against management.

He feels very keenly the conflict between his own desire to establish a national centre of excellence, and the dependence on the PPP process going through, and the desire of his staff for things to stay the same. Though he again expresses concern that he might be too people focused in his practice, so missing opportunities to improve efficiencies, he asks how can integrity and trust flourish when his vision is at odds with the aspirations of most of the workforce?

Essay 4 July 08

p 3 clearly a strategic change programme in the category of the “deepest” form of change... changing how we think, how we solve problems, how boundaries are defined and the way we do business

p 5 my leadership role often sees me **sitting on a fence** this sounds like a difficult role to play when you’re no doubt expected to take the ‘cabinet’ line and balancing the various arguments over a sustained period. Furthermore it is very difficult to influence the change programme as a middle-ranging stakeholder and therefore a strong feeling of lack of personal engagement exists.

p 6 Here I noted that the shift in climate and culture can take effect immediately climate or working atmosphere, yes; culture which has deeper more unconscious levels, I suspect takes longer and perceptions can be changed pro-actively and dynamically.

I like Mintzberg’s quote from Kierkegaard that “life is lived forward but understood backward”. I think that military people instinctively understand that concept – sadly civil servants seem not to

p 7 this is the biggest single failing within the ██████ change programme. Not only is there a lack of sharing but also the change management and cultural structures significantly inhibit sharing

Finally...is the reinforcement of the lesson that change is often best identified, implemented and measured from a bottom-up direction. This is a recurring theme of this phase and the MOD is imposing rather than encouraging change in the PPP. Emphasis on buy-in and contribution at all levels is overdue and needs to be encouraged.

In a partnering programme...numerous stakeholders have to agree a common vision and modus operandi if process and outputs are to be optimized. This concept of “leadership in partnering situations” remains an interesting one

helps to explain what I considered to be a “mamby-pamby” response when I first read the case study...I must recognize that I have been trained over many years to ignore hardship and “get on with the job in hand” or “make the best of a bad job” which is a requirement of military leaders.

I suppose I am arguing that ambiguity helps people to retain a position of balance – able to consider pros and cons and keep a variety of options open....it is better to sit on a fence for a long time even if it is painful; than to jump too early to the side where the cess-pit is.

The LPG has been a useful tool to break down the incident and reflect on actions and outcomes. It has demonstrated that I fell into the trap of anticipating or assuming that SK had been head-strong and mis-read the situation, and I was more willing to criticize than support his actions.

p 8 In his characteristics of change leaders he identifies a number of points which I very clearly recognize from my own experiences:

- Commitment to a better way
- Courage to challenge the existing power base and norms
- Personal initiative to go beyond defined boundaries
- Motivation of themselves and others

- Caring about how people are treated and enabled to perform
- Staying undercover and not seeking glory
- Maintaining a sense of humour about themselves and their situations

As a middling leader in the [redacted] change programme I have a real affinity with many of these characteristics....These "guiding coalition" points are some of the most profound lessons from the [redacted] programme

Generate an initial set of rules of engagement...guide your thinking and action in... key interactions

1. "...be the change that you wish to see in the world." (Gandhi)
2. clarify intent to peers and stakeholders.
3. involve in process change rather than resist or be too dogmatic.
4. listen before forming opinion.
5. acknowledge needs and desires of others.

p 13 the biggest lesson for me...is that collective sharing and learning have not occurred in the [redacted] programme. It is also such a large and lengthy change process that I am limited in my effect as a leader in both time and scope. I can use this significant lesson, among others, in my future leadership roles

In this 'fourth' chapter, JW is beginning to look at employment opportunities outside the Army, in particular an opening in education. He is wondering about his capacity to do such a job and starts looking at his ongoing Army experience with different eyes. He uses the assignment to help himself think through how he might pitch for the external post, using his learning to create a notional parallel story about how he might approach the challenges there.

With the benefit of a broader perspective offered by new ideas on strategy, culture, and managing change, JW realises afresh that he is actually in the midst of a very complex change process – and that many of his feelings of frustration may be inevitable features of such programmes. He identifies with the qualities described as being associated with effective change leaders, and values the lessons offered on change management, particularly those to do with gaining support from key stakeholders. He is aware during this period of two contrary feelings: a heartfelt sense of powerlessness from being what he sees as just a middle ranging stakeholder of the project; and a more cognitively based sense of optimism at how quickly it may be possible to change the working climate.

This reinforces in him the conclusion that one of the biggest barriers to effective change is a lack of involvement and shared thinking within such stakeholder groupings, something he first identified in Chapter 2 some 6 months earlier. His dilemma seems now to be associated with what such leaders as he, just middling stakeholders, can really do to influence such large scale planned change processes. He finds the Kotter change model to be of great help in thinking about patterns of effective change, and uses his learning during this period to add further sophistications to his Stellar model - which is now starting to feel like a trusty old friend which might allow him to deliver a far more sophisticated level of leadership.

Essay 5 October 08

The difference between monitoring the discussion, and leading it, was marked in my ability to better understand the dynamics.

p 4 My intolerance of what I perceive as a lack of leadership and vision among other stakeholders has to be moderated when set against this more complex distributed model.” a good point – when you ‘blame’ the ‘leadership’, it is about you too; we are all implicated in some way with the status quo

p 4 used a phrase above “struggled to reconcile my own views about the programme with those of my staff and maintain loyalty in all directions”...gives a useful indicator of my own leadership style and approach in the PPP change programme so far. this is a good reflexive point which hints at important values you hold: what in particular has this struggle been about? As fallback plans develop I can see that I definitely need to be adjust my own style as I have learned that we cannot all be content and enjoy affable relationships all of the time.

p 6 I should have been quicker to engage with [REDACTED], stronger in asserting the change requirement and less tolerant of his deeply-rooted reluctance to make the required change... friendship and past knowledge of a person does not mean that you understand where they are coming from...lack of engagement due to personal circumstance...likely to delay events...maybe less sensitivity and more engagement should have been the order of the day.

p 7 the classic mix of ENFP/ISTJ that is capable of envisioning, planning and then delivering a change programme.

p 7 knows that I have developed an understanding of my own relative strengths and weaknesses...have shared my observations and lessons from the MA course with him...each therefore compensate and empathize within our relationship...described as the “conscience of the PPP programme”... **earlier engagement and understanding** of each other’s strengths and drivers would have been more productive

p 8 the leader being the outer surface of an umbrella, facing outwards to see what was coming and protecting the organization underneath. The chief of staff needs to be the underside of the umbrella, looking inwards and ensuring everyone is in good shape.”... establish the working practices, discuss the respective responsibilities and determine the modus operandi at a very early stage

p 9 relationships must be gripped sooner rather than later...suffered [REDACTED] rather than trying to proactively develop him... My own style of **avoiding confrontation** did not help...it is better to face up to difficult relationships sooner rather than let them fester and allow them to impact on other dynamics within the team

p 9 my accommodating style tended to accept or compensate for the situation rather than actually doing something about it...with hindsight. I could have been far smarter and more proactive in engaging with my team members more quickly and profoundly and...the coaching style of questions are very powerful to cope with the majority of leadership relationships and dilemmas.

In this ‘fifth’ chapter JW starts to use words like ‘moderate’ and ‘reconcile’ as he reflects on the challenge of being in touch with and loyal to all interests. He also admits it’s not possible to continue to offer affable relationships all the time. He uses the coaching activities during this phase to deepen his reflections on his relationships with own staff.

From this insightful analysis, he concludes that he has allowed his accommodator preferences to avoid conflict, camouflage opportunity, and over compensate for situational difficulties. With this comes the realisation that he might well generally have done better to have acted more quickly and proactively, especially where there have been difficult relationships; and better too to have exploited team working possibilities through forging an early and mutual understanding of strengths and weaknesses. He feels the coaching skills he has been studying provide just the tools he needs to do just this in future. I suppose “some of the tools” is more precise. Certainly the use of open coaching questions allowed me to bottom-out a number of issues with one or two strong-minded people where previously we could have clashed.

Essay 6 January 09

Counter-intuitively; leaderful practice needs even stronger central direction and leadership to make it work. Organizations could go out of control and lose direction if too much self-determination at all levels is allowed to kick-in.

I am increasingly thinking that the solution is an understanding of all types; an ability to think reflectively on how and when to use them; and a knowledge of how to measure and assess their success.

I particularly liked the phrase "concerned myself principally with the conservation of the means and their progressive use" (Gandhi)... I react positively...that values should underpin all thoughts and actions and that means rather than ends are the key driver. But where does this leave the important role of a leader in articulating a vision?

The social identity lens is a tantalising one...concept of leadership and management qualities being attributed by followers rather than being attributes of the leader...perhaps the most useful given the very dynamic and fast-moving nature of the world today. Relationships are increasingly fleeting ones and perceptions are quickly made and judgements and decisions are more likely to be instantaneous.

p 3 this course of study has helped me to analyze, understand and reflect on the manifestations apparent within the PPP change programme...also helped me to adapt my own views and behaviours to better cope with the often conflicting issues arising.

p 3 Phase 4 of this course...on...strategic change, proved to be a key phase in helping me in my leadership role.

p 3 important was the confidence gained...in realizing that the features of strategic change I was encountering as a leader, were common in much of the theory and other areas studied...I am a part of the MOD and public sector – an inherently bureaucratic organization; but at the same time I am involved in a very deep form of change programme

p 4 response from my tutor to consider Jonathan Gosling’s concept of “leading continuity and change” rather than just “managing change”...challenged me to consider what should be maintained stable or left for subsequent change...what could I influence and what was impossible to affect.. tutor further challenged me...it is the very core values that need to be transformed while other aspects like bureaucratic process may be

something to hold onto for later on when more stable times emerged. Interesting - this is one way of interpreting what I said! What I think I meant at the time was more to do with what *should* be protected e.g. long term values and core skills... rather than 'what could I *influence*'...You have found a different and useful meaning more to do with what is feasible and what should be ignored

p 4 This prompt to consider what was important within change and what was constant; what I could influence and what was inevitable; and where flexibility existed and where it did not; was useful in explaining many events of the previous two years. **A tool I have used recently in the business context with my son and colleague. Don't spend time worrying about and trying to influence things which have their own inertia and complexity....target your time and energy well....all increasingly important in a complex world.**

p 5 the issue of **affordability** by the MOD was clearly going to be a big issue. With hindsight I can see now that this was at the heart of my leadership dilemma. Whilst I knew my people were largely against the PPP for philosophical reasons, I also had much inner doubt caused by concerns within the strategic plan over affordability and risk, as well as lack of support from my team

p 5 problem became very clear to me when considering the situation using Mintzberg's simple yet highly effective concept of **deliberate and emergent** strategies

p 6 Seeing these 'dynamics' through the Mintzberg concept has been immensely useful in recognizing the various 'dynamics' and, most importantly, allowing me to shift my leadership emphasis appropriately to cope with those 'dynamics'

p 8 key lesson here is to remain very flexible about emerging trends...be very adaptive in terms of strategy

p 12 I deliberately steered away from too much structure; encouraging innovation and creativity

p 14 there needs to be a careful balance between loosening the reins and encouraging creativity on the one hand, and losing control on the other. However I know instinctively that leaders will thrive on mission command, and I am prepared to see some minor process failures in the achievement of a more radical and creative way forward.

p 15 the opportunity to **perform my college leadership role more effectively** is without question, the programme's principal benefits, both personally and organisationally, have been fully met and indeed surpassed my expectations...I highlight the benefit of the study design in being able to apply what has been taught, to my leadership role, and then to immediately benefit from that experience.

p 15 My weaknesses have been starkly exposed: I can be intolerant, very subjective, impulsive, sensitive and difficult to read (very ENFP!). I have learned to be far, far more aware of other people's styles, strengths and weaknesses... far more aware of the foibles of planning versus leading...balanced the demands of management against leadership; and vision against structure and values. I have struggled with the **notion of distributed leadership**; can there be leadership if we do not have a transactional

relationship between leaders and followers in what, in a natural and evolutionary Darwinian sense, will always be hierarchic communities?

p 15 my main conclusion...is that leadership is based on inter-personal relationships – resulting in a team effort.... my leadership at work and my relationships at home have both improved considerably from this study. I am more understanding, confident, relaxed and tolerant than when I embarked on the coursebut maybe have slipped back “to type” a bit in recent months. This most recent discussion and analysis demonstrates the continued benefit of coaching interventionthat important role of “holding up the lens” and “acting as the catalyst for reflection”. Whereas coaching is usually seen to be a short-term intervention ... should it be a longer term relationship to be most beneficial?

In this ‘sixth’ chapter the PPP project has come to an abrupt end and declared unaffordable. JW now has a unique opportunity to renew and refresh the change process he has been managing manfully but with great difficulty for the past 3 years. He is also faced by the probable need to interrupt his studies, so he is clearly beginning to think about consolidating his learning – where am I up to with this leadership thing? One new insight he confirms, which he’s found useful in explaining many events of the previous two years, is to do with ‘change and continuity’. In this he has found it helpful to identify not only what is important in change, but also what he could influence, assessing where flexibility exists and where it does not.

With a new sense of confidence gained from the realisation that his dilemmas are common in complex contexts undergoing paradoxical change, he begins with a new sense of energy and purpose to reconstruct the change narrative with his staff. In this he makes use of lessons he’s been learning over the preceding 15 months particularly to with the ‘dynamics’ of change processes. Here he feels it’s best to remain open and flexible towards developments in the external world and be ready to adapt strategy to suit. As an example of practising what he preaches – and against the advice of his immediate staff - he deliberately organises one of his main workshops to be much more open and creative. He seems much more ready to take calculated risks in order to invite a greater involvement of staff in fundamental change.

He still struggles with the concept and practice of more distributed forms of leadership, still believing that there needs to be some form of hierarchic leader-follower relationship and that leadership is based on creating good interpersonal relations that will support teamworking. He concludes that the programme has helped him most in performing his college role, allowing him to ‘manage’ his shortcomings and find ways of dealing with all the conflicts and differences he is now much more aware of.

APPENDIX 4A

Colleen's 'reflexive biography: extracts/KK comments on Colleen's Phase 1 and 6 essays

Phase 1 Essay with KK Comments – January, 2006

1. INTRODUCTION

The **aim** of this assignment is to utilise the learning that I have experienced since the beginning of the MA course, incorporating Phase 1 which is entitled, "Leadership and You".

In this assignment, I intend to reflect critically on the outcomes and interpretations of the various diagnostic tests that I have completed during this phase, and also to draw conclusions about my leadership development needs for the future, which I aspire to develop during the subsequent phases. The groundwork for this has resulted in the development of a log of the discussion for a, and Learning Logs and assignments during the past term-my experiences and learning collected together for review.

Therefore in **Part 1 of the assignment**, I have identified the various strengths and limitations that I, and colleagues including my tutor, perceive in my interaction with other people. This is partly subjective and partly objective, composed as it is of personal observations of my behaviour, supported by feedback from peer observers and from my tutor. This interaction with other people is a foundation of learning to lead effectively. A simple but fundamental point which will have a range of meanings and implications depending on your take on what leadership 'means' e.g. is it mainly about the individual, about interaction, about relationships, or about process? More on this later....

In **Part 2 of the assignment**, I have used the evidence from my Learning Log, which I use as an assignment tool, but also as a diary, in order to record my experiences and feelings in relation to set work, but also what I would describe as key moments –good or bad. This is a particularly useful element of the learning experience, as it requires honesty and moments of deep introspection. This should also be about emerging development needs...?

Part 3 of the assignment is a critical commentary on the relative values of the main diagnostic instruments studied. Whilst there is a requirement to be objective and scientific this is a contested view now – see later work on *second cybernetics* (Aesthetics of Change, Keeney, B, 1983) which basically says 'what you see you see, is part of the situation' i.e. there is no objective reality without human finger prints all over it!, the nature of Phase 1 requires a spoonful of subjectivity or even a cupful! in order identify my self-understanding, and to be useful to the assessor in terms of my particular progress and cognitive style.

A very clear introduction to your essay. What would have made it more enticing is if you'd said a little bit about your current reading of the term 'leadership', and perhaps given a hint of what your basic 'headline' might be

2. Part 1 of assignment

“Leadership and learning are indispensable to each other”

John F. Kennedy

My current strengths and limitations when interacting with people, taking into account my leadership role within the [REDACTED] are as follows:

<i>STRENGTHS</i>	<i>LIMITATIONS</i>
Empathic	Lack of self-esteem
Empowering	Need to improve delegation skills
Inspirational	Avoidance of power games
Motivational	Need to develop work-life balance
Committed and loyal	Need to manage personal energy levels
Strong values and principles	
Visionary	
Encourages team-working and co-operation	
Reflective, good listener	
Optimistic	

I'm not disputing your list...but interesting how some of these could swop columns depending on the *context* you use for make your judgements e.g. being 'empathetic' could be a weakness in a hard, fast moving, no nonsense role, and 'avoidance of power games' could be an essential in some therapies

As highlighted by Theodore Roosevelt in many of his speeches, I believe wholeheartedly that “ the most important single ingredient in the formula for success is knowing how to get along with people”.

Good to provide quotes from 'real' leaders as well as the academics!

Some of the above listed strengths and limitations were known to me, prior to starting the MA. They have, however, been reinforced by the subsequent work undertaken. Others have become apparent as I have observed myself in a leadership role, and have also requested feedback from colleagues.

There are some strengths that I realise arise directly from my personality which has been moulded to a great extent by my life experiences. My ability to empathise, and the use of active listening skills, relate to my studies of Rogerian theory and Jungian analysis. I use these strengths particularly at this moment, when my organisation is going through a period of dramatic change and uncertainty. Knowing, and empathising with, the mood of the workforce, is key to planning the appropriate responses by senior management. I imagine supported by so called objectivity, logic, and realism?

I have observed the strengths and limitations of role models in [REDACTED], other public sector organisations, and respected public figures (past and present). The key factor in managing my strengths is ensuring that, at the very least, I maintain those skills and qualities, what are 'those skills' that you are referring to – the ones you've listed or the ones of role models? and at best, strive to develop them further. Complacency is not an option in my plans. However, there is a lack of investment in [REDACTED] and public sector in the Holy Grail of Leadership. As identified by Wendy Thompson of the Local Government Leadership Centre (2004), "British management is not thought to be as good as others elsewhere in the world because they have cut costs and stripped out the investment. But when you look at the features of a successful organisation, leadership.....will always be identified as the first thing". Therefore one particular strength that I should credit myself with is being persistent enough to be allowed the time to partake in this course. Yes sir – so already one tick for better self esteem!

Reflecting on my 'limitations' is vital for my personal and professional development in leadership. Possibly – again this is a contested point of view. If you go along with the principles of Appreciative Inquiry you would instead be focussing much more on developing and building on your strengths/what makes you unique. More on this later. My self-esteem, confidence and belief are major issues for me, that relate to a continuous battle with my inner self. What is this battle about...and between whom? They are also key factors that I need to concentrate on in my personal development plan. I have become acutely aware of the direct correlation between my apparent success as a leader, and my personal happiness. The word 'apparent' in this case relates to the emptiness factor what kind of 'emptiness' is that? that I experience in my personal life when I superficially appear to be thriving at work succeeding 'superficially' is like what? At these times, my lack of self-esteem, avoidance of power games and inability to delegate are reflections of a desire to be popular with all – an approach that I have long recognised as immature and futile I also like to be popular with all/many....so does that make me immature?, but to which I return in times of stress. My study of the biographies of 'successful' leaders, for example John F. Kennedy, Bill Clinton, and Theodore Roosevelt, (all coincidentally male), provides me with pictures of individuals whose personal life is superficial and/or faltering, but whose wife or partner have played a key role in their public success. perhaps these examples of leadership at the very highest level are not good role models for us ordinary mortals? This leads me to the conclusion that my lack of ability to develop my professional self-esteem may be due to a lack of a support mechanism in my personal life. (Teenagers are not renowned for their supportive and nurturing natures). It is not the gender issue that concerns me. As Billig and Alveson (2000) stated "Organisations do not need more women, but a new type of leadership....the gender debate should be engaged in with caution". For me there is a supportive mentoring relationship that I lack. Quite possibly....but again you should consider a range of options to help you with this critical life issue

You speak with courageous honesty here, Colleen...but primarily through pessimistic and severely critical lenses. Billig and Alveson are speaking here about a leadership that is relational and collaborative – something which I imagine you would be very good at if you were able to create the right conditions for this aspect to flower.

There is a requirement for me to reframe my perception of my self, in order to survive the challenges of a senior manager/ Director role in what I experience as an ageist, sexist [REDACTED]. However, it is welcoming to know that I am not alone in this lack of confidence, indeed, it may even be a strength. In Roger Eglin's (2005) report in the Sunday Times, he identifies that "the potential for leadership is manifest early in life, to be nurtured and developed through experience". Unlike many adult candidates, whose curriculum vitae would be developed with the potential employer in mind, schoolchildren's behaviour comes naturally, suggesting that there are innate leadership characteristics. So does that make you a 'traitist' now – leaders are born not made? I can identify with Elgin's (2005) citation of the Human Resources Director of Tesco, who was a prefect and head girl of her High School, as I was. She states, ".....insecure high achievers tend to go on to do well.....It's the grain of grit in the oyster that goes to create the pearl". Ooh that's painful to hear: I was head boy at my high school and an 'insecure high achiever' both at schoolwork and sport.....but I haven't done that well – what's happened to me! But maybe she isn't right about everybody?

What links the past and present in my role is a period of uncertainty and pressure, from which my current limitations are borne. The challenge for me is to use my strengths to overcome my limitations yes, yes, yes at last a positive note.....to nurture the grit, and to create something beautiful in terms of authentic and credible leadership. You'll enjoy Keith Grint's metaphor for leadership 'as an art' in the next phase This, I am determined to learn and to achieve. Great!

This part of the assignment, just as Phase 1 *per se*, has, in Pedler et al's (2002, p 76) words, shown "the value of reflecting on one's own behaviour....in a purposeful, insightful manner" And hopefully also in a balanced and optimistic manner too.

3. Part 2 of assignment

"Men do not stumble over mountains, but over molehills" (or motes in their own eyes!)

Confucius

The behaviour patterns that I would seek to change in order for me to carry out my leadership role more effectively have been painstakingly identified within my Learning Log, and as a result of tutor feedback.

The traits and/or beliefs and behaviours (which can be developed/modified) that I need to pay particular attention to are:

- Dealing with power games
- Expressing strong views in an appropriate manner

- Learning to identify, manage and compromise on particular areas of leadership and teamwork, such as being challenged, or humiliated, in alternative ways, rather than solely considering the stark alternatives
- Managing my personal anxiety about imminent organisational change, whilst also supporting others effectively.
- Reframing my tendency to ‘martyr’ myself in times of challenge or difficulty
- A requirement to continually challenge myself and my aims well maybe not ‘continually’: you should have a break every now and again! And don’t you do this already anyway?

This is a good but very challenging list to work on. I suspect that many are interconnected and so once you make progress on one, the others will start to alter as well – that’s the ‘systemic’ principle!

In my Learning Log, there is a recurrent theme about my experience of others who use their status as a power tool. Initial work identified stressful meetings where my body language and behaviour were acceptable to all, but masked inner turmoil and a sense of humiliation. Even appreciating that these incidents are learning experiences, and observing my responses, has not altered my inner feelings. It’s pretty hard to learn if you feel you are being humiliated...survival becomes everything. So maybe this issue of ‘humiliation’ is the first thing to tackle?

My behavioural resolution is to combat this behaviour by ‘psyching’ myself into feeling and behaving as a Chief Executive, and dressing as such, in order to stand out from the crowd of other ‘wanabees’. This is of course ‘separating’ behaviour which isolates you from the support of others...? And if you read Paul Watzlawick he’ll mention the idea that ‘the solution is the problem’! (<http://www.answers.com/topic/paul-watzlawick>)
 This is contrary to my values and normal behaviour pattern, but as long as I do not harm others in the process, it is a behaviour that I am willing to change. I realise that my confidence and self-esteem have been battered over the last two years, and previously I felt that I had no right to be appointed to senior positions. One tool that I have, is an ability to act to hide my insecurities by my body language. But is everybody ‘fooled’? I now need to develop a presence, and use this tool this would be much more than a ‘tool’ – it would be an expression of a new sense of ‘identity’ to reinforce the fact that I am capable and worthy. As identified by Jo Ouston (2004) in The Sunday Times, “personal presence arises from a combination of self-awareness, personal value systems and effective behaviour”. I will observe power games, but not be defeated by them. Everybody is implicated in these – it’s a matter of understanding what’s going on, how you are contributing to these, and how you could do so differently by e.g. forming ‘coalitions’ with others Instead I will notice what makes me angry or motivated, and reflect on the ‘why’. Importantly, I will begin to understand that every disagreement is not necessarily a personal criticism. Good start My aim is for this learning to reinforce my resolve, which will produce positive results, and feed back into positive behavioural responses. This may be a form of B.F. Skinner’s (1948) operant conditioning, but there are certainly personal and professional rewards that can be achieved as a consequence of this behaviour. Well I think it will amount to more than ‘operant conditioning’ (and need to be so if it’s to be sufficiently robust to deal with the pressures you are facing)

There are times when I need to express my strong views, and may state these in a challenging manner that I am well aware could be interpreted as disruptive. I have identified other senior members of my organisation who I intend to observe closely in order to identify the singular traits that engender respect from others, albeit when they

are challenging those individuals. This is a good route to follow – expand your portfolio of behaviours using good models to identify what will work for you I recognise that I need to remain calm, think clearly and verbalise the facts rather than identify my emotions. I think you should continue to be aware of your emotions – they are a key piece of information – but find different ways of using that information to energise your thinking and behaviour In the current working environment in my organisation, feelings and emotions are not considered appropriate in discussion or debate, and so I must adapt myself to the situation whilst not sublimating my true passion and energy for the subject.

I have been greatly enlightened by my Learning Log, and my tutor's responses on several occasions, and the revelation for me is contrast - namely that I either see a positive side to outcomes, or a stark one. What do you think is the dilemma you avoid by having this particular strategy? I find it challenging to compromise in my personal and professional life, as I appear to be obsessional in attempting to achieve the best in both. I am beginning to realise that my behavioural (and attitudinal) resolution must incorporate 'good enough' and 'compromise' as factors to embrace. This sounds promising This will be particularly difficult, as currently I work to a Chief Executive who highlights the errors, and does not praise the successes. As an 'introvert' you are likely to have your own standards to go by, not really needing too much recognition from others - though it all helps! This attitude reflects my treatment of myself! My learning must be to manage my own expectations, and be discriminating about my own performance. I think 'discrimination' is a key word for you to work on...expanding your range of possible responses and meanings rather than the stark black/white approach you favour at moment.

Managing my anxiety whilst still supporting others has been greatly assisted by my Learning Log work. In the past, I have been confident that I will benefit from change, but this time I am uncertain. My behavioural resolution is to practice the factors identified above, and abandon my worries to the unconscious mind, realising that I can influence outcomes by behavioural and attitudinal changes.

Reframing my unconscious need to martyr myself may bring about the greatest change in my personal circumstances. I have noticed this tendency, tried to ignore it, but close friends and family comment on it, yet to see it noted starkly in my tutor's feedback was perhaps the shock that was required to realise how blatant that tendency is in my make-up. To change this requires a personal physical challenge that I have planned. As Bennis and Goldsmith (2003, p 86) advocate, "if you have the opportunity to choose a physically demanding learning challenge, we encourage you to take the risk..... dramatic physical challenges will teach you everything you need to know about your learning style, and confront you with the assumptions you hold about yourself". I'm not sure what this is about – but good luck with it. Another approach is to distance yourself from this 'story' that you're entangled with and is entangled in your life, and to develop another 'story' that allows you to be more effective. If you're interested in this approach I can recommend an excellent approach developed by Michael White, an Australian narrative therapist

You might also find this an interesting note
<http://www.practicalmagiccoach.com/articles/7ways.html>

In addition, the concepts of Argyris and Schon's (1974, pp 132-133) single and double-loop learning applies to my current 'single-loop' attitude, and the subsequent need to develop the double-loop learning mode. Well I think you are aware of the second loop and the frame that is governing your single loop behaviour – you just need to find ways of reframing situations when this is happening – what Schon calls 'reflection-in-action' Currently I have been continuing in my tried and tested way of dealing with my life, which has not been wholly successful. I have claimed that I do not have the time to review and consider my options. My studies are now giving me the opportunity to learn and challenge my own, and that of my organisation's, limitations and potential. Good...let's work at this!

A really challenging book you might look at that deals with the sense of 'lack' we all experience is by David Loy, Lack and Transcendence, 2000, Humanity Books...but it does make quite tough reading!

4. Part 3 of assignment

Excellence is an art won by training and habituation.

Excellence, then, is not an act, but a habit.

Aristotle

or perhaps an streamlined pattern of performing

Any form of analysis, be it raising my own self-awareness, or receiving feedback from colleagues, is invaluable. Commenting critically on the relative value of the personality questionnaires experienced as part of this course has provided a learning experience of value, as all are tried and tested methods preferred by different establishments.

Awareness of the chronological timelines in the development of the individual instruments has produced an interesting dilemma. The MBTI (Myers-Briggs Type Indicator) was introduced during the 1940s, FIRO B (Fundamental Interpersonal Relations Orientation - Behaviour) in the late 1950s, and Belbin during the late 1970s. I did not fully appreciate this comparative timeline until I started this course, and therefore I am bemused by the fact that I personally consider the relative value of the instruments to be that of the MBTI, FIRO-B, and Belbin, in that order of value, that is, the most useful being the oldest tool. Well what's wrong with that – it's had the longest time to be tested/refined?

I will initially explain the critique from a personal perspective, then place this in terms of other views.

In terms of the MBTI, I obtained an INFP score in 2005 and also in 1996, when I originally undertook this exercise at the beginning of my leadership career as an [REDACTED] Board Director. Knowing the process that I have undertaken professionally during the past nine years, to ensure that I have developed the whole range of skills necessary for effective leadership, I am aware that at the core I am a true INFP so what do you regard as this 'core'?, although this has been a cause for surprise with many of my colleagues,

as it does not appear to mirror my behaviour. Yet I know that my preferred tendency has not changed, even though my skills have developed. This consistency provides me with a level of confidence in the MBTI, which I will acknowledge is subjective. However, from a scientific perspective, the MBTI is the instrument that has received and survived most critical analysis.

The FIRO-B, new to me and therefore of particular interest, provided what I felt were superficial outcomes. The term 'felt' may not prove to be an adequately scientific analysis, but as feelings are a vital element of the course so far, and indeed of leadership, I would hold that my response is valid.

Despite the fact that, as in all the analysis questionnaires, I answered honestly and in a relaxed frame of mind, the outcomes represented my 'façade' and/or 'interactions' with others – so perhaps not quite as 'core' as the preference instruments, rather than my reality, measured more accurately by the MBTI. The FIRO-B result was more acceptable to my work colleagues, who see me as an independent loner, with little need to follow the crowd. How successfully I appear to have fooled them, which is my intention, but how was this identified by a psychometric test? Is it that the test was measuring a different element of my psyche, or did it affect my responses so that I 'behaved' in a work mode without realising it? You filled it in....

I must admit to approaching the Belbin analysis with a certain cynicism. In my experience it is the most commonly used form of questionnaire, and I have answered it so many times that it has become tiresome-the only interesting aspect being that I appear to have collected different responses each time, so that I apparently scan the whole range of team preferences. Although it does have a place in looking at how teams work, and enabling people to have a basic understanding of what preferences they may have at a particular moment in time, I believe that its value has been promoted by sheer marketing-one only has to scan the internet to find the reams of publications demonstrating (and selling) its effectiveness, with little or no dissent. This has not impressed me, as my outcomes in the analysis that I undertook during the course was that my least preferred role was that of the 'Co-ordinator'. In reality, this is a *preference* that I have had all of my life, and take on naturally in teams or groups. how did you manage that then? Is it a learned trait from an early age that has become integral to my conscious behaviour but resented by my unconscious mind, or is the psychometric analysis flawed? I think it just reports what you tell it....would be interesting to see how you managed this; maybe you were just bored, irritated, and non co-operative (I don't really blame you!)

There is not enough emphasis placed on the fact that the outcomes of these tests only relate to tendencies and preferences and not skills, and do not categorise individuals or teams. Yet in many organisations only one of these tests may be used to assign members to particular work teams. There is therefore a necessary health warning that should be provided with these questionnaires. From my experience the Belbin test is the one that is most likely to be misused by inexperienced trainers, quoted as it is, in a variety of management textbooks.

The best analysis of the limitations of these instruments that I have found in exhaustive research is documented by Buchanan and Huczynski (2004,pp339-340).

Here, the key issues are discussed:

- Is self-perception, with its implied trust in the honesty of the respondent, a valid process to assess individuals and/or teams? Certainly it is useful, but the risk lies in *how* the outcomes are utilised. There needs to be discussion, observation and feedback before the tool (and results) can be accepted as valid
- Many of the questions in the tests are vague, repetitive and open to different interpretations. In my opinion, this is a particular issue for FIRO-B, which continually apologises for its repetitiveness. My view was that it was uninteresting to complete, which could result in apathetic responses. (However, this frame of mind may be just what was intended by the originator). Yes you have to be persistent in your preferences!
- There are important differences between *assessing* potential, and the actual *realisation* of that potential. Psychometric tests are very common elements of interview for senior Executives, particularly in the NHS, and there are a multitude of books that develop proficiency in these, alongside the whole interview process. Therefore the high achiever in such tests, may not actually be the right person for the job. Yes this is like interviews - they are not usually used for what they're intended for e.g. getting information
- There is little account taken of the sociological perspective, particularly an important issue in my case, and which would have skewed many of my responses and affected the outcomes. What do you mean by this...do you mean 'context'?
- The concepts of team role and the individual's personality, may become confused and manipulated

I also hold the view that the lack of coursework time given to other personality and psychometric tests, plus the omission of the concept of 'emotional intelligence' this will be dealt with later on developed by Peter Salovey and John D. Mayer (1990) was a shortfall in that it is particularly important in leadership roles, but is also open to challenge and debate. Perhaps it is too modern a concept for consideration? Well it's been around for sometime in one form or another – EI is very much a re-branding exercise So which of these instruments has the most value in my situation in the NHS, where, as Blackler et al (2004) stated, "Politicians have found it convenient to distance themselves from the failure of the system that they control by scapegoating managers...."?

Therefore, the MBTI shows me my *reality*. or your 'preferences'?

FIRO-B shows me how I can *pretend* to behave. or your 'level of interaction' with others?

Belbin shows me how ██████████ (and other bodies) simply like to *categorise* people. or your 'behaviours'?

Do you see any correlations between these different snapshots?

5. Conclusion

Phase 1 of this course has been a revelation to me, and a motivational experience, which has come at a time of personal and professional challenge.

I have learnt that my limitations can also be utilised as strengths, and that I have a 'passion' about my work that draws people to my team or group. Yes this certainly comes through very strongly

I have already started to change some of the behaviour patterns that will enable me to carry out my leadership role more effectively - both inwardly and outwardly, and I know that the support is there for me to continue.

Whatever views I have about the diagnostic instruments used in Phase 1, they have challenged me, causing a reflection on teamwork, and my individual perspective. But the MBTI will always be my home base.

This has been a challenging phase, but I am excited, and inspired to commence Phase 2.

Colleen

This is a very perceptive and frank essay and represents an excellent beginning to your formal work on the programme. You've obviously found this phase of work to be a very useful one in identifying issues that you feel are holding you back. You write very clearly and fluently and show a good deal of insight into the patterns of behaviour that you want to change. And you've identified a range of beliefs and behaviours you want to adapt/change.

I think what you've written here will provide a very good starting point for your own development journey within the MA 'container'. The 'body of knowledge' and its exercises/learning logs/essays, the coaching interchanges, and the variety of discussions with the cohort, will provide you with stimulation and opportunities to work through many cycles of action and reflection during the next six phases of the formal programme, and the subsequent dissertation. These will help you both refine your questions to do with 'how do I improve my practice?' and develop the beliefs and capabilities required to do so.

Well done and good luck with Phase 2!

Phase 6 Essay with KK Comments - February, 2007

1. INTRODUCTION

"He might have become a professional footballer, but the shy man hand-picked from regional management to take temporary charge of ██████████, tells The Guardian why he doesn't want the job"

The Guardian, ██████████

I am looking at the photo accompanying the above article. A kind face, a bespectacled Kermit, albeit wearing a pinstripe suit, looks back.

██████████. My CEO. His office is just down the corridor from me. He took up the role on 1st July ██████████, yet I have never met him or seen him, and neither have the sixty other employees still remaining from my previous organisation before the merger.

██████████, chose to come to us after an Interim post of Chief Executive of ██████████, where he was responsible for ██████████ employees and over ██████████ customers. People who have worked for him previously are either full of admiration, or loathing. In the organisation he is simply ██████████. Or even, 'God'.

Whether human or a deity, he fascinates me, and I need to undertake this assignment to understand why I am intrigued to learn more about the leadership style of a man that I have never seen, who works down the corridor, and who may currently be the best leader ██████████

Like the newsy style – very New Journalism! – and raises my curiosity immediately

2. CONTEXT is this really about 'context', or why you're interested?

Part of the enigma here is that ██████████ seems to be 'outside the box' of leadership theory. I hope you'll say why... He has achieved by being himself, doing it his way and apparently not caring about the consequences. He is not an ██████████ clone. But is he a leader?

It is with this challenge in mind that I approach this assignment with a research methodology involving an exploration of leadership styles, nationally and internationally, focussing on sporting styles with an emphasis on ██████████ passion for football. I have also undertaken twenty ad-hoc interviews What kind of interview approach did you use?; any comments on their usefulness?; talking to staff who have previously worked for him, focussing on his leadership style, and his impact on them. I then look closely at the impact that this exercise has on me, as I anticipate becoming affected by the knowledge and feedback that I receive, which in turn will hopefully give me further insight into leadership.

The dilemma for me is that ██████████:

- Is considered to be a highly effective ██████████ Leader
- Has led organisations to achieve challenging financial and performance targets
- Has ██████████ received other honours for his services to ██████████

However:

- He has a leadership style which does not conform to the styles usually attributed to successful leaders

- *He is rarely visible or available to staff*
- *He has a reputation for being a bully amongst staff*

Could you indicate where these views are coming from – are they yours or do they come from your interviews, or from newspaper reports?

Like me, senior [REDACTED] officials are split on his management style.

“some say that he was a control freak and a bully, while others praise his skill as a talent spotter who was willing to give good people their head. Some say that he was frank to the point of bluntness; others saw him as a great survivor, obeying orders from on high without letting slip what he really thought”

The Guardian. [REDACTED]

And yet again, he is a fanatical football supporter, having missed only three matches of his beloved [REDACTED] football club whilst he was acting CEO of [REDACTED] in [REDACTED]. There is a passionate sportsman lurking there, which provides a clue to his personality traits and will be used in this quest to learn what makes him ‘tick’

3. The Enigma not sure about this ‘numbered points’ style, some in caps some not – a cross between a news story and a report? Better to just use the descriptive headings...and make sure it describes what’s in the tin!

“I have a number of management styles that I use in different situations. I have high expectations and determination. People who deliver usually enjoy working with me; those that don’t rarely do.”

[REDACTED], The Guardian, [REDACTED]

Immediately on the appointment [REDACTED] as CEO to [REDACTED], staff were immediately (repeat) aware of the culture within which they might be working.

A ‘house style document’ was circulated which prescribed, in great detail, the layout of every type of documentation that would be developed. This document was inherited from [REDACTED] previous organisation. It was swiftly followed by a PC toolbar which was set up to ensure that this occurred. Corporate branding. All non-negotiable, all imposed, but certainly effective.

A mantra became commonplace in the corridors. ‘[REDACTED] style’ became the rationale for why, how and when tasks and work programmes were undertaken.

Wouldn’t it be better to do it this way? No, that’s not [REDACTED] style.

Why don't we engage staff by allowing some home working? No, ██████ doesn't agree with that

Why has the meeting venue been transferred at the last minute,? Because it is more convenient for ██████.

To take this further, it is clear that another unwritten rule in surviving working for ██████ is not to question or challenge, whatever you have been asked to do.

A discussion with twenty ██████ staff, who have worked with ██████ within the previous eight years, produced feedback, the best of which could be seen to be supportive of his style. The staff, of which fifteen were men. were brief in their description of that elusive style: "rigid", "dictatorial", "non-negotiable" were frequently used. Five members of staff had witnessed others who had called him "█████" and had been firmly reprimanded. Raven and French's (1958) coercive power base was apparent. People admitted that they didn't feel comfortable talking, one adding "the walls have ears". An unusual interviewing experience leaving me with more non-verbal messages than words.(grammar?) The mood reflected Grint's (2005) 'destructive consent' reflecting punitive environments.

Much of the culture surrounding ██████ has arisen from the staff working around him. Seeds may have been sown by ██████, but the stories and anecdotes are developed by the workers, and there may be an element of myth management here. This would be a clever and effective method of developing a high performing results-driven culture without exposure to staff.. There are documents identifying style and goals, but whilst the ██████ introductory booklet explains that "we will achieve this by being facilitatory..." a colleague was unsuccessful in a job as her style was considered to be "too facilitative and not directive"

There is a mythology developing here, and where there are myths, there are leaders.....but I'm not sure what the 'enigma' is in this section...he comes across as a complete tyrant! (or perhaps as the anti-hero which you move to)

4. Exploring the Anti-Hero

As with all passions, football plays a key part in ██████ working life, and is likely to provide a clue to his philosophy.

Football analogies pepper his speech, did they offer you any?; metaphors do offer a powerful insight into thinking patterns and some detailed analysis of his speeches could be productive. For more on this, see Metaphors We Live By by Lakoff and Johnson, and work done by the Clean Language and Metaphor school of therapy – see <http://www.cleanlanguage.co.uk/> and this is picked up by staff, particularly those that work closely with him. The reference that intrigued me most was that of Sir Alex Ferguson, the legendary manager of Manchester United. In terms of the new ██████ organisational structure, ██████ was heard to state, "With Alex Ferguson, players are only as good as their last match. He doesn't 'carry' people". what kind of metaphor does this conjure up in your mind? This statement in itself was enough to encourage

some staff to look for jobs elsewhere. And it made me decide to look further at the famous football manager's leadership. Were there similarities? Could Sir Alex be a key to what makes █████ tick?

His publicity states that Sir Alex Ferguson worked in the shipyards of the Clyde, and played football earnestly as a young boy, first the youth side of Glasgow Rangers, and then eventually signing up for them on leaving school. His website describes him as:

"...an immovable object.....honest, fierce, driven, obsessive, charming, humorous, stubborn, aggressive..."

It also explains that the reason for Sir Alex' success relate to his personality traits but what weight should you put on his own publicity? , so there is an opportunity to compare this with █████.

The winning traits of Sir Alex would be: who's responsible for this pen picture?

- Personal drive. Sir Alex is said to have an 'obsessive desire to win'. He is a bad loser, and whenever he has achieved a success he never rests.
- Tactics and strategy: His instincts are always seen to be right. Those that underestimate him "always end up with egg on their face".
- Player management and psychology: in the 1999 European Cup final, when Manchester United were 1:0 down, he reportedly said "At the end of this match you will be about six feet from the cup, and you will not be able to even touch it if you lose." Sir Alex is known for being the greatest motivator in European football.
- He is the "master of mind games".
- He can be utterly ruthless

His website concludes with a quote from the philosopher Machiavelli:

"It is better to be feared than loved".

This is interesting stuff but just how valid do you think it is? Aren't there articles/biographies that might cast further light on this man's style and some analysis of the influence on success? Is this enough on which to base a comparison?

There is a very familiar thread running through this .The much quoted Guardian interview revealed █████ as a sports enthusiast driven by a strong work ethic since he joined █████ as a teenager straight out of grammar school. Brought up in a █████ council house, he represented the county at football, cricket and rugby. In the school holidays, he trained with the full-time professionals at █████ United. "The club offered him a playing contract but his father ...put his foot down...schoolwork should come first and a proper job later". In terms of the █████ was quoted as saying..."Whatever is done is not quite good enough. You can always do better. So my thirst for learning is as strong now as when I came into the █████ at 18". (source of quote?)

So we are getting closer to the heart of █████. Fired by a work ethic, determination and an obsessive desire to win and improve, it may not be the public sector but from his favourite sport that he draws inspiration. and his approach to how to lead effectively?

Exploring the realms of football leadership may determine if there are transferable skills ...

5. Football as a leadership inspiration

Chelladurai (1990) stresses the 'importance' of specific rather than general theories of leadership could you say more about this: importance in what way and to whom?, and noted the limited investigations involving football managers. The Leadership Scale for Sports, developed by Chelladurai and Saleh (1978) has received extensive testing, and there are a number of replicable research findings. As athletes mature and grow older, they have a greater preference for a more autocratic style of leadership, perhaps as they become more serious and goal-orientated. Although there are more similarities than differences in the preferred leadership behaviours of sportsmen and women, there is some evidence that men prefer more instructive behaviours and an autocratic style of leadership. Chelladurai and Doherty (1998) note that more autocratic styles dominate in football where larger squads are involved, and also that democratic styles are less effective for complex problems and are more time-consuming. 'less effective and more time consuming' in what complex problems...football or generally?

In sports specific research, Clough, Earle and Sewell (2002), identified that hardiness and mental toughness correlate with the performance of endurance tasks, and resilient personality traits. Not sure how this follows/connects....?

There is still much work to be undertaken in terms of sports, and particularly football leadership are you saying this or do you have a source you can quote?, but there are some useful analogies here in terms of ██████████ and particularly, ██████████ leadership. If ██████████ is perceived as a football team (albeit rather large one) this is a bit of a stretch not only in terms of size but also purpose and complexity of task!, then there is certainly an autocratic feel to it, and there is no consultation with staff. isn't the logic the other way: there's no consultation/an autocratic feel – so possibly ██████████ thinks about his organisation as a football team? This may negatively affect staff in some ways, but would also prevent the moans of time-wasting and cynicism that occurs when views are invited. Is this why Sir Alex uses this style – to stop his very well paid stars cynically moaning about 'time wasting'? Thus avoiding a Catch-22.(grammar?)

At this point, I feel comfortable that there is a model against which I can now understand ██████████ more effectively. Good but it would help me to follow your argument if you were much clearer about this 'model' of football leadership (last year Bobby Watkins had a rather different model to offer – see his dissertation) Analysing him apart from the classical leadership mode I would have thought the classic autocratic 'great man' model would fit very well here? makes his behaviour more understandable, but for me it still doesn't make it acceptable. This now feels like you're moving into a new section, turning from 'football as source of inspiration' to the impacts of this style on the organisation...? (or as you go on, on your self) Whilst writing this I am also part of his organisation that is undergoing change, with 150 of us who have not found jobs still coming to work, although our work is drying up. I have witnessed tears, anger and frustration. People who are experienced, willing, and desperately want to work are being ignored and feel useless and, yes, redundant. I watch this and I too feel angry.

The term 'Machiavellian' is often used derogatively, but as I return to read of his writing I am reminded that his whole approach is about? practicality. He may have held that public success and private morality are separate, and he shared with other

humanists a general pessimism about human nature, but my dilemma is that when I initially studied him I warmed to Machiavelli – his pragmatism, his analysis of leadership qualities, and his advice re choice of advisors. So why do I resent using his work as another tool to understanding [REDACTED]? Because it may mean that I would warm to [REDACTED]? Well this certainly looks like a good question to pursue now – what you've said so far has certainly not encouraged me to warm to him!

It was at this point that the reason for the blocks that I was experiencing in this assignment became clear.

6.Woman –see thyself

I was initially enthused to undertake this assignment because [REDACTED] fascinated me – the man who appeared to be idolised by whom in [REDACTED] and yet was, in my reality, destroying it, or at least the [REDACTED] counties that he is responsible for. He is neither charismatic nor empowering, inclusive or even visible, but he is effective, and he has survived as [REDACTED] CEO for several years. ..so this is the enigma then!

Finding an equal in terms of style and effectiveness, albeit to greater celebrity, in that of Sir Alex Ferguson was disconcerting. Suddenly [REDACTED] could be seen as using his passion - football, to fuel his work or how to lead effectively Perhaps even using Sir Alex as a role model. Normal and appropriate behaviour and, in his case, effective. (grammar?) Whether he also used Machiavellian principles by chance or intentionally is unimportant, as they appear to be used without malice. You've not yet said much about this possible link part from saying you felt reluctant to use it ..?

So what is the problem? I am surprised to learn that it is my attitude. I *wanted* to uncover a monster, to find that his treatment of colleagues has been cruel, inappropriate and that his leadership is at fault. I was 'colluding' or less negatively, perhaps just agreeing with colleagues who ranted at [REDACTED] apparently callous behaviour to his staff.

But I was wrong...this feels like a bit of a lurch... [REDACTED] was not doing anything to staff – they were failing to take responsibility for their own careers...and quite a re-frame! And although I feel that I am doing all that I can, at difficult times it is [REDACTED] that I blame. Unfairly, I now realise. Hmnn, possibly... Like Hesse's Narcissus and Goldmund, I was coming to the realisation that through my studies and reading, I was beginning to construct theories of what was appropriate behaviour and leadership for this situation.(reference? And for the non classical reader like myself, just what did N and G realise?) And if I had been the leader, or somebody I respected was, they could not have changed the fact that with the merger and [REDACTED] cost savings required, people would still be made redundant. And at some point those people would have to take responsibility for themselves.

[REDACTED], like Goldmund, was just doing what he had to do. do you mean like the Nazis having to do what they had to do – or is there another meaning here? I don't have to agree with how he does it to make him a better or lesser leader. well, yes - but you can have a view on how he did it, and whether or not it could have been done more effectively, as can your colleagues. And from what you've said so far, he hasn't done it at all well.

So now I am left with a deconstructed theory, I can see that you've been able to see that it might be unhelpful to just blame [REDACTED] for his style of doing things, and to take some responsibility in all this for your career – is this what you mean by 'deconstructing' your previous theory-in-action? and the realisation that I need to reconsider where I am in my leadership journey. And I sense that this fork in the road is now the one that I need to travel,

7. Athena becomes Artemis

In previous years I have used the Goddess archetype psychology of women espoused by Bolen (1985) and the Woolgers (1990) as a marker for personal and professional development.

The characteristics of the Athena woman appeared natural to me – I was confident, practical and intelligent, with a passionate desire to change the system. I found working at a high level stimulating, and relished the rewards that it brought me.

I am changing, and I have probably spent the last two years resenting and denying that occurrence. If we looked through your logs over past 18 months would we see signs of this change and its denial? Could provide an interesting thread in your dissertation....As I mature, and my children become more independent, a reassessment uncovers Artemis characteristics, and a shift is occurring in my psyche that is reflected by Bolen's work – I am becoming more reflective, journeying inwards and looking towards other interests, as there are few uncharted wildernesses in [REDACTED] that I am inspired to explore. And it shocked me to recognise myself in Bolen's words...

".... lack of mercy often arises when an Artemis woman judges the actions of others in terms of unmitigated black and white. In this perspective, not only is an action either all bad or all good, but the person who does such a thing is too. Thus an Artemis woman feels justified if she retaliates or punishes."

As I uncover the fact that the premise of this assignment related to my view that [REDACTED] leadership style conflicted with traditional and modernist leadership theories, I realise that my bitterness and anger, which had developed amongst an environment of recruitment rounds, extensive travelling, competition and humiliation, had no outlet, as whatever happened, I was determined to be positive and professional. That bitterness related to the years of perceived sacrifice, (both mine and my children's), commitment and dedication. Surely that deserved reward? Respect at the very least?

Now I have become just that angry, arrogant, cynical, impatient individual that I so despise. Or perhaps this possibly 'shadowy' aspect of your potential self(ves) has been particularly stimulated in the recent past? And another fork in the road takes me on the path to my former beliefs...what - of an Athena orientated self?

Back in the early '90s, when I first started exploring the Goddess archetype, I was also developing my values system in [REDACTED]. It was vital to me that I developed a holistic set of principles that incorporated different aspects of my lifestyle. Bringing up three small children on my own and juggling a full-time career meant that over time some of my good intentions became eroded, as the fact that I was noticed to have leadership potential meant that I had to make choices. I was seduced into a lucrative and pressurised career because I 'could', not because I necessarily 'wanted'. What was worse, this was the second time in my life that I had made such a choice, having

previously left an extremely lucrative marketing role to escape the rat race. I am aware, and regret the fact, that I compromised my personal beliefs for financial gain, and for fear that I was becoming a feminist cliché.

It's not clear to me how your 'transitional' goddess metaphor, as I understand it, informs this section. Are you saying that your Athena like stance, developed in the early 90's, 'softened you up' enough to be seduced by the attractions of career and lucre...that this created tensions in you which you've resented but denied...and that as a result, your judgements of [REDACTED] have been clouded by unconscious projections of these feelings onto him and his kind...which seem to be more Artemis-like in character?

8. Regaining the Passion

“You must be the change you wish to see in the world”.

Mohandas Gandhi

It feels appropriate to start this final paragraph of discovery with a quote from one of my most admired individuals.('2006'). what does this incomplete reference refer to? As I am reawaken my past persona, do you mean Athena like? I am also ready to develop the links between Western and Eastern cultures that were touched upon in phase 6, and to use a critical gender lens to examine how I can develop my unique brand of leadership.

I have for some time been struggling with a dual what's 'dual' about it? relationship between feminine and masculine personality traits such as empathy and toughness respectively, as discussed by Binns, (2005) . Whilst I was achieving coaching qualifications and leading on challenging projects, [REDACTED] has left me in no doubt as to the relative importance as perceived by my organisation, and that it elevates toughness but not empathy or other such 'soft' traits. I am left in “no 'man's' land” irony?

There is a requirement for me to regain Hegelson's (1990) notion of embracing my femininity as a superior way of being in the world, and of turning that difference into female advantage. Would be worth saying a bit more about this 'notion' here, as it seems to be a key one for you

A photo published in the local paper when I was speaking at a conference in the '90s was entitled “Colleen – Passionate”. This caused some amusement in the office, but it came to mind on reading Hatcher (2003) who reflects that the traditional masculine/feminine hierarchy is it a hierarchy or tension of logic and emotion is being shaped by the imperative to be passionate in the workplace. Where is this 'imperative' coming from? Can I regain that? [REDACTED] may be passionate about football, but this is not evident in his leadership style, and I would feel inhibited in his regime. Being inspired by Foucault's 1982 role of “showing people that they are much freer than they feel” (source of quote?: how did he show this?), further enhances the journey that I can take, rather than rot in the dead end where I find myself now.

My original enquiry related to the source of [REDACTED] motivation and style. True to Hawthorn (reference?), the very act of studying motivation has made me rediscover my own, at a time when I was at most danger of compromising myself by looking at what I *should* do is this the Athena idea, or..rather than what I want to do....or is this the Athena idea?

██████ may be a good leader or he may be a super ‘manager’ doing what he’s told to do without much doubt or question?, but in my view he is not a great one. But I do owe him thanks for initiating this journey. I may even quote him at some point, but I will be adapting his words to reflect my leadership style:

“I have a number of management styles that I use in different situations. I have high expectations and determination. People who deliver usually enjoy working with me; those that don’t **learn how**” a nice touch!

Colleen

I enjoyed reading this. You’ve tackled a difficult topic in an innovative way, and transformed the story of ██████ convincingly into a story of your own learning about who you are and what you want to do. Your story has passion, personal insight and ranges over a diverse set of literatures, from football managers to goddesses. You also make good use of the learning log work you’ve done and your log submission with its accompanying linking narrative raises the quality of this piece of work. You also employ various rhetorical devices such as metaphor/direct quotes and makes what I think is a creditable start on what might be termed a New Journalism style of writing (more on this later). So well done – just what the MA ‘doctor’ had in mind for these essays!

I did however find it quite a difficult argument to follow at times, having trouble with the logic and continuity of the story in various places, especially on the second read. I suspect some of this may be due to a possible habit of offering interesting quotes from time to time but with very little explanation or unpacking of what they mean to you and how they link up and strengthen your argument. Sometimes it’s better not to assume the reader can make the intuitive jumps that you’ve made, but to slow things down and lay it out a little more linearly. I get a sense that it would have been a lot smoother if you’d had time to do it all over again, but ‘reading’ it as a stranger – you’d have seen the gaps and possible confusions more easily

I think you’ve been brave and enterprising in this paper, tackling a difficult topic, trying out a new way of writing, exploring new fields of knowledge i.e. football, bringing in other fields that you’ve been interested in before i.e. goddess models, and digging deep to create a parallel story about your own development. This has been good preparation for the dissertation phase where you will have more time to work in this more personal and creative way.

As a prelude/accompaniment to the work of Phase 7 I’d recommend that you delve more into the New Journalism approach to ethnography to see if this continues to attract, and to do some preliminary reading in the ethnography field itself – I think you may find that this will play to your particular strengths when you tackle the dissertation. To get started you might dip into Interpretive Ethnography by Norman K Denzin looking particularly at his comments about New Journalism and Narratives of the Self – I think you may be in a position to combine first person and second person qualitative work to create a powerful narrative about ‘leading in difficult times’.

Keith

APPENDIX 4B

Edited transcript of Colleen's course evaluations after Phase 3 and Phase 4

Subject: Phase 3 Evaluation – Colleen

1. How do you rate Web based materials/facilities like Learning Log and Forums? 2

I think that this phase has visibly reduced communication amongst participants, except perhaps those who were on the exchange. Some time ago we spent time discussing the role of the Discussion Forum at Exeter, and agreed that it could be used differently. This does not appear to be happening. The Exchange, whilst being a tremendous experience, has possibly created a sub-culture in the group... We really need to discuss the use of the Discussion Forum!

2. How well does written assignment/associated feedback contribute to your learning? 4

I have handed in my assignment, and I know from previous experience that the feedback that I get from my tutor will be valuable, challenging, and add to my learning. But although we were rightly not given a direction for the structure of the assignment, I focussed mine very much on my experiences and reactions to the differing cultures and individuals in the Exchange... So I am intrigued as to whether I will be penalised for doing what I felt was important for my learning and reflective practice, rather than tailoring it, as I could have, to an academic treatise. Whatever my outcome-I know that the feedback will also be the learning!

3. How well does mix of web based guided learning and private study work for you? 3

The discussion forum I have already mentioned-it is not really working... But I find the whole web-based learning experience extremely valuable. I have the time to reflect, and experience, rather than having to take frantic notes as in a lecture. I am alone so the private study suits me fine! The assignments are valuable. I have learnt how lucky I am to have an excellent tutor, who challenges me, provides excellent feedback, and is extremely supportive. I do not feel that this is everybody's experience, as some of the feedback/support received is minimal

4. How easily are you able to access the on-line documents & books that you need? 4

On-line-no probs. Difficult because of time constraints to access all of the reading that I would like to, as there are so many excellent references given, but not all are of equal quality/usefulness

5. How consistently are you able to access the web material whenever you need to 4

Yes and usually it is working. If I have probs, I find that it works the next time I log on

6. How well does the tutor support work and does it meet your needs? 5

Excellent - I couldn't have a better tutor than Keith: he seems to know exactly what I need!

7. How well does the course administration work and does it meet your needs? 5

Feel that it works well, and meets my needs. Sue is very rapid in her responses

8. How highly do you rate the curriculum in terms of its relevance to your needs? 5

At the moment, it is spot on because as the [redacted] is going through a re-organisation, culture, strategy etc are key issues, so that I really can relate the theory to the reality on a daily basis.

9. *To what extent have your Learning Outcomes been achieved?* 5
They have been achieved because they are the 'mission statement' for my approach to each task that I undertake. They are like the targets that I need to achieve, so I strive to ensure that it happens

Subject: Phase 4 Evaluation – Colleen

1. *How do you rate Web based materials/facilities like Learning Logs/Forums?* 3
The tutors have tried so hard but am I alone in thinking that we haven't 'cracked' the Discussion Forum yet??? I feel responsible...we have talked so much about this in sessions but then go back to previous behaviours...a change model in action! I feel disappointed (would have put 1 on this); the Learning Log brought it up to a 3. **If the Learning Log was marked alone I would make it 5. My tutor is so challenging, so wise and gives me so much material to work on that I feel continually supported and blessed that I was lucky enough to be assigned to him!!**

2. *How well does written assignment/associated feedback contribute to learning?* 4
See above. **Challenging material and challenging responses. Sometimes, I feel that the assignment is too easy, but the response from my tutor to my work becomes the real assignment!**

3. *How well does mix of web based guided learning and private study work?* 4
See above. **But I think that it is my tutor that is the fulcrum.** Not all feel the same as me. Changes...similar access as I have to high-quality tutors! **Here I'm reminded of Alan Rayner's You Tube demonstration of inclusionality and his description of the 'fold' in the sheet of paper as the dynamic boundary pivot or *fulcrum* that reciprocally mediates the relations and identities of the two 'local neighbourhoods'. Is this the role I'm playing in mediating the learning interchanges between Colleen's tacit knowledge and world of work and the more propositional world of academic knowledge and study?**

4. *How easily can you access the on-line documents & articles that you need?* 4
Not all can be printed out (some diagrams/charts etc) but it is manageable

5. *How consistently are you able to access the web material whenever you need to?* 4
Most of the time. Some problems with Learning Log access but unsure which end the problem lies!

6. *How well does tutor support work and does it meet your needs?* 5
11 out of 5!!

7. *How well does the course administration work and does it meet your needs?* 5
High standards...but I don't think I have had to call on it too much...

8. *How highly would you rate the curriculum in terms of its relevance to your needs* 5
I am living this curriculum!!!!

9. *To what extent have your Learning Outcomes been achieved?* 4
Very helpful, particularly as my tutor has an intuitive response to directing me to papers/issues that will challenge me further!!

APPENDIX 5

Ian's 'reflexive biography: extracts from and comments on Ian's dissertation

From the Abstract

This paper aims to demonstrate the change in my leadership practices by offering and analysing 'snap shots' of critical incidents at different times, during a four year period while I was trying to get a Continuous Improvement programme implemented at [REDACTED] where I work. It charts how I went from one method of leading to another, highlighting the issues I faced and how I dealt with them, and the changes that I occurred in my thinking through the practical application of leadership theory obtained as part of the MA programme at Exeter University.

Reflexive analysis has been used to be able to make sense of some of the changes that have occurred in my thinking. I have been able to tease out what my values beliefs and assumptions were and how these have changed through the study period, effecting my perceptions of the world in which I operate and the judgements I make. I have moved from "*my view, my priorities*", to a more of an "*our view and our priorities*". This shift in thinking seems to sit better with me and within the organisation I work for.

So here at the very outset of his dissertation Ian is aiming 'to demonstrate the change in my leadership practice' over a period of some 4 years, particularly identifying the influences on his thinking 'through the practical application of leadership theory' learned during the MA programme. Further, he indicates that through 'reflexive analysis' he has been able to 'tease out' changes in his 'values, beliefs, and assumptions' and the effect on his perceptions and judgments, leading to a stance which moves him from self-absorption to favour '*our view and our priorities*'. These statements in my view clearly show that he believes he has been able to make a significant move in his leadership approach/style through changes in the way he looks at and behaves in the world influenced by the embodied application of ideas learned and support provided at Exeter. Though he doesn't specifically mention e.g. 'primitive reactions' and 'language-games' which are part of my way of understanding the situation, something of this nature seems to have occurred. We'll see more detail as we look at other excerpts from the dissertation

Pp 9-10

I feel that I have grown in competence and maturity since joining the company and that this has been aided by undertaking the company sponsored MA Leadership programme at Exeter. The different roles in the organisation and useful insights into "*me*" gained on the programme have enabled me to evolve. I have discovered (particularly in phases 5 and 6) that by reflecting on past events with my newly acquired lenses developed on the MA programme, I can obtain new perspectives on old events that help me understand the present in new and more fruitful ways, and consequently act in ways that improves my performance as a leader. Wolfe (1993:32 in Smith 2001, page 33) helps me understand this with: "*Know thy self*" was an inscription over the Oracle of Delphi: *unless leaders know their own strengths and weaknesses, know what they want to do, and why they want to do it, they cannot succeed in any but the most superficial sense*"

So here Ian is speaking directly to the idea of new language-games – new ways of knowing how to go on with others – which allow him to 'understand the present in new and more fruitful ways'

P 12

So my essentially 'first person' reflections on the 'what happened and why' of a series of critical incidents (Crisp *et al*, 2005,) will be challenged and enriched by the views of others who were also there. In doing this I will use a narrative approach to develop two 'landscapes' – one on the 'actions' and a second on the 'meanings/consciousness' associated with these facts (White, 2005) to show three levels of influence (Whitehead and McNiff, 2006) :

- The influence these events have had on myself, my learning and my method of learning
- How I have influenced others
- The influence I have had on the formation of the social context, the new ways of working I have brought into the organization.

These sentences refer specifically to ideas I'd offered Ian during the mid part of the programme – the first coming from Michael White's narrative therapy, and the second from Jack Whitehead's views on educational influence. Though he'd not acknowledged these ideas specifically in his learning logs at the time, they clearly did connect and he's now connecting them and using them to help frame his dissertation. I'd offered both of these ideas – which are not in the formal leadership syllabus - in response to his experiences and views at the time, and are an example of the way coaches can both tailor and enrich the learning pathways of each student in a dynamic and timely manner.

p 15

The concept has been developed by Tripp (1993) as a development tool, who explains them as:

"The vast majority of critical incidents, however, are not at all dramatic or obvious: they are straightforward accounts of very commonplace events that occur in routine professional practice which are critical in the rather different sense that they are indicative of underlying trends, motives and structures. These incidents appear to be 'typical' rather than 'critical' at first sight, but are rendered critical through analysis." (Tripp, 1993: 24-25, In Crisp, *et al*, 2005, page 6)

Footnote on p 16, diagram on p 17

7 "What is critically reflexive practice and why is it important to management education?... In practical terms, this means examining critically the assumptions underlying our actions, the impact of those actions, and from a broader perspective, what passes as good management practice" (Cunliffe, 2004, page 407)

Other examples of him taking an idea I've offered and making it his own appear firstly on p 16 where he uses Tripp's approach to 'critical incidents' (Tripp, 1993) as the primary means through which he will tell his story; and in the diagram on p 17 where he uses a modified diagram originally provided by Ann Cunliffe (Cunliffe 2004) to act as the visual framework for his pithy progress summaries at the end of each critical incident

P 18

Using the ideas of narrative inquiry, I will be able to engage in several re-tellings of the earlier telling of my story of an incident. In doing this, theoretical views will be pulled into the study to make sense of the situations, very much in the manner of inductive action research (Winter, 1989), rather than used to frame the collection of data in more deductive studies.

So here is another reference that was offered in response to his work, this time to the practice in action research of ‘pulling in’ research articles as indicated by emerging issues, rather than doing a full literature search up front.

P 19

Loose Structure of the Analysis

Once the story was told, it has been analysed using the following questions, plus other relevant to the specific issues that the story has identified:

1. What contextual factors affected my view?
2. What effect did I have/might I have had on the situation, both consciously and unconsciously – and what evidence do I point to in order support my reasoning?
3. Why did I see things as I did – what assumptions/beliefs/concerns dominated my thinking at the time?
4. What were my ‘operating’ values at the time?
5. What effect on my thinking have the views of others present had?
6. What does leadership theory offer to help me make sense of the incident?
7. What have I learnt from looking at this incident again

P 22

Although asking others of their view of the situation has given some balance to this view, my positional authority (or the fact the interviewees do not want to offend me) may give rise to me getting told what I want to hear, or what they think I want to hear. In addition I may use my relationships with the staff being interviewed to manipulate the answers (Kvale, 2006).

Another reference here that is out-with the syllabus, offered in response to my concern that he might be underestimating the nature of bias he could be subject to if he approached interviews as just a straightforward response to his questions

Pp 24-25

Herr and Anderson (2005) have proposed five validity criteria for this type of research, I have tested my study on them and the findings are below in Table 2.

Another reference here that is outwith the syllabus that he has picked up and run with

Pp 29-33

■ found me driven, demanding and impatient “*I wanted results and I wanted them quick*” (Appendix C4). He was not totally against this style as it had given the team focus. He went on to say that when I have had enough of what someone is saying in a meeting I can “*Cut someone dead*” (Appendix C4.) which is something I still do...Finally, ■ gave some candid feedback on my leadership style back then, saying I took over, and drove things. I was aiming to lead from the front, setting the pace and trying to improve things. The comment relating to my style of leadership being “*bound to piss a few people off*” (Appendix C8) would not have bothered me one bit back then, I was focussed on “*getting the job done*”

I had not started studying leadership at the time of this first vignette, but I had just completed an MBA. I feel this had drawn me to the process of the mechanics of business rather than the people. I was using KPI’s to drive performance, rather than looking at ways of motivating people. I think consciously I believed that the process I was trying to introduce could have a positive effect and bring order and structure to site

improvements. However, the manner in which I acted in the meetings (and in between them) may have stifled contributions, and could even have been a source of resentment. I was taking over and not even letting the professional consultant steer the group.

My view of leaders at that time was of people who took control, pressed on with ideas and did not get too bothered if they upset people as long as the job got done... My training as a fitter (and engineer) had taught me to value structure and logic and my education and experience in the world of management had taught me to value systems and processes in getting things done. A lack of understanding of situational leadership may have meant I acted inappropriately in the context of a project group. To expand, maybe I was treating a complicated issue as a simple problem and acting accordingly, rather than judging the situation as a more complicated project that required a more involving, patient approach, or in the words of Snowden and Boone (2007, page 76,): “... leaders often will be called upon to act against their instincts. They will need to know when to share power and when to wield it alone, when to look to the wisdom of the group and when to take their own counsel” It seems that my preferred leadership style back at the time of the Critical Incident was to be directing proceedings and in total control of the situation. I would suggest that back then my idea of team work was getting a group together in order to push forward the way I wanted things to happen. I closed people down, and in doing so shut down the possibility of good ideas (for example letting the ■ crack on with some quick wins).

These comments were made during the period 2003-6 and serve as a datum point for changes in Ian’s style after he joined the MA. Clearly at this point in his development trajectory, he believed firmly in taking charge and driving action forward without much concern for the relational aspects of what he was doing.

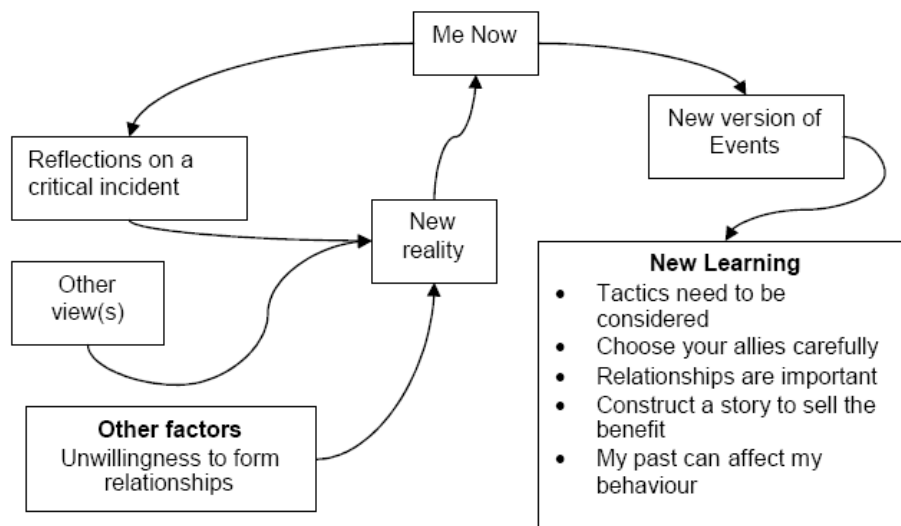
P 34

The work of Elliot Jacques (in Wade, 2004) offers a useful theory to interpret my issues at the time. He puts forward that there are different levels of task complexity, from very simple to manipulation of whole complex systems. The ability to understand these is related to the time span you are used to operating within. I was used to more day to day issues (needing straight forward practical judgements) and with the project in the critical incident I may have been operating within a ‘*time span of discretion*’ that required more of a “*find the data a you go approach*” (Ibid, page 4)

These comments regarding Jacques work, as well as those he will later offer from Torbert, both address the idea of there being ‘levels’ of ability that enable some people to tackle work in more sophisticated ways than others. I offered these when I saw how interested he was in Grint’s and Snowdon and Boone’s ideas for providing leadership that suited different kinds of ‘context’, as they seemed likely to give him more to work on.

P 44

Figure 3 – The reviewing cycle for chapter 4



It can be seen in Figure 3 that through reviewing this cycle of work I have identified some key learning aspects. Firstly, I had not understood the importance of tactics on getting my proposal taken on board; naively thinking the benefits would be easily understood. Secondly, my bedfellow in the proposal had a chequered history with this type of initiative. Thirdly, in analysing the incident, I have realised that at this time I may have still been carrying some baggage from my previous place of employment, which was getting in the way of a willingness by me to form working relationships. Finally, I have since come to realise that relationships are important, especially if you do not have positional power as they can be used to help construct a story to sell the benefit of a proposal. As Grint (2000) points out in order to capture the followers the leader must be able to motivate them past what he can push them to do, they must want to do it.

This CI occurred just before Ian started the MA. It's clear that he still was holding to his 'unreconstructed' views despite having a promotion and having completed an MBA. In this commentary he is beginning to have second thoughts about the viability of such an approach but we have to wait until the next CI which occurs 9 months after he had started and had completed the first three phases of the MA, for something more tangible to emerge.

P 48-51

I had undergone some intensive self reflection and analysis of my behaviour from the September of 2008 up until the time of the incident. In addition, I had investigated different leadership theories. This had changed the way I reacted in my dealings with people, both in groups and at an individual level. In phase 3 I had observed a different leader (and him me) and through this process I had begun to understand that keeping quiet, listening and seeing things from others peoples perspective could lead to better outcomes.

I was willing to see past my own frustration to the larger objective of being part of implementing a C.I. programme within the organisation. If I'd have kicked back or argued with ■■■ at this point I may have put my involvement in jeopardy. I felt that by being positive and helpful, it put me in the best position to influence how the programme was going to be rolled out. This was a definite change of tactics from the cases in the preceding chapters.

I felt that I could be part of transforming the organisation, and for this reason I chose not to be honest about my feelings, which only 12 months before, I would have expressed clearly and possibly aggressively. I think by modifying my behaviour I had a positive affect on the relationship with [REDACTED] and the beginnings of a C.I. programme. However, I think not being true to my inner frustrations had an unconscious negative side effect. I started to look for other jobs outside [REDACTED] and began to resent [REDACTED], seeing negatives in our interactions. I suppressed them as with the critical incident, and started a self-feeding issue for me. To expand, the more I was not honest with [REDACTED] and played the happy soldier, the more I felt inwardly frustrated... The MA in leadership was having a very positive impact on me, I had learned to adapt from the brash ‘do it my way’ manager of the year before, but was unable to deal with my frustrations in a constructive way, choosing to suppress them rather than discuss them.

Here the adoption of a new language-game of ‘being positive and helpful’ rather than ‘close people down/do it my way’, takes Ian forward in one respect but immediately reveals another ‘competing commitment’ (Kegan and Lahey, 2001) – his need to be ‘true to his inner feelings’. Finding a way of dealing with this dilemma is to pre-occupy him for some months to come.

Although I had made some progress I was not the finished article (you could argue whoever is) I was awash with new tools and theories I was reading about that I was trying to use to deal with situations, that maybe I was not as proficient as I could be: *“...cognitive learning no more makes a manager than it does a swimmer. The latter will drown the first time she jumps into the water if her coach never takes her out of the lecture hall, gets her wet, and gives her feedback on her performance...we are taught skill through practice, plus feedback, whether in a real or a simulated situation”* (Mintzberg, 1975, in the best of HBR 1998 ,page 26)

The quote by Mintzberg is telling us that competence comes through practice and then feedback, to which I totally agree, and see the problem here as: I was practicing in real life situations, but I did not have the feedback or all the tools to make good use of this. Another explanation could be I was moving from single loop learning and at the beginning to practice Double Loop learning (Cunliffe, 2004*) through the challenges being made to my long held assumptions as a student on the leadership programme. (**“Students also find Argyris’s [1982, 1991] distinction between single- and double-loop learning useful and often refer back to his 1991 article throughout the course. They readily identify single-loop learning as reflective (problem solving, identifying, and correcting errors) and begin to think about double -loop learning (thinking more critically about behavior; questioning assumptions, values, and espoused theories; disconfirming, inventing, producing, and evaluating new theories in action) as the beginning of critical reflexivity”* (Cunliffe, 2004,page 412).

Figure 4 demonstrates that in reviewing this cycle of work a shift in attitude is apparent when compared to the two preceding chapters. I had began to think tactically, seeing that a confrontation would not achieve anything in terms of being involved in the initiative. I was thinking past what I wanted and how I saw things, and although internally aggravated, I demonstrated positive supporting behaviour. I was now thinking in terms of outcomes, even when I was fighting with some internal issues that I did not know how to express. I was agreeing to one course of action (or espoused theory), while thinking tactically what I was going to actually do (my theory in action); I may have

been beginning of double loop learning, yet I clearly had to develop some further methods of dealing with these types of situations.

What is becoming evident in Ian's writing now is that he is beginning to use further ideas contained in the Cunliffe article I had forwarded to him – this time 'single and double loop' learning. This illustrates how the path of learning is always dictated by the student's issues and interests: this concept had been mentioned earlier in the formal syllabus but it is now, as Ian struggles to make sense of his future intentions and his present behaviour, that the concept catches his eye, and this time from another source.

The next extract happens while Ian is doing the Phase 5 coaching module ('which heavily influenced me') and is promoted to Operations Director a much mores senior role.

P 55

Regarding my role he felt that I made a real effort to listen to everyone. At the beginning it seemed I was not leading at all, but as the process progressed he could see that I did have an agenda as I steered the group to look at specific elements on the site. He felt this was fine, in that, if we had not had some clear issues to look at, we would not have had anything substantial to hang the training on to. He added that he was very impressed that later on (in Jan 2010) when the group had professional training on C.I. tools, the trainer could only refine the methods I had brought to the table. This has given me more credibility in ■■■'s eyes. Regarding my leadership style: "*■■■ felt I went out of my way to demonstrate the behaviours that I felt the group should demonstrate. I led by example, I listened, I contributed, and I was enthusiastic. He said my attitude towards the programme was infectious*" (Appendix K6).

P 57-60

Using the learning and reflection I had been going through as part of my studies, I came to the conclusion that I needed to change the way I behaved in some situations... I wanted to be seen as a team member rather than the leader, wanting to harness the power of the group and enthuse the team rather than roll out my interpretation business. Finally, to initiate the different ideas from different people taking the organisation in the required direction of what we should do... By using solution focussed coaching, listening, reframing and asking appropriate questions and adapting my position to the answers, I created a climate of respect and mutual trust. People like to be listened to and if they feel they are, reciprocate. Good questions seemed to be a better way of steering a group rather than statements of views/intent.

An appreciation of matching style to context is something that I had picked up on early in the MA in leadership; however I was struggling to find an appropriate tool to let me gauge it, and therefore allow me to adapt my leadership style. I found the asking of several questions and really listening to the answers has served me well in being able to gain the information I needed to 'read' the context and to adjust and pitch my responses in a way that either matches the context of the situation, or if I feel it necessary, to reframe the context and then behave in line with that reframing.

What is recalled within this chapter is very different from the first attempt at implementing a ■■■ programme...it can be seen that a shift in leadership style that came about directly from applying the knowledge gained from the MA. I took that knowledge and experimented with it. Reflecting back has made me realize that I was open to try something new given the failure to get people on board before. The change of tactics in

terms of listening, reframing and 're-setting' the context, involved building trust and jointly taking things forward as a group. Reflexively speaking, the [REDACTED] Pilot is a defining 'moment' in this study: it seems that up to this point my changes in behaviour had been incremental and maybe invisible to others: to me this is when the new more participative, contextually aware 'Ian Richards' arrived!

As Ian indicates here, he connected to the idea of matching style to context in a dynamic manner quite early on in the programme. This first primitive 'reaction' *began* the process of developing a new language-game but it was not yet enough to get him over a tipping point - more detailed tacit work/'indwelling' was required. In Phase 5, through studying the tools of coaching and then applying them in practice sessions and live in critical work meetings, Ian achieves a breakthrough and shows here that he has made a significant shift in how he offers leadership to his people. He has now clearly been able to move from a 'do it my way' brusque and direct style to a much more engaging 'let's work together creatively on the issue' approach. This provides a good example of how the further elaboration and development of a language-game through 'indwelling' activity, can allow someone to both see and behave in a more context influenced manner in how he/she goes on with others, to achieve better outcomes.

The next and final example/CI happens during the summer of 2010 while Ian is working on his dissertation

P 66-68

When I read the comments about team work and support and compare them to (earlier) remarks, I can see that I have developed a different style. Certainly in my interactions with my peers at [REDACTED], I seem to be listening more, being more supportive and participative, and I am willing to take a back seat, and be more of a team player or lead by supporting from behind. [REDACTED]'s comments about the non-confrontational way I make my points seem to back up that there has been a shift in style.

All these outwardly positive attributes (from my perspective anyway) seem to still be having an internal battle with the 'old me'. It seems that I picked up and reflected on a Critical Incident that to others was not critical at all. Is there a conscious versus unconscious battle occurring within me? There is the old me who wants to lead everything, who likes power and wants the Kudos, and a new more educated self-aware me, who is trying to be more participative, involving and more measured in what I say.

I am operating in at higher level than before, and my maturity and ability to operate at this level is bound to be tested. Based on the interview with [REDACTED], even though I am feeling one thing about a situation, it seems I am able to outwardly show another. Another aspect of my maturity was within the meeting I recalled with [REDACTED]. I actively reflected within the meeting to stop saying what I wanted to happen (I attend the meeting) to agreeing and supporting the way he wanted to go. Through situational factors, other peoples help and some persistence from me, [REDACTED] has a coherent [REDACTED] programme that is embedded within the Business Units operational strategy. I am very pleased about this, [REDACTED] remarks that the programme is bigger than just me (and my drive to push it) was also very pleasing, as it is something that I have been actively lobbying for.

The [REDACTED] programme is now part of [REDACTED], which has the full support of the European CEO. It is natural that from its initial conception of a few people it will evolve and change over time into something else. The last vignette recalls my behaviour after two

years plus studying leadership theory and a great deal of self reflection. A quieter, more contextually aware leader has emerged from this studying. I have learnt to listen and think more, which allows for a more measured and thoughtful response to be given, even when emotionally charged about an issue. During the process of the ■■■ 'roll out' I was consciously trying to be supportive and behave in a way as the leader that I want to become.

This has had a positive effect, with ■■■, ■■■ and ■■■ being relatively complementary. If I'd have acted like I would have (as earlier), making a stand and arguing my point, I may have alienated people and the programme could have floundered. By being willing to compromise and listen to others, a better outcome has occurred. However, that's not to say that by compromising what I wanted, doesn't cause me frustration; it does. However, this case has shown that I am willing to take an overall look at the situation rather than just from my perspective This is a shift in thinking from me, that is evident as each of the case studies is read. I have gone from wanting to be in the centre and leading to being satisfied to be at the back supporting. My values have changed over the period, I valued metrics and logic (and I still do in the right circumstances) to make decisions. But I now seem to understand in some circumstances people's feelings, views and own agendas have to be considered if you want to get them on side, in order to get something you believe in to be taken on board.

These more measured and even handed statements about how he has changed over time from e.g. leading from the front to being supportive of others, indicate that the 'new more participative and contextually aware Ian Richards', is not just a flash in the pan. His writing is already showing this new side to him, and he seems to have entered another phase of indwelling and consolidation.

P 71

2006 – A regional manager stands making a presentation, out of his eye line another regional manager and the company safety manager roll their eyes at each other. The presentation he is making is ok, and he has a reputation as being capable but this manager is a know all, he doesn't recognise other peoples contribution and is aggressive when people disagree with him. He has his own agenda and works tirelessly to achieve his own objectives; the guy is hard to like...

Fast forward 4 years:

2010 – The same manager is now a Director , he sits watching as the safety manager is making a presentation on an initiative they have worked on together. The safety manager is pleased, he feels supported by the Director being there. The room is full of the other regional managers, who feel able to speak their mind, disagree and debate. The meeting atmosphere is amenable, yet professional, all those in room admire and respect the Director, and they understand and trust him: they enjoy working for him.

The two paragraphs above are a work of fiction, but both are loosely based on the situation that has been demonstrated thus far in this dissertation.

P 72

So my essentially 'first person' reflections on the 'what happened and why' of a series of critical incidents (Crisp *et al*, 2005,) will be challenged and enriched by the views of others who were also there. In doing this I will use a narrative approach to develop two 'landscapes' – one on the 'actions' and a second on the 'meanings/consciousness'

associated with these facts (White, 2005) to show three levels of influence (Whitehead and McNiff, 2006) :

- The influence these events have had on myself, my learning and my method of learning
- How I have influenced others
- The influence I have had on the formation of the social context, the new ways of working I have brought into the organization.

The quote below, allows me to put the structure of this chapter in even simpler terms: *All good research is for me, for us, and for them: it speaks to three audiences.... It is for them to the extent that it produces some kind of generalizable ideas and outcomes... It is for us to the extent that it responds to concerns for our praxis, is relevant and timely... [for] those who are struggling with problems in their field of action. It is for me to the extent that the process and outcomes respond directly to the individual researcher's being-in-the-world* (Reason and Marshall 1987:112-3). In the next section, I present what this research has meant **to me**. This is followed by the implications to the case organisation that I work for and the people within in it, (**the us**). It then moves to explore the implications for leadership (**the them**).

In these remarks, Ian is demonstrating a much more 'systemic' approach to his thinking, deliberately seeking views from these three different perspectives. Although he is talking here about this three part frame primarily in the context of structuring the next section of his dissertation, it is clear from his writing that he has also started doing this in his everyday work relationships

Pp 73-76

So what was the reason that as a production/operations manager I was doing well, yet in other situations I was not? It was more than likely that I was not adapting my leadership style to the different situations (contexts) I was now sometimes leading in. I did not have the leadership understanding that different problems have different levels of complexity and require different methods to effectively solve them. The type of the leadership problem is a useful way to help frame the context it should be viewed in. Heifetz *et al* (2004) differentiates leadership problems into Technical or Adaptive. Technical problems are well defined, the solutions are known and how to go about implementing a solution is clear. Adaptive problems are not well defined, the answers are not known and everyone involved in trying to solve the problem has a different perspective. Heifetz *et al* (*ibid*) suggests that with technical problems solutions can be implemented but with adaptive problems the solution has to be created. Further, the elements needed to solve the issue are scattered throughout the organization and an environment must be created which bring the necessary people together to solve the issue, with the leader facilitating the finding of a solution.

Grint puts forward a similar framework. However it was the work of Snowden and Boone (2007) that enhanced my understanding and gave me a framework in the understanding of how the changing situation can alter the effectiveness of different types of leadership interventions. A full summary of their framework is presented in Figure 8. However the continuum going from Simple contexts or 'known knowns' to Chaotic or 'emergencies': gave me a new personal vocabulary to understand the different organisational situations that I was facing (Ford and Harding, 2007). I had gained a better understanding of how to act in different situations. However, what also

became apparent that in more complicated less time constrained situations, a more team oriented, participative style gets better results.

Figure 8- Snowden and Boone model

Author's interpretation* of - A Leader's Framework for Decision making – Snowden and Boone (2007)

Context	What to look for	What to be mindful of	Suggested action
Simple	Correct decision is apparent (Day to day)	Glossing over the detail Always following best practice	"success breeds complacency" therefore review working practices regularly
Complicated	Correct decision is available (Seen it before)	Expert advice being seen as the only solution "Analysis Paralysis"	Listen to everyone's solutions. Trade off correct decision against a decision in the correct time frame
Complex	Unpredictable – correct decision will emerge. (Unusual situation)	Taking a command and control approach rather than allowing a solution to emerge	"Probe, Sense and Respond" Let the team find the solution.
Chaotic	Crisis – No answer available (Emergency)	Remaining in a command and control leadership style after the Chaotic situation has been resolved	Frame the situation to a complex situation ASAP.
Disorder	This context is when no of the above apply. To act a leader must take steps to frame the situation into one of the other four contexts.		

* this table first appears in Phase 1 assignment

These paragraphs make clear that the idea of context first mooted in the programme in Grint's writings on the 'constitutive' approach, has been moved centre stage for Ian by the Snowden and Boone model. Remember this was just an article I sent him on an intuition that he might find this interesting right at the start of the programme, and over time it has become perhaps one of his most useful new language-games. But to deliver its full effectiveness he needed to discover/create further language-games which could help him build a really powerful artifact that would transform his leadership effectiveness.

How to effectively practice these skills was now the challenge. In box 3 in Chapter 5 I dealt with a situation outwardly well, but internally it was very difficult. I was still hankering to be the out in front leader, taking charge, getting the credit and dealing with the issue. In Phase 3 (the leadership exchange) I had observed a different manager operating in a different culture. He used questioning very effectively to frame and reframe the situation, to give him thinking time, and allow himself time to understand the context.

So another important element is added to the mix and this time, not something from a textbook but from the experience of seeing someone embody a different more engaging

approach through the use of questioning. I may have underplayed the importance of Phase 3. Observing and being observed helped significantly in understanding some of the issues I was having. As many traditional managers/leaders abhor asking questions – these indicate ignorance not wisdom, and a lack of leadership, don't they? – this represented quite an emotional shift in Ian's attitude.

“Perhaps by asking questions rather than giving my views I can get a better understanding of the context, how the problems are being presented to me in, and then process if they are actually being framed correctly. [redacted] possibly uses questions to give himself thinking time to do this” (Ian Richards, 2009, Phase 3 assignment, page 9) (this was my comment at the time: are you familiar with NLP and the framework of ‘first, second, and third positions’? This provides some tools to help with the moving between positions that you are pointing to here.

I had been practicing this technique as it allowed me to test, probe and gain a better understanding of what the actual context was. I now had a framework to help me see the context of a situation with the Snowden and Boone model, and I had a method to help see what the actual context was, in order for me to then act appropriately. By the time of boxes 4 and 5 in Chapters 6 and 7 I had used these techniques to develop a more supportive, participative, lead from the back style, which is the subject of the next section.

P 76-77

Mintzberg (1999) believes that by holding up our leaders as “*heroes*” we undermine the hard work of everyone else in the organisation. Leaders who manage quietly are more effective. These leaders take time to find out what is going on from the bottom up... It seems that quiet leaders succeed by building a culture of trust and understanding problems that are put before them by team members before they turn into disasters and the leader has to “*step into the breach*”. This trust is built by taking on board different ideas by different people, working on the assumption that no one person will have all the answers... When you compare “*I deem, so that you do*” approach in Boxes 2 and 3 (2006-early 2009) to the “*We dream, so that we do*” (Gosling and Mitzberg, 2003,) in Box 4 (mid to end of 2009), the evidence for a more inclusive, guiding leadership style seems to be clear within this type of context In taking this approach the people involved (AP in particular) went from being very much against the proposal in Box 2, to arguing the passionately for the proposal by the time the second pitch was made (See Box 4)

He shows here how he is continuing through tacit and explicit ‘indwelling’ work to deepen and elaborate his understanding of what it might take to perform effectively in this more participative style. And following Polanyi, this work is not only developing his thinking but is enabling him to create tacitly the new embodied values that will drive and support the new behaviours required. I also believe that through this assiduous work-based ‘action-learning’ he is now practicing, he is also tacitly picking up the context influencing ontological skills that effective leadership depends on. I saw what Dave P was doing and I thought ‘I could do that’... Being quiet, asking questions and then responding was a simple and easy thing to adjust to. Seeing someone do it in their day to day job was more powerful than anything I could read about

Pp 78-80

Team work.

Katzenbach and Smith, (1993, page112) believe “A team is a small number of people with complementary skills who are committed to a common purpose, set of performance

goals and approach for which they hold themselves mutually accountable". For a team to work they need to have achievable meaningful goals, not overarching organisational targets. There needs to be commitment to the cause not people turning up to meetings with their own agenda. The strength of the team needs to be recognised by all in the team, and an addition to the team should be viewed as an opportunity, not a threat. All in the team should be committed to the team's objectives (including the leader). In this atmosphere the team can be a powerful entity capable of great things (Ibid).

By taking a different approach to the organisational norm in the ■ Pilot (Box 4), using new tools, and placing myself out of the normal role that I play, a team was formed. By doing real work (the training –see appendix K4) in showing my commitment, by demonstrating the behaviours I expected of the group (see appendix K6), by giving a clear process and explaining the benefits to everyone, and by opening myself up (see appendix K2) I was able to facilitate the formation of a team that believed in something that only several months before they did not. What happened in the interim and how I changed my perspective is explained below.

Another important element is added to the mix: not just using a more participative approach but engaging the power of shared vision, values, and ideas i.e. by creating a 'team' approach.

Coaching techniques

As Sherman and Freas (2004) point out, it is rare for relatively successful highly motivated individuals to step back and review their own behaviour Mintzberg, (1975, page 51, brackets added), suggests "*The leaders) effectiveness is significantly influenced by their insight into their own work.*" This is what occurred here, the learning process I have undergone while taking part in the MA in leadership studies has allowed me to understand my weaknesses and, once I was aware of them, I could do something about them. Without this awareness, there could have been a tendency to keep doing the same old things, leading to the same old results. However, the journey I have been on has been more than just reading the different theories and then trying them out. What has made the difference is the coaching I received during the course, and then (towards the end of the course) an insight into business coaching methods.

"No one learns anything without being open to a contrasting point of view" (Heifetz and Laurie, 1997, page 181). This is what my coach did for me, he challenged my assumptions, and he made me look at situations from different perspectives or using different frameworks: for example he told me about the Snowden and Boone article. He pushed me from 'horizontal' learning into 'vertical' learning (Rooke and Torbert, 2005) by giving me an expanded view on the world, making me understand things that were going on past my own experiences. In summary, our e-mail and web based conversations provided new ways of doing and thinking, reframed long held views by giving an outside view (Somers, 2008). As Albert Einstein once said "“We can't solve problems by using the same kind of thinking we used when we created them.”"

In a nutshell, I have been coached to a new way of thinking. So being coached has been a positive experience. What also provoked a shift in my thinking was actually using coaching techniques myself. Yep...this has got to be one of the key aspects of the programme for me...I was given a wider view, so is possible for me to help others do the same? The use of solution focussed coaching was a very positive experience and

helped me define my own context when it was used on the [REDACTED]. pilot study in Box 4, and has been useful in other applications. However, the most useful element of the coaching techniques has been the questioning, listening and then reframing. This allows me to probe and sense the problems I face without making a judgement until I have been given all the information. Since this has become embedded in my general leadership style, the behaviour is seen as being very supportive by the people who work with me

In finally pulling together his argument Ian clarifies more specifically how the coaching process has helped make the significant changes he has achieved, and in two ways. Firstly, many of the extra resources that I offered him on a responsive and timely basis throughout the two years, have hit a fruitful mark, as evidenced by their direct use in the dissertation. But in addition to these invitations to expand and enrich his world view, what he seems to value just as strongly are the challenges to his way of thinking and behaving and to the questioning of self-imposed boundaries to his ways of operating and his sense of identity and what it meant to be a leader. And secondly, this kind of provocative coaching process carried on online seems also to have helped develop his own coaching skills sufficiently to enable the significant shift in leadership approach that he has achieved – quite an achievement when you realize that the vast bulk of our interactions have been through the written word and online.

p 85-86

What has been my impact??

After all this reflection, what impact do I think I have had on the organisation...? The first most obvious answer is that through my persistence, I have been instrumental in delivering a working [REDACTED]. programme for the organisation. However, there are some more subtle aspects that I believe I have contributed to. They are listed below:

- Since the Pilot study in Box 4, the use of Solution focussed coaching has been used by others. [REDACTED] has used it in a health and safety workshop and the company HR manager has used it in employee engagement sessions. She is also currently looking at how coaching and mentoring can be integrated into the company management training .
- I have been aiming to encourage debate and disagreement. One clear forum this needed to take place in was the operations meetings, which now rotate the chair to allow all participants to have their voice heard rather than just the respective Operations Directors. I have also encouraged debate in my one on one interactions
- After [REDACTED] to taking control of the [REDACTED]. programme, the [REDACTED] have instigated a string of high profile projects, which are sponsored by an EXCO member, but led by others in the organisation. I feel that my contribution to the organisation has been to change how the organisation's leaders lead. Of course, some managers have not changed, and never will, but a wind of change is blowing within [REDACTED] and I do feel that I have contributed to it.

Pp 86-88

The implications for leadership and leadership research

At the beginning of this dissertation I used the quote below: *“The leader’s voyage of development is not an easy one. Some people change little in their lifetimes: some change substantially. Despite the undeniable crucial role of genetics, human nature is not fixed. Those who are willing to work at developing themselves and becoming more self aware can almost certainly evolve over time into truly transformational leaders”* (Rooke and Torbert, 2005, page 75).

The studying and coaching has been occurring in tandem with different organisational leadership contexts. It leads me to think that I have moved through different levels of leadership understanding as the knowledge and practice “click” in - sometimes in Eureka moments (I would read this as a reference to a ‘primitive reaction’), and sometimes just evolving (I would read this as ‘indwelling’ work). Rooke and Torbert (2005) have developed a framework that helps me understand this thought process in their ‘seven ways of leading’ which can be viewed in Figure 9. The framework is based around “*action logic*” which is to “*interpret their surroundings and react when their power or safety is challenged*” (Ibid, page 67). Leaders who understand their action logic can take actions to transform their own capabilities and move up the scale.

I believe that using this model to conceptualise my development is useful. I may have started off as a Diplomat in the days before the case started, but by Box 1 I was operating as at the Expert Action Logic, using a structured approach to managing relatively simple operational activities. An awareness of context, and the beginning of my journey on the MA programme pulled me away from the one best way of managing different situations to a method of the more flexible strategies of an Achiever who: “*Have a more complex and integrated understanding of the world...They’re open to feedback and realize that many of the ambiguities and conflicts if everyday life are due to differences in interpretation and ways of relating.*” (Ibid, 70) I would also put forward that by Box 5, I have begun to show signs of Individualist action logic by contributing “*unique practical value*” to ██████, by communicating and relating to other team members at different stages in their Action Logics to help develop the ██████ programme.

In a similar way to Jacques “*requisite, time span of discretion*” presented earlier, any framework like this it could be criticised for being too linear and hierarchical, and I’m sure that I actually oscillate up and down the scale as I carry out my activities, showing characteristics of all the elements of it. However, the usefulness of these types of model is to be able to demonstrate that different levels of leadership understanding are present within the organisation. In addition, the Leadership Development Framework acknowledges that at any one time a weighted range of styles can be present, and in the individual.

So how is this understanding acquired? How do you move from one level to another? The Collaborative Leadership Institute (2006) offers a useful way of framing leadership development. They believe that it must be considered using two dimensions, “*horizontal*” and “*vertical*”. Leaders typically engage horizontal learning strategies that expand and enrich their current way of thinking. Such as acquiring new knowledge, new skills, and new competencies, and all this takes place within a current mindset. Although this learning is important it may not bring about radical changes to an individual’s thinking, but does improve the person’s effectiveness. I would suggest that the work I did as part of MBA improved my horizontal learning

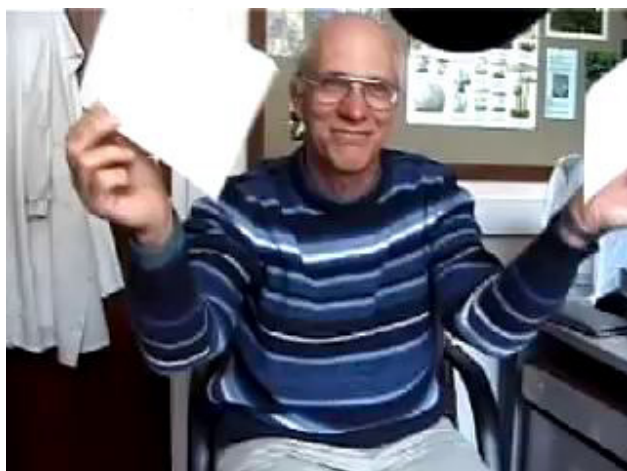
Vertical development refers to a transformational process where an individual progresses through a sequence of worldviews or action logics. Basically, vertical development expands worldviews towards deeper understanding, wisdom and effectiveness. (Susanne Cook-Greuter, in CLI, 2006). The MA in leadership has expanded my world view. Not by reading case studies about corporation X and how they should have done things differently. The learning has occurred by me looking at myself and my actions, through different lenses, and through other peoples perspectives. I have found a way to improve the way I lead by looking at the world differently. I have

become wiser by stopping talking and doing more listening, reframing and acting. I have become more effective by learning to understand the context around me.

As I say in my examination remarks on his dissertation: ‘His “inside story” of how he has changed while his organisation has been changing is very frank and engaging, particularly when he examines and tries to resolve the tensions he experiences in himself as he learns to change his way of working with others (pp 46-50). He makes a noteworthy contribution to the literature on how leaders at any level can go about developing themselves to improve their leadership, taking advantage of the multiple development opportunities in their landscape of action. I believe this is an excellent example of the kind of personal development this programme can stimulate and support’

APPENDIX 6

RAYNER'S DEMONSTRATION OF INCLUSIONALITY ON 'YOU TUBE'



24. Alan Rayner's demonstration of 'inclusionality' on You Tube

<http://www.youtube.com/watch?v=yVa7FUIA3W8>

In this clip Alan begins by asking how there can be boundaries that give identity that is important to communication, without losing something in the process. The relevant description for my point occurs between 40 seconds and 2 minutes and 40 seconds, with the critical statement occurring between 2 minutes and 2 minutes and 16 seconds. Using a sheet of paper he shows that there is a 'one-ness'. By introducing a 'fold' we can turn this 'one-ness' into a 'two-ness'. But in producing the 'two-ness' we have to have a 'three-ness', where the *fold* itself is the third. This is a third realm - the *included* middle - through which the one and the other communicate. This allows one side to pivot off and communicate one with the other, each moving reciprocally in a dance with the other. So we have a dynamically moving boundary which is making distinct *but not discrete*, the identities of the two. It's also the medium, the turning point, *the fulcrum* through which one and the other reciprocate each others' movements. So we have a distinctiveness which is essential to the communication, mediated beautifully through this dynamic boundary.

I'd like to use this clip to point to two aspects of the coaching relationship with Colleen:

- *that our educational relationship was characterised by the receptiveness and responsiveness characteristic of natural inclusion:* here you may recall that when in Chapter 5 I asked her to explain why she found the Belenky reading I recommended, so useful, she responded: 'Belenky is one of the few writers on this subject who has written what feels partly as a reflection of my life story. How could my tutor pick this up? Because there is an understanding and acknowledgement from him of the needs that I have identified at the beginning of the course, and an intuitive grasp of key issues that have arisen in my Learning Log and assignments, where I have been open and honest about my self-beliefs, and have been prepared to be challenged on these. I sense that my tutor and myself are both on an educational and personal journey, albeit he is further along the road. I feel that it is *synchronicity* [my emphasis] that our paths have crossed in this academic fashion at this time'

- *that in my use of e.g. the embodied 'presencing developmental possibilities' coaching tool, she experienced me as playing a special 'mediating' role: what catches my eye in the extract from the video clip above is the word 'fulcrum' because it's an important metaphor Colleen uses when she responds to the evaluative feedback questions on Phases 3 and 4 (see Appendix 4B in Chapter 5). In this feedback she makes the following comments regarding my contribution:*

*'Very helpful, particularly as my tutor has an intuitive response to directing me to papers/issues that will challenge me further!!...If the Learning Log was marked [assessed] alone I would make it 5. My tutor is so challenging, so wise and gives me so much material to work on, that I feel continually supported and blessed that I was lucky enough to be assigned to him!!...[I receive] Challenging material and challenging responses. Sometimes, I feel that the assignment is too easy, but the response from my tutor to my work becomes the real assignment!...I think that it is my tutor that is the *fulcrum*' [my emphasis]...Excellent - I couldn't have a better tutor than Keith: he seems to know exactly what I need!...I am living this curriculum!!!!'*

In saying that she experiences me as the 'fulcrum' I'm wondering if she is referring to the inclusional effect of my embodied use of the coaching tool 'presencing empathetic responsiveness to requisite situated practice', which is helping her mediate the learning interchanges between the propositional world of the Academy and 'studying' leadership, and her own emerging tacit knowledge of 'doing' leadership in the altogether messier and more painful world of work? As she was able to successfully negotiate the programme and achieve a good merit pass including several distinctions in her phase essays, I sincerely hope so.

APPENDICES TO CHAPTER 7

APPENDIX 1A

JIM (07-09): video excerpts from MA review



25. *Jim's review of MA part 1*

<http://youtu.be/PtHalR204PA>

In this first clip - *Jim's review of MA part 1* - Jim has been offering a strong critique of the quality and cost of the online WebCT system feeling that it's not interactive enough – 'just a text on-line' – and concluding that 'it's the coaching relationship that makes the difference'. His own interest is more towards personal development rather than academic prowess, but he acknowledges that students want the degree as well as development, and like the rigor of the process. He feels the learning logs are the most useful aspect as students know they are going to be responded to - it's what energises the process. He feels that one of the keys is confidence building – the scale of the thing...we don't deal enough with feeling and politics...often missed – it's difficult... and it happens at a micro level. Students experience great anxiety which goes all the way through the programme and especially at dissertation time. This was a great challenge... 'it's the feedback that made the difference – very grateful: that gave me the steer more than anything, that I needed.' Looking at the coaching relationship itself, we explore comments he's offered previously (see Appendix 1B) – 'it's the level of detail and attention to assignments that's had the greatest impact... 'it anchors the experience of learning around an interactive experience' and this relationship 'steadies the buffers in terms of the quality of reflection...[and regarding the 'development container']... very helpful in shifting my mindset...paradigm thinking – coach provides a different slant...about *personal* practice...very deep...quite personal'.



26. *Jim's review of MA part 2*
<http://youtu.be/hnVQWvryn8g>

In the second clip - *Jim's review of MA part 2*- we explore to what extent the online learning log/essay experience can approach conversation and dialogue with fleeting moments of influence – ‘very definitely!’ He says that not only can he imagine me saying what I’m saying but also my face and tonality. As we explore this further he confesses that as a result of this conversation he is ‘re-writing my own narrative’ - an example of a fleeting moment! We then talk about the idea of these regular written/online interchanges creating a ‘development container’ which enhances learning and he responds ‘that is the crux of it!’ Though he prefers face to face dialogue he cautions against dropping the learning logs – ‘important to get a balance weighted towards the logs which encourage reflection.’ He’s grateful for the ‘domain knowledge’ he felt I was able to offer him – despite my efforts to play this down - and felt he had ‘smartened up a lot academically’ due to the detailed feedback on the essays. We laugh at the thought of the weight of questions, challenges, and ideas he received from me in the first draft of his dissertation – ‘your amendments took every spare minute for three weeks to work through! But I was very grateful because it gave me the steer I needed’

APPENDIX 1B

JIM (07-09): e mail reflections on the coaching process

Key to ‘who’ and ‘when’:

Jim’s original comments

[KK’s questions](#)

[Jim’s responses to KK’s questions](#)

[KK’s subsequent reflections](#)

Dear Keith

Reflections

I was keenly awaiting the markings, thoughts and observations from my coach on the final (prior to dissertation) of the main assignments. This was the plan or outline of how to proceed with the dissertation. I had been in a positive frame of mind about this piece of work [can you recall what led to this ‘positive frame of mind’?](#) [Thinking back now I think it was a sense of light at the end of the tunnel but also the prospect of concentrating on an issue that I was personally interested in.](#) The uncertainty I think is predominantly unsure of process in terms of undertaking the study but also unsure of the criteria that you as the marker would apply to the plan. This uncertainty led, for example to me not including the beginnings of a literature review but believing this was the right thing to do. In retrospect I got the sense that you would have liked to have seen it and would have marked the work more highly, subject to quality of course, if it [had of been.](#) however still very uncertain about how to handle it whilst writing it. At one and the same time engaged by content and topical area of interaction, engagement , relational leadership etc but also mindful that this was 25% of the final mark – what should be included here – what can I should I include. I was aware that my mark hopefully would go up if I held onto this piece as my understanding and knowledge of

what was involved in a dissertation improved both in terms of research and process. On receiving the email from my coach with the attached feedback I avidly read the assignment again taking into account and assimilating the coach's feedback.

As always, taken aback by the level of detail and effort that he had made in offering this feedback. **What happens when you are 'taken aback' – what happens 'there'? This, I guess, is a mixture of grateful for the effort and time that translates into something that is helpful in improving future work. It is the tangible proof that somebody really did read it word for word and the knowledge, consistently that this level of attention is paid (am I modeling one of the indicators of progress i.e. 'rigorous', here?) – does impact on future motivation and attention to detail for me.** Probably of the “whole masters experience” it is this level of detail and attention to my assignments which has had the most impact on me. Pausing to reflect on this ... at this stage ... a number of thoughts bubble away. Firstly it resembles to me a form of conditional AND unconditional regard. Conditional regard in the sense that if something is poor/weak and could be improved then that feedback is given but there is also a strong sense of unconditional regard felt in the nature of this relationship - and I think, perhaps, this is held in the space that says metaphorically speaking “even though this was poor/ weak and could be improved I (the coach) will STILL give 100% attention to this. **are there any other clues that support this kind of understanding? I think this is evident from the beginning of the journey but is constantly reinforced through consistent approach to quality of feedback which is inherent in the repetitive nature of the learning contract between coach and coachee.**

- It is very encouraging to receive feedback where the coach has clearly concentrated on the response – it would be impossible to give this level and clarity of feedback without such concentration and consideration (**could these be synonyms for 'responsive' and 'receptive'?**)
- Simultaneously I have been thinking that it must be more difficult to operate at this high level as a coach in the early stages of the course when the “student” has less knowledge and less able to discuss leadership issues. **what is it that stimulates this line of thinking i.e. that the student needs more leadership theory before the coach can help? I think this remark, of mine, perhaps refers more to my sense of the interest of the coach in engaging with the coachee improving as the coachee becomes more knowledgeable. I probably adhere to this as a valid way of thinking now than I did when I wrote that! Some of the things about knowing, imposter syndrome which were discussed in my dissertation relevant to me here I think.**
- Conversations with my coach have become much more interesting and engaging since I have been clearer on my own direction and my energy has risen in response to this
- To have this energy mirrored and reflected has in itself been energizing – it is like a positive virtuous repetitive pattern of behavior which promulgates the desire to improve quality and effort. **what does this suggest to you about the development of relationship and the reciprocal influence between this and conversations?**

These thoughts are very positive but also when reflecting on written markings I, at the same time find myself mentally arguing with them along the lines of “yes but (!) if he knew I was actually thinking this would he have said this “ or “ this is an unfair remark because”. Is this a natural or rather childish reaction to professional feedback – I find it difficult to decide. **What do you think might have happened if you'd taken these issues up with me say on the telephone, and we'd reached some accommodations? If we had taken these ideas up on the telephone I think it would have been very productive for me after each marked assignment was returned. In fact this would be a very helpful process**

to improve learning. My sense is that this would then create a very helpful learning conversation which also would build relationship. May be sensed by coaches as being a bit more demanding – I don't know. However it is I think the repetitive cycle – which in some way mirrors “staying with the relationship and the pain” which overwhelms these feelings in a positive sense and moves or helps to move the learning to a new level. This is an interesting point: could you say what aspects of the process and the feedback helped ‘move the learning to a new level’?

I wonder as I am reflecting on this whether they are rather ‘narcissistic’ observations in what way? , dependant on the relationship, rather than an inherent quality or desire for achievement – not clear what you mean here? but then without the coach/coachee relationship the course is merely a distance learning package – having done 6 years distance learning to qualify as a Chartered Secretary I know what a dry experience this can be. Given this comparative experience, how would you describe the contribution that the coaching relationship and coaching offers? Yes - it anchors the experience of learning around an interactive experience rather than merely a test of endurance and self discipline for self study. This means that the relationship steadies the buffers in terms of the quality of reflection but still respects (or so I found it) the learners nervousness that they may not be up to the job. For me I sort of lurch from thinking a I am going to struggle with this programme, too difficult, too much of a commitment etc to knowing that I am capable enough to do it – just need to get on with it. Would be very unhappy if someone suggested, however, that I could not do it! (so - the ‘relationship steadies the buffers in terms of the quality of reflection...’ and ‘...anchors the experience of learning round an interactive experience...’: is it this then, and the intense ‘level of detail and attention to your work’, that conveys the ‘conditional AND unconditional regard’ that characterises the coaching contribution?)

Having read the observations of the assignment I rang my coach to discuss one or two areas which would help me get an accurate sense of how to proceed from here. What impacts are there from this conversation? I was expecting my coach to be more professionally critical (as I write this I still do not know the mark awarded) (did the mark perhaps clarify the level of ‘criticality’?) of the piece/assignment on the phone – perhaps he was just in a good mood. This is probably a reflection of how carefully a learner who has put in a reasonable amount of motivated work on something anticipates and absorbs in great detail the feedback on it. In contrast I found this conversation considerably helped my confidence particularly as the mountain of data analysis was put into perspective and at least focus – something I was finding very difficult to do. Can you recall any particular ideas, challenges, questions, comments, or actions that helped your confidence? Again, I think, it was the sense of animated discussion which was growing which essentially was based, on two people discussing something both were genuinely interested in. Comments which were affirmative of general direction create a sense of confidence to keep moving forward

It is rather pleasing to believe that my coach thinks that my general area of interest at this stage is “an exciting one” – definitely a feel good factor to hear this and a spur to get on with it. At the same time the balance is that no matter what I have learnt the coach seems to have another good reference to offer in this area – maddening in what way?; what would encourage a more positive response? Well this is not really a negative response perhaps just part of the realisation of how big the field is and how much one could know – as I said and helpful. This conversation reinforced a feeling new to me in recent weeks that I have and am achieving a new level of attainment in my learning with this programme – and I must get over this last hurdle

somehow – pain and all. The impact from the coach is very much around having an ‘interested’ observer of this journey interested in what? Interested in the subject and the learner. Whilst you did not vocalize this I got a sense from you that you get some satisfaction from seeing coachee’s personal growth and learning develop. which seems to balance positive and negative and unconditional and conditional regard of the self. I would be very interested to discover what are the ‘moves’/‘interactions’ that seem to create and support this kind of learning climate! (I’m still interested in this – the kinds of questions, comments etc that embody this ‘regard’!) I think it is the interest of the coach in the learning of coachee in terms of own personal practice and knowledge development. Just interaction. Conversation does not have to be perfect or analysed but those which overall are well intentioned serve their purpose- -couple that with some real professional experience and knowledge – very powerful for a coachee. (so this seems to be about the value of *domain expertise* being offered by the coach as against the more usual non-content orientated feedback?) It was interesting to meet one of J’s coachees with him over lunch the other day – I got the sense that some of these views would be shared by that person.

The best moves, for me, were the ones which enabled dialogue. This was most likely in conversation face to face or over the phone – these sort of underpinned the value of the learning log. Sometimes the learning log disabled dialogue. Can you say what was disabling/enabling?

Regards
Jim

KK reflection 21 April, 10: the experienced emotion of ‘*conditional AND unconditional regard*’ arising from the intense ‘level of detail and attention’ offered on a regular basis, seems to capture the educational impact of my various ‘interventions’ (from my ‘responsive repertoire’). This over time has the effect of creating and sustaining a ‘...*relationship (that) steadies the buffers in terms of the quality of reflection...*’ and ‘...*anchors the experience of learning round an interactive experience...*’. So in the end, in spite of the virtual and asynchronous nature of much of the interchange, I wonder if Jim feels that it is ‘dialogue’ anchored within the ‘interactive experience’ that is the core educational process?; and that co-creating and sustaining this over time in a timely and situated way, could also be described as ‘presencing developmental opportunities’, and further, closely characterises my coaching contribution?

APPENDIX 2

VRENI – FELDENKRAIS' AWARENESS IN MOVEMENT



27. *experiencing the continuous nature of the body*

<http://youtu.be/KrH8BimgYdY>

The problem I bring to this session with Vreni is pain in my right sacro-iliac joint, something I've been suffering from, from time to time, since it first occurred after an uncomfortable flight from South Africa a couple of years ago. We've worked on this before and this time she is trying out a slightly different approach which involves me sitting on a chair and doing some movements under her attentive guidance – the Feldenkrais principle being increasing 'awareness through movement'. (I apologise for the 'headless' images you see a lot of the time, but all the 'action' occurs in my back which is why it is the centre of attention!)

The video clip offers a beautiful illustration of how simply and quickly the method can raise 'awareness through movement', revealing to my body how better to 'go on', and in so doing, implementing the changes needed. A better example of 'close learning' could not be imagined! Towards the end of the clip, it also shows me 'presencing a developmental opportunity' to myself as I explore the links between Rayner's concept of 'natural inclusion', revealing the continuity in my body that I'd forgotten about, and allowing me a much easier and natural pattern of movement. So it's also an excellent example of inclusionality at work.

Here are a few comments to help you understand what is happening:

- The video starts with her asking me to move forward and downward as far as I can, while she monitors movement in my back/hip region. I seem to get stuck quite early on and in exploring what is causing this, she gets me to visualise where the movement is being stopped and what has to change. Notice she has her hands lightly touching my back and pelvic girdle area all the time

- I guess that to go further, the movement needs to start from the hip bone/iliac crest but as I gently go through the motion back and forth – ‘just a millimetre at a time’ ...she suddenly stops me (at 1 minute and 57 seconds): ‘ah - and here we have something!’ She has noticed that I’m starting the movement in my lower back – the hip bone/pelvis is virtually motionless – and so all the weight of my upper body is being borne by the muscles of my lower back – no wonder it is tensed up and causing strains lower down!
- She encourages me to use the ‘hip fold’ to act as a hinge and to ‘roll the pelvis’ forward and backward. As I do this I go forward and come up more easily and with a rueful laugh, confess: ‘I was holding it (the pelvis) fixed...as though it didn’t exist!’ This is the key moment as the ‘primitive reaction’ stimulated by Vreni’s light touch suddenly reveals itself as a new way of thinking about that movement: use the hip fold as a joint and leave the lower back out of it!
- She then uses a physical model of the pelvis to show me how it should be working in the moving forward and down movement – basically the pelvis is ‘pushing’ the spine forward, and eventually rolling off the chair. At 5 minutes and 10 seconds my movement is already much easier and natural with little tension in the back – ‘that’s beautiful’. The primitive reaction has already been transformed into a new ‘ontologically’ oriented language game – such is the speed of learning/developing that our bodies possess!
- Later on (at 7 minutes 28 seconds), I start ‘presencing’ a developmental opportunity for myself as I relate this to my chi gung experience (the hip fold is called a ‘kwa’), and reflect on how Rayner’s concept of ‘natural inclusion’ (notice Vreni’s ‘say that again?’) offers a different but complementary way of framing what is happening: the new ‘awareness through movement’ provoked by Vreni’s work with me has allowed me to reveal to myself the essential continuity in my body that I’d temporarily forgotten about: my hip fold had become an ‘excluded middle’! Rayner’s You Tube video demonstration using ‘folding paper’ (see Appendix 6 in Chapter 6) shows clearly how my pelvic girdle/hip fold acts as the ‘fold’ or ‘fulcrum’ or ‘included middle’ that allows me to find an easier way to go on.

APPENDIX 3

PAUL – A climate of inquiry



28. *a climate of inquiry*

<http://youtu.be/b1s2COy2QQk>

The video clip begins near the start of my review discussion with Paul some 6 months after he'd completed the MA – and I'm sorry about all the background noise from Shoreditch High Street outside! – as I'm setting the scene and explaining why I want a video record. I also emphasise that the discussion is 'not affirming process but learning' so still part of the research process.

At 1 minute 30 seconds I ask him to talk about on something he'd written in a log about the creation of a 'climate of inquiry': what do you mean by it, what led to it, and with what effects? He says it's an 'aspect of the relationship...triggered off by...your credibility...really motivated me to get involved in study...*not* an academic exercise...*not* re-gurgitate theories...but inquiry – looking into things in more depth applied to reality...looking for leadership in that area.' He says the slot I did at the Induction workshop resonated with him...provocative questions...'talking about the atmosphere around my own personal learning ...you were part of creating that arena...and being in that arena - really'

I ask...so an initial 'kick-off'...but I must have done something to keep that going? Yes 'it gathered momentum...high levels of trust/credibility...what you say resonated with me...challenges me....confronts my own understanding of the world...just fleeting comments in the logs...stopped me in my tracks'... So I suggest to him, it's a mixture of that initial rapport then a series of fleeting things...some with more buzz than others... kept up that sense of - let's look at these things?

He reflects (at 6 minutes and 30 seconds) that he felt that ‘you’d probably already been there yourself...strong hand on most of the theories...and on learning...a little mystique there...you were really going to help me...[in this] you were creating me as a follower... you were the one I would want as a coach...well chosen...and I was happy to become a follower, in that inquiry.’

Did the regular feedback maintain that image? He says...it *added* to it...the provocative comments though very uncomfortable...forced me into further inquiry...forced me into quite a lot of work actually (outburst of laughter at 7 minutes and 58 seconds)...was looking for feedback and to get a recognition for work done...of my deeper understanding.’

(At 8 minutes and 42 seconds) I ask what was the [my] ‘leading’ about? ‘Taking me on a journey...you knew the way...wasn’t a case - *this* is the road, but these are your choices: which path would you like to take?...and felt you’d be there which ever path I chose– that was a powerful thing’. I remind him of the metaphor in Milton Erickson’s story about the lost horse...you know where you want to get to go...he responds ‘that’s the intriguing part, that’s where the curiosity and inquiry come from...but I’m not sure where the home is’...(I interject but you’ll know when you get there...it’s about just taking the next step). He continues ‘the inquiry was facilitated by yourself in provocative comments that forced the inquiry...I need to do some research here...really Keith has ‘exposed’ me here... I’m naked at the moment (I interject just as well we’re on distance learning!) – yes, I need to find some clothing to put on here!’ (loud laughter at 10 minutes and 48 seconds)

He continues: ‘from day 1 on the learning aspect ...you sent me an article by Drucker...I’ve taught on learning styles ...this opened up a whole new chapter... changed the way I operate in the classroom...now at a much deeper level on Kolb... much more productive...adding to the slides on learning styles...added ladder of inference...reflecting *in* rather than after’. At 11 minutes and 35 seconds he says: ‘my lessons became more productive’ and I ask him, how do you judge that? – ‘more responses...more challenging questions...it’s purely through feedback. I think it’s because when you have experience you can relate it to the theory – they sense that you know...not just theory anymore...and you can challenge that theory’. I add: there is a difference in energy and he agrees: ‘...as against saying this is what *he* said - you’re making it relevant to what they do... there’s resonance a bit like a radio wave...it peaks...enthusiasm goes up dramatically.’ I interject, almost like a fleeting moment!

He concludes: ‘I think it was - it built from day 1.’ I respond: that’s good...that’s a nice idea – I’d like to be helping create a climate which helps...He says: ‘I felt a sense of togetherness...you weren’t the assessor...and *not* there just to help...advise...you were being on the journey...I draw a series of hills – this is what it looks like to me...you say yeah, come over here...oh my God...what I saw as a mountain...is a mountain range!’ (loud laughter at 14 minutes and 45 seconds)

Apart from the clear affirmation of many of the ideas I’ve been talking about, seeing this video again reminds me of how much pure pleasure I get from working in this side by side manner with my students, where we both gain so much from each other both in terms of the warmth of our relating as well as new knowing about how the learning process works. I think this provides good examples of what I’ve called ‘empathetic responsiveness’ to situated practice (especially at 10 minutes and 48 seconds and at 14 minutes and 45 seconds when our ‘joint action’ results in peaks of living energy)

APPENDIX 4

SCOTT: e mail interchange on question: ‘have I influenced the educational social formation?’

From K to S

I’m sure you must be vaguely aware that I’ve been working on a PhD for some time now, using my coaching work on the MA as the central focus of my research. I’m now in the death throes of doing a final edit on my altogether far too long earlier draft, checking references, and seeking out a few final potential sources of support from earlier and current students for what I’m saying about the educational process.

One of the areas I’m making some claims about concerns what in Bath action research jargon is called the ‘educational social formation’ (or social formation for short) in which my coaching and research work has been carried out. In this regard supervisors and examiners seem to be interested in how this might have influenced my work and vice versa, how I might be influencing it. In my final chapter, Chapter 7, I have written a short section which is devoted to describing what and how I believe I have influenced the social formation in which the MA exists. Though my claims aren’t extravagant in this regard, I do feel I should seek some critical comment about these from others in the know, and some corroboration and/or elaboration of what I’m talking about. My supervisor and I think you are ideally positioned, qualified, and knowledgeable to offer an informed critique, and I’m wondering if you might be willing and able, in your busy schedule over the summer, to find a little time to do just this?

At this stage I’m planning to include all or a selection of any comments you’re willing to make, alongside the text I’m attaching to this mail so that the examiners have the opportunity to get a more rounded view of what might have been happening in this area. I hope you’ll be able to help and look forward to whatever you are able to do offer. Many thanks in anticipation...

From S to K

Hope all goes well with you – I found myself awake early this morning thanks to the birds outside, so as a positive side effect of that, here is your chapter with comments. I hope they’re useful, encouraging, whatever you would wish to find in them. I’ve tried to explain how I approached the process, and would be happy to talk more either by email or skype. I should also note here that I’m reading and writing as someone who is fairly, er, hostile to action learning/action research... but don’t let that put you off!

I’m writing this introductory section last, having worked through the questions below. I read the questions, didn’t retain much of them, then read the excerpt. I’ve not edited the comments or re-read them, so you’re getting them pretty much as they formed in my head, as quickly as I could type them here on a fairly wobbly table [I’m working away from both campus and home at the moment]. I read your chapter excerpt through twice,

then returned to the ‘interesting bits’ [you know what I mean by this, and you are not thinking that it means some bits are uninteresting!].

So, you know where I’m working and how in terms of practice: in addition, I’m thinking, writing, commenting as someone who has gradually become more committed to a rather traditional sense of what academic work and study are, or should be. My interest at the moment is not especially in managerial or leadership practice, but in doing what I can to encourage more critical reflexivity, mostly based on empirical and conceptual robustness. In other words, what’s the evidence [see below] and how good is your theory? This, I hope, means something about always thinking, on the basis that if you stop thinking you simply reproduce, and nothing changes for the better. I’m most concerned about this in relation to gender at the moment, but it could be found in any social formation – class, race, managing, organizing, production, consumption, whatever. This is how I’ve read your excerpt, with a more structural lens than yours [I think].

And I enjoyed it, and appreciate you sharing it.

Is my account here *comprehensible*? Any suggestions on how this could be improved?

It’s relatively difficult to comment on the comprehensibility as in coherence, without the broader context of what comes before in your thesis. In itself, I found the section below very comprehensible – but then I would, as I’ve been working alongside you for three years, listening to you and reading what you write to students and colleagues. As you know, you are one of my more vocal colleagues in both of these communities [student and academic], so there’s been plenty of opportunity to get to know you and what you think about things.

If there is anything I would have liked here, it is more sense of narrative. [This is mildly ironic given how much emphasis you place on storytelling and engaging readers in your comments to student....] I’ve always approached academic writing looking for the story, and tried to incorporate narrative as an aspect of my own writing practice, so when I struggle to find it I get frustrated – and then start making up my own stories, which isn’t always helpful. So, I’d like to see you make this writing more comprehensible, by which I mean in part more seductive, by telling me more of a story.

Have I presented sufficient *evidence* to justify my assertions; how might evidence be strengthened?

I sometimes tell myself I don’t believe in evidence, that there are just stories, more or less convincing. Then someone says something controversial, and I think ‘well, how do you know that? What’s the empirical basis for that truth claim?’ So I guess I do believe in evidence, and certainly prefer some notion in that area to assertion.

On this rather ambivalent basis – you present excerpts from pieces that you’ve written, to which there are responses, either written or verbal. Do you have those to hand? I think they would be helpful, in terms of representing the wider social context that you have been working in, and in presenting more of a sense of conversation.

This takes us close to the centre of a key comment I have about this piece of writing, relating to closeness and distance. You make some claims about how things work in the university, in the b-school, and in CLS. Some of these I agree with; but a lot of the time I think you are tilting at a windmill, in the sense that I think a lot of what you would like to be the norm is, at best, contested. So, for example, what I understand you to be writing about as conventional learning, conventional pedagogy, conventional engagement with students, is alien to my professional practice. I think you are writing

about a form of teaching and learning which *does* exist, but not in my practice and not in the practice of colleagues [at Exeter and in my wider educational social formation]. This has become something of a bugbear here, because Exeter and the business school in particular are pursuing a so-called mixed economy of faculty. In practice, this means that staff are defined as either research active or teaching focused. I find this infuriating and alienating, as well as educationally, pedagogically, and professionally crass.

That's my context. Those of us working on the MA programme are indeed below whatever radar exists, as you note several times, but I also practice in exactly the same way when I teach on undergraduate, MBA, continuing professional development, and doctoral programmes. I know that some of my colleagues here do as well, because I either co-teach with them or find sympathetic listeners when grumbles like this rise to the surface.

So, returning to your question here, finally, after that probably-unwelcome insight into tenured academic work at Exeter -

I would concentrate more on your experience, your practice, how you find engagement with the working context that frames the MA programme, and the implications for pedagogic practice – with less reference to the disciplinary potential that your employing organization contains, because the spaces for resistance are so open, so broad, that I don't think that disciplinary potential is realized in any meaningful way. It affects how you *feel* about what you do, and possibly why, but I'm not sure it is significant in framing your actual practice. Professional identity trumps managerial desire?

Have I shown an *awareness* of the influences of the values and norms in the context within which we work, as well as those that influence my own performance? Any suggestions how I might deepen this?

Ah-ha. See the comments above, mainly... but I imagine also that this process enables you to respond to this concern. I'm assuming that this text has also gone to the two other named characters, Donna and Peter. One other thought in this respect – I gather from this that your philosophical and educational frames are well set and depth-ful – but I am now wondering about your organizational frames. In the spirit of practicing reflexivity in that respect as well as those others, where are you in thinking about the organizational dynamics, interpersonal, cultural, structural, whatever you choose to think about?

Have I shown that I'm being *authentic* and committed to living as fully as I can the values I espouse ?

I've got some sense of the values that you wish to embody and practice, from this writing and from working alongside you, but I'd need a lot more information, conversation, knowledge to be able to make a meaningful or definitive comment here. If I ever could. I *believe* that you are profoundly committed to a particular form of learning, which you in turn believe is marginal and/or neglected, and I *think* that you are very uncomfortable with the implications of modernism as they are manifest in education – but as to whether you are being authentic, I have no idea. I trust you, I really enjoy working with you, and I suspect that you seek coherence between what you believe and what you do – but I don't know. If that's authenticity, then you've got it. But I'm not sure it's that important as a label.

From K to S

Thanks very much for giving me some feedback on this – sorry it involved in you ‘losing sleep’!

I haven’t sent it to the other ‘directors’: Peter departed after the first year, Donna never took as much interest as you do in student work and coach feedback, and Annie never really got started. So I thought you were in by far the best position to assess how my work with my students has influenced how they experience the educational social formation in which the MA is delivered.

From your feedback I think the answer to my question is a definite ‘no’ - but this I think is qualified by your view that disciplinary power relations aren’t really an issue in universities anymore, so I’m making too much of this and just ‘tilting at windmills’. Fair enough – I did ask you! And though I don’t agree with your conclusion – and why should I see things your way given I’m just a lowly part time practitioner-coach and not a not a fulltime tenured academic - I appreciated how you clarified your observing position as you offered your comments. As my supervisor said ‘I enjoyed his disciplined and scholarly responses’.

So thanks again for making the effort. I will look again at the lack of ‘seductiveness’ in my account and see what I can do about surfacing the ‘organizational frame’ I’ve been working within. And thanks also for the positive remarks right at the end – ‘label’ or not, they’re good enough for me!

From S to K

I should probably have re-read the comments, for tone if nothing else. My apologies if they come across as destructive or confrontational, and I certainly don’t want to imply any pulling of rank, either academically or organizationally – that goes against everything I hold dear in everyday life and want to transfer to my working life. I’m a secret radical with strong socialist roots, you know....

I don’t really think you’re tilting at windmills with this work, thinking, and writing. I’m absolutely clear that the vast majority [90%, 95%? Who knows – the majority] of what goes on in universities is completely opposed to the way you think and practise. I should have made this clearer. I guess I feel at the moment that I don’t want to think about or acknowledge all of the crap stuff – I’d rather try and pretend it doesn’t exist, in the hope that it might go away [or at least that its practitioners will leave me alone]. A vain hope, I’m sure, but it’s the only way I can think of at the moment to a) survive and b) approach some kind of ethical professional practice. So I’m fully in support of what you’re doing, writing, thinking, and saying – you’re coming at it from a different angle to the one I think will be fruitful in the long struggle against the dark forces of modernity [!], but I like to think we’re both going in the same direction.

As for seductiveness... well, I know from working with you that you can write more from the heart than that! Do keep in touch about it if you’d like to – I don’t want to interfere in the supervisory process, but am always happy to read or talk if it would be helpful.

APPENDIX 5

PETER – grading comments on Phase 3 Essay on a ‘leadership exchange’

Commentary accompanying essay mark (note the ‘formative’ manner in which I offer my ‘summative’ grading remarks)

I very much enjoyed your ethnographic tale ‘from the field’ (van Maanen, *Tales from the Field*, 1988) and appreciated the way you used your ‘field notes’ and drawings, as well as reflections on your feelings and thoughts in the moment, to evoke the sense and dynamics of the location you worked in. Though we’ve talked in the past about you developing a more tightly focused and argued style of writing, the informal juxtapositioning of these different elements as well as the telegraphic style of many of your entries worked for me in this context. And in regard to the personal challenge we identified for this essay i.e. to write a piece that stayed focused on a theme and didn’t zoom off following lots of other interesting leads, I’d say that here you’ve been largely successful, containing your many curiosities and enthusiasms, and writing a piece that flows and holds together – so well done!

The observations and learning that you report on here show again that you’re able to work and think at many different levels and find interesting connections between these like e.g. learning from your observations about their experience there and then to introduce changes to your experience here and now, to go both inwards and outwards from an observation to find grounds for understanding a situation in different ways, to identify and suspend assumptions which might create blindspots, and to use ideas in an academic text like McGilchrist’s book, to fashion your own ‘psychological instrument’ (Vygotsky – see below*) through which to connect to, understand, and influence your own environment. My impression is that you’ve really taken to the ethnographic method and I’d recommend that we spend some more time looking at this approach as a potential research methodology for your dissertation next year.

* <http://www.stanford.edu/dept/span-port/cgi-bin/alhadith/2010/03/07/notes-on-vygotsky-and-aljamiado-literature/>

In your second essay you did come up with the metaphor ‘living as improvisation’ and here with your phrase ‘forever evolving and refining’, you seem to be getting more open to the idea that things may always be happening for yet another *first* time, that it might therefore be useful to regard these as ‘developed and developing’ in nature (Garfinkel, 1967), and that in communications at least, we might indeed be engaged in interactive processes that share a family resemblance to jazz improvisation. By this I mean that in our gestural/bodily communications, though we signal expectations and anticipations to others that indicate a trajectory of thought, we depend on their responses to know what we seem to be meaning. And further that this meaning making is a negotiated process that is determined *within* the conversation, and not through reference to external codes or authorities. John Shotter calls this a ‘third kind of knowing’ or knowing *from* which can be used to counter-balance the influence of propositional (*what*) and technical

knowing (*how*) and round out our appreciation of events in line with McGilchrist's argument. In this process your ploy of 'suspending assumptions' is critical as was your use of 'shapes' to help convey your feedback in a vaguer more ambiguous way: these probably led to just this sort of conversation...?

Looking forward towards Phase 4, I'm hoping that you will be able to build on this exposure to the ethnographic approach to research and use it more specifically to work on those development edges that you've identified in the first three essays, and to clarify the nature of the 'living theory' that you're seeking to perform in your various work roles in Iceland. I can sense that this is still quite fluid and, as you've done previously, it will pay you to engage in some more deliberate forms of experimentation to surface what's really central to you. Though you won't be formally introduced to this method until Phase 6, I think you should begin now to set up a more systematic *action research* process which will help you frame your everyday work as a series of *cycles* of 'action' and 'reflection', developing your skills *as* you resolve important working and living problems with others. If you are interested I will help you do this before Phase 4 starts and then we can use our Skype conversations to reflect on how this is working and what you're finding out about improving your leadership practice. Enjoy the summer break!

MISCELLANEOUS APPENDICES

APPENDIX 1

MA IN LEADERSHIP STUDIES LIST OF STUDENTS COACHED BY KK

04-06

Alison	MA Distinction
Jason	MA Merit
Mark	MA Merit
Catherine	MA Merit
Richard	MA Merit
Stephen	Diploma (awarded 2010)

05-07

Gerry	MA Merit
Dien	MA Merit (awarded 2011)
Steve	Diploma (awarded 2009)

06-08

Matt	MA Merit
John	Diploma
Geoff	Certificate
Steve	Certificate

07-09

Jim	MA Merit
Asaad	MA Merit

08-10

Ian	MA Merit
Paul	MA Merit

09-11

David	Certificate
Jules	Certificate
Iain	MA Distinction

10-12

Peter	MA Distinction
Kadri	MA Pass

11-13

Andy	(Certificate - in first year)
Jane	(MA - in first year)
Fran	(MA - in first year)

APPENDIX 2

SUMMARY CV

KEITH KINSELLA

Affiliate, Centre for Leadership Studies, University of Exeter
Independent Change Management and Development Coach

SUMMARY

Keith Kinsella is an Independent Consultant and a member of the Professional Network of the Centre for Leadership Studies at Exeter University where he provides consulting and development services to clients of the university. He also provides coaching on the MA in Leadership Studies, and runs his own consultancy practice specialising in coaching, change management and organisation development in large organisations.

Throughout his career he has pursued a particular interest in devising ways of helping professionals learn more effective ways of providing leadership at the critical interface between context and individual. His research, teaching, consulting, coaching and writing now focus on how managers learn from their practice principally in places of higher education and in partnership-based networks in local government. He is currently developing a process oriented real-time approach providing action inquiry support to leaders as they address problems of change and continuity in the workplace.

EDUCATION

He originally qualified and practiced as a civil engineer in South Africa and Canada and later completed an MBA at the London Business School, prior to taking up a series of managerial and consultancy roles in industry. He is currently completing a part time PhD at the Centre for Action Research in Professional Practice at Bath University.

ACADEMIC/TEACHING

He currently coaches on the two year Coached MA in Leadership Studies for mature students at Exeter University. He has also tutored on the Postgraduate Diploma in Systemic Management and Consultation at Birkbeck College. At an earlier stage in his career he supported a similar programme at the Tavistock Clinic, tutored on the MSc in Management at Kings College London, was a staff member on Grubb Institute working conferences, and tutored on Kensington Consultation Centre systemic management programmes

EXECUTIVE DEVELOPMENT

Over the past two decades he has designed and facilitated a wide range of tailored senior management and organisation development programmes for individuals, groups, and teams within organisations like the BBC, NATS, VISA, Greenwich Council, Royal Mail, and Selex.

CONFERENCE CONTRIBUTIONS/PUBLICATIONS

- Campbell, Coldicott and Kinsella, 1994, *Systemic Work in Organisations*, KARNAC
- University of Exeter - Studying Leadership: 3rd International Workshop - Leadership Refrains – Dec 2004: *Approaching Leadership as an Art: the Development of Practitioner Researchers*
- Kinsella, K, 2008, *Leadership development and 'close learning': reducing the transfer gap*, Chapter 3 in Campbell and Huffington, 2008, *Organisations Connected*, KARNAC
- Ladkin, Case, Gaya-Wicks, and Kinsella, 2008, *Developing Leaders in Cyber-Space: The Paradoxical Properties of Online Learning*, Leadership 5(2), pp.193-212

CLIENT EXPERIENCE

BBC, Arthur Anderson, UBS, ITT, EMI, Merck Sharpe & Dohme, VISA, National Power, Lex Service Group, Unilever, Reading, Greenwich and Lambeth local councils, NATS, NHS, Scottish Enterprise, Scottish & Newcastle Breweries, National Coal Board, British Airways, Continental Can Inc, ESCOM (South Africa), Exeter University, Royal Mail Group, West Suffolk LSP, Prudential Corporation, SIMI (Denmark), Vestas (Denmark), Selex Galileo, WASP, PPP.

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