

## **INFORMATION TO USERS**

**This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.**

**The quality of this reproduction is dependent upon the quality of the copy submitted. Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.**

**In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.**

**Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps. Each original is also photographed in one exposure and is included in reduced form at the back of the book.**

**Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.**

# **UMI**

**A Bell & Howell Information Company  
300 North Zeeb Road, Ann Arbor MI 48106-1346 USA  
313/761-4700 800/521-0600**



**University of Alberta**

**The Birdwood Conversations:  
Illuminating a Practice of Interpretive Inquiry**

**by**

**Lynda Gertrude Mitchell Workman**



**A thesis submitted to the Faculty of Graduate Studies and Research in  
partial fulfillment of the requirement for the degree of Doctor of  
Philosophy.**

**Department of Educational Administration**

**Edmonton, Alberta**

**Spring, 1997**



**National Library  
of Canada**

**Acquisitions and  
Bibliographic Services**

**395 Wellington Street  
Ottawa ON K1A 0N4  
Canada**

**Bibliothèque nationale  
du Canada**

**Acquisitions et  
services bibliographiques**

**395, rue Wellington  
Ottawa ON K1A 0N4  
Canada**

*Your file Votre référence*

*Our file Notre référence*

**The author has granted a non-exclusive licence allowing the National Library of Canada to reproduce, loan, distribute or sell copies of his/her thesis by any means and in any form or format, making this thesis available to interested persons.**

**The author retains ownership of the copyright in his/her thesis. Neither the thesis nor substantial extracts from it may be printed or otherwise reproduced with the author's permission.**

**L'auteur a accordé une licence non exclusive permettant à la Bibliothèque nationale du Canada de reproduire, prêter, distribuer ou vendre des copies de sa thèse de quelque manière et sous quelque forme que ce soit pour mettre des exemplaires de cette thèse à la disposition des personnes intéressées.**

**L'auteur conserve la propriété du droit d'auteur qui protège sa thèse. Ni la thèse ni des extraits substantiels de celle-ci ne doivent être imprimés ou autrement reproduits sans son autorisation.**

0-612-21654-3

**University of Alberta**

**Library Release Form**

**Name of Author:** Lynda Gertrude Mitchell Workman

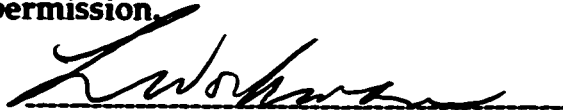
**Title:** The Birdwood Conversations: Illuminating a  
Practice of Interpretive Inquiry

**Degree:** Doctor of Philosophy

**Year this Degree Granted:** 1997

Permission is hereby granted to the University of Alberta to reproduce single copies of this thesis and to lend or sell such copies for private, scholarly, or scientific research purposes only.

The author reserves all other publication and other rights in association with the copyright in the thesis, and except as hereinbefore provided, neither the thesis nor any substantial portion thereof may be printed or otherwise reproduced in any material form whatever without the author's written permission.



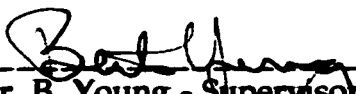
879 Raymer Road  
Kelowna, BC  
V1W 1J7

March 24, 1997

**University of Alberta**

**Faculty of Graduate Studies and Research**


The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research for acceptance, a thesis entitled THE BIRDWOOD CONVERSATIONS: ILLUMINATING A PRACTICE OF INTERPRETIVE INQUIRY submitted by LYNDIA GERTRUDE WORKMAN in partial fulfillment of the requirements for the degree of DOCTOR of PHILOSOPHY.

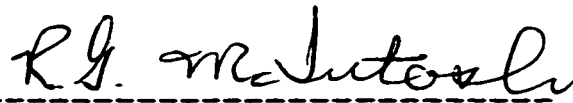
  
-----  
Dr. B. Young - Supervisor

  
-----  
Dr. V. Bergum

  
-----  
Dr. D. J. Clandinin

  
-----  
Dr. J. Ellis

  
-----  
Dr. S. Gibson

  
-----  
Dr. G. McIntosh

  
-----  
Dr. L. LaRocque (External Examiner)  
Simon Fraser University

Dated: February 28, 1997

## **Abstract**

**This inquiry arose from my experience in organizations and my recognition that knowledge obtained from conventional evaluation practices did not result in change. Consequently, my colleagues and I, in our evaluations of programs in health and social service agencies, oriented our practice within fourth generation evaluation (Guba & Lincoln, 1989). We acknowledged our uncertainties and shared interest in probing the nature of inquiry relationships within an interpretive world view.**

**Our inquiry, an intentional study of our own experiences of our evaluation practices, influenced significantly by phenomenology and fourth generation evaluation, was carried out over a twelve month period in two phases. Insights and themes which emerged in Phase 1 generated the focus for Phase 2.**

**Key learnings from the inquiry were:**

- Relationships are the work of each inquiry. Within a notion of mutual relationships, the self of the inquirer is fully engaged.**
- Within the inquiry relationship four features of trust emerged: trust is oriented to the future; trust moves around; trust is about not being wounded; and trust is about doing what you say you will do.**

- Each conversation contains a complete process. All the elements of the process are present both in across every conversation that takes place.

- The process that underlies each conversation is characterized by: discerning what is personally important to participants; the four dimensions of necessary confusion; the act of making meaning; and reflection-in-action. By attending to these underlying features which are always present, it may be possible to expedite inquiries.

Two other noteworthy learnings were: writing is intended to reflect the memory of the experience and must be immediate to the experience itself; and there are but two chances to generate a collective interpretation.

The experience of this study highlighted the difficulty and complexity of working within mutual inquiry relationships. As well, a new concept of working with the evaluative process was created.



## **Acknowledgments**

**This study begins in the experiences of people with whom we have worked. It was their openness and willingness to learn with us within an interpretive inquiry practice that illuminated the way.**

**Knowing that meaning and learning emerge through the dialogues we enter into with others, I am profoundly appreciative for the people who have joined with me in seeking to understand the experiences contained within "The Birdwood Conversations."**

**To my amazing colleagues, Barbara, Ruth and Louise who willingly revealed themselves so that we could learn. And to wonderful Tish who supported us throughout.**

**To my advisor, Dr. Beth Young who embraced and actively demonstrated that learning and action arise through mutual relationships.**

**To my supervisory committee members, Dr. Jean Clandinin and Dr. Vanjie Bergum who embodied critical comment within supportive relationships.**

**To my external examiner, Dr. Linda LaRocque whose thoughtful review and active participation in the final conversation demonstrated the very essence of dialogue.**

**To my examining committee members, Dr. Julie Ellis, Dr. Sue Gibson, Dr. Gordon McIntosh, and Dr. Sue Scott (chair), who participated in deepening my understanding through their careful and reflective review and evocative questions.**

**To my husband, Dr. Bill Workman from whom and with whom I have learned that all is possible through loving and caring relationships.**

## **Table of Contents**

<b>Prologue: Turning My Gaze Toward Program Evaluation</b>	<b>1</b>
<b>Chapter One: Necessary Confusions</b>	<b>8</b>
Introduction	8
Beginnings	9
Fragments of Myself	10
Themes of Myself	11
Moving Toward an Interpretive Paradigm	14
Learning from Administering	16
Our Inquiry Practice	17
The Effort of Dialogue in Conflicting Paradigms	21
The Urgent Need for Support	26
The Project Begins	28
The Group- Barbara, Louise, Ruth, Lynda	28
Emerging Design	30
Phase 1- January, 1995- August, 1995	31
Phase 2 - September, 1995 - November, 1996	31
Assuring Quality	32
<b>Chapter Two: A Search for Order: Methodology</b>	<b>35</b>
Seeking Clarity within Uncertainties	35
Methodological Perspectives	35
Tyranny of Methodology	39
Philosophical Influences and Interpretation	41
Phenomenology	42
The Self	45
Fourth Generation Evaluation	46

## **Chapter Three: Beginning Understandings: Learnings from Phase**

<b>1</b>	<b>48</b>
<b>Introduction</b>	<b>48</b>
<b>Analysis and Interpretation</b>	<b>49</b>
<b>A Transformative Jolt</b>	<b>50</b>
<b>Becoming Three</b>	<b>56</b>
<b>Learnings from Phase 1</b>	<b>60</b>
<b>And Having a Life, Too</b>	<b>60</b>
<b>Boundaries</b>	<b>62</b>
<b>The Nature of Inquirer Relationships.</b>	<b>63</b>
<b>Taking our Lives Seriously</b>	<b>63</b>
<b>Being Real</b>	<b>65</b>
<b>Mutual Engagement</b>	<b>68</b>
<b>Trust</b>	<b>73</b>
<b>Sustaining Diverse Voices - Hanging on to What's</b>	
<b>Important</b>	<b>75</b>
<b>Meaningful Conversations Depend Upon What is</b>	
<b>Important for Participants</b>	<b>76</b>
<b>Disruption as a Feature of Process</b>	<b>80</b>
<b>Decisions from Phase 1</b>	<b>82</b>
 <b>Chapter Four: The Birdwood Experience</b>	 <b>85</b>
<b>Introduction</b>	<b>85</b>
<b>The Birdwood Conversations</b>	<b>85</b>
<b>Context - Settling into Birdwood</b>	<b>87</b>
<b>Session One</b>	<b>88</b>
<b>Focus: Understanding What's Important</b>	<b>88</b>
<b>Emerging Themes</b>	<b>89</b>
<b>Sharing What Was Important</b>	<b>89</b>
<b>The Dilemma of Language</b>	<b>90</b>
<b>The Struggle of Being in the Moment</b>	<b>91</b>
<b>True to Self</b>	<b>91</b>

Process Matters	92
Confusion of Diversity	93
Reflections	94
Session Two	95
Focus: Movement in the Dialogue	95
Emerging Themes	95
Role	95
Barriers to Movement	96
The Importance of Reflection	99
Values Underlying Practice	99
Reflections	100
The Topic Arises Through Reflection	101
Session Three	102
Focus: Examining an Experience of Process	102
Emerging Elements of Process	103
Elements of Relationship	104
Elements of Role	108
Reflections	111
The Topic Arises Through Reflection	113
Session Four	113
Focus: Naming Practice	113
Emerging Theme	114
Collaboration	114
Reflections	115
Session Five	117
Focus: Trust is More than What Appears	117
Emerging Themes	118
Getting Trust	118
Competence-Based Trust	119
Personal Trust	119
Reflections	120
Session Six	121

<b>Focus: Everything Happening at Once</b>	121
<b>Emerging Theme</b>	123
<b>Weaving Together Data Collection and Interpretation</b>	123
<b>Reflections</b>	125
<b>Session Seven</b>	127
<b>Focus: Writing</b>	127
<b>Endings</b>	129

## **Chapter Five: Learnings from the Birdwood**

<b>Conversations</b>	130
<b>Introduction</b>	130
<b>Learning About Relationships</b>	130
<b>Relationships are the Work of the Inquiry</b>	130
<b>Qualities of Our Inquiry Relationships</b>	132
<b>Trust</b>	133
<b>Trust is Oriented to the Future</b>	134
<b>Trust Moves Around</b>	135
<b>Trust is About Not Being Wounded</b>	136
<b>Trust is About Doing What You Say You Will</b>	136
<b>The Self of the Inquirer is Engaged</b>	137
<b>Learning About the Meaning of being 'Anchored' in the Work</b>	138
<b>Learning About the Meaning of Process</b>	140
<b>Each Conversation Contains a Complete Process</b>	141
<b>Learning about the Elements of the Inquiry Process</b>	142
<b>Discerning What's Important</b>	143
<b>Necessary Confusion</b>	145
<b>Diversity of Participants' Meanings</b>	145
<b>Disequilibrium is Necessary for Learning</b>	146
<b>Sharing Confusion/Uncertainty</b>	146
<b>Conceptualization</b>	146
<b>Making Meaning</b>	147

<b>Reflection-in-Action</b>	<b>148</b>
<b>Learning about Writing as Memory</b>	<b>150</b>
<b>Learning about Inquiry</b>	<b>152</b>
<b>About Emerging Designs</b>	<b>153</b>
<b>About Interpretation</b>	<b>153</b>
<b>About Collaboration</b>	<b>155</b>
<b>Seeking a Setting for Interpretive Inquiries.</b>	<b>157</b>
<b>The Final Birdwood Conversation - An Illustration</b>	<b>158</b>
<b>The Anchor: Writing</b>	<b>159</b>
<b>Understanding What's Important</b>	<b>159</b>
<b>Being Disrupted</b>	<b>162</b>
<b>Making Meaning- Clarification</b>	<b>162</b>
<b>Reflection</b>	<b>163</b>
<b>Relationship-Based Inquiry</b>	<b>165</b>
<b>Writing - the Focus</b>	<b>165</b>
<b>Reflections Again</b>	<b>168</b>
<b>Addressing Barriers</b>	<b>170</b>
<b>Chapter Six: Pulling the Learnings Together</b>	<b>171</b>
<b>Introduction</b>	<b>171</b>
<b>About Myself</b>	<b>171</b>
<b>Inclusion of Self in Inquiries</b>	<b>172</b>
<b>Understanding Evaluation/Inquiry</b>	<b>173</b>
<b>A Relationship-Based Practice</b>	<b>174</b>
<b>Working with Process</b>	<b>176</b>
<b>Time</b>	<b>176</b>
<b>Writing As Memory</b>	<b>177</b>
<b>Creating Intense Learning Situations</b>	<b>178</b>
<b>Inquiry Contexts</b>	<b>179</b>
<b>Limits to Our Practice?</b>	<b>179</b>
<b>Applicability</b>	<b>180</b>

<b>Could Practice be Sustained in Competitive Environments?</b>	<b>180</b>
<b>Epilogue: Living with Action</b>	<b>182</b>
<b>References:</b>	<b>187</b>



## **PROLOGUE: TURNING MY GAZE TOWARD PROGRAM EVALUATION**

**For many years, I was a manager in a public service organization that provided preventive social services to the community. To fulfill my responsibilities, I was interested in knowing something about the impact of services on clients and about how to improve overall service delivery in an effective way.**

**As a professional social worker, I had learned about what contributes to making a difference for the people with whom I worked. I had learned through my day-to-day experience, through reflection upon my practice, through participation in supervisory and peer discussions and through on-going training. I became committed to my own knowing. "Informal evaluations" (Stake, 1967) were seen as being of variable helpfulness when translating such individual understanding into meaningful organizational policies and practices. Indeed, it seemed to me that organizations dismissed the knowledge of experience as anecdotal by favouring knowledge obtained through "rational" methods based in natural science. This seemed so despite the work of Guba & Lincoln (1981, 1985, 1989) that articulated a practice responsive to practitioners and consumers.**

**My efforts to conduct formal evaluations began with attempting to understand the extent to which quality assurance had been incorporated into medical social work. I did this through a national survey (Workman,**

1979). I was interested in ways in which social work was accountable. My practice in evaluation mirrored my learning as I moved from a scientific orientation toward a naturalistic (Guba & Lincoln, 1975) approach. This led me to wrestle with naming an evaluation practice that was congruent with the philosophical assumptions of phenomenology. My unfolding practice was strongly influenced by my distaste for the limited inclusion of the client/consumer in evaluation designs and the serious gap between making recommendations and achieving their implementation (Elmore, 1978; Patton, 1978; 1984). Missing was the active realization that "There is the potential for change when people who are not accustomed to speaking out are heard by people who are not accustomed to listening" (posted on the wall of the AIDS Network, Edmonton, Alberta). Evaluation discussions seemed to focus on design choices (Fetterman, 1988; Guba & Lincoln, 1989; Smith & St. John, 1985) and the continuing debate about the mixing or matching of methods. I was concerned as well with a dominant focus on method (which is the place at which critique is pointed) rather than on what was learned. Organizational politics (Morgan, 1986, p. 154), and the need for negotiation between competing or divergent interests (Lincoln, 1986), inevitably had an impact on all aspects of evaluations. I remain convinced that any organizational vision or mission founded in concern for others is ultimately displaced by the intrusion of organizational politics. Becoming acquainted with learning about the paradigm debate (Guba, 1990) offered me key insights to light my way through the confusion of evaluation practice. Phenomenology, the study

**of lived experience (Van Manen, 1990) was particularly helpful as an approach for obtaining meaningful results.**

**My learning and practice of program evaluation within an organization was fraught with complexity: management-driven evaluations elevating staff fears; staff reluctance to participate in evaluations resonating with an experience of dismissal of experiential knowing; management need to 'prove' something as opposed to 'learning' from something; marginalization, if not the exclusion, of the voice of the client, and the difficulty of implementing meaningful negotiation (Lincoln, 1986) given the various power differentials between stakeholders.**

**I was driven to turn my gaze toward a deeper understanding of program evaluation by more than the challenges emerging from the workplace. I was also driven by what seemed like a life-time of experiencing evaluation as something painful, dismissive and wounding: my childhood experience of my father's frown; or the agony of having supervisors who insisted that policy, rather than human suffering, guided action; or organizational life which judged, yet excluded, the client voice. I experienced evaluation as judgement of merit and worthiness. Despite the coloring of judgement with positive words, I was consciously braced for the large "but" that was looming in the wings. What followed the "but" assumed centre stage and inevitably left me with a sense of being found wanting. I knew from my own experience of evaluation why it was feared by staff and why policies were not implemented (Workman, 1992).**

**Yet, I had also tasted another other side - the life-giving experience of learning with others in a spirit of equality. This experience of learning resulted in change for me as well as for the other participants which was demonstrated in improved services. I wondered about how I could develop an evaluation practice grounded in the philosophical ideals of an interpretive or constructivist paradigm and phenomenology. While the word "inquiry" was creeping into my language, I was aware that I was seeking ways of working within the taken-for-granted understanding of evaluation that ultimately involved making judgements about merit and worth.**

**I was not alone in my learning struggles. Three women colleagues joined with me to study our evaluation practice as a dissertation project.**

**What follows here is a story of four women intentionally studying our experience of carrying out numerous evaluations within an interpretive world view. Our story is also the story of each of our evaluations. Evaluations begin in confusion as people come together to make meaning of a context, of themselves within that context and of their questions of interest (Chapter One). Clarity and order through the initial confusion is sought through considerations of methodology and selecting an approach for yielding understanding (Chapter Two). In this Thesis Inquiry Project, there were two distinct periods or phases of experience from which learning emerged. The first phase (Chapter Three) provided the foundation for the second and major experience of this project, the Birdwood Experience (Chapter Four). Chapter Three includes an**

interpretation of my experience, the learnings which emerged and the decisions which were subsequently taken. Chapter Four contains my interpretation of the Birdwood Experience. Learnings from the Birdwood Conversations are presented in Chapter Five. Pulling the threads of my learning together to respond to the questions, what difference has my learning made to me, to my understanding of evaluation, and to my practice is discussed in Chapter Six. The Epilogue offers my concluding thoughts and opens a doorway to my practice following the Birdwood Experience.

At the end of our experiences of the Thesis Inquiry Project, Ruth, Louise and I felt that we had arrived at a place of insight and altered practice.

*Ruth: We are more animated as we move to an experience-based conversation. I have a feeling that the pieces of practice are becoming much more whole. It's not about pieces of practice, rather it's about a process applied to all facets. It's compelling, convincing and validating for all of us because we can see how the different things we bring are congruent and of equal importance.*

*Louise: I feel energized by the common desire to understand why we are here. I'm touched by Ruth's observation of my position in the group. The level of engagement leaves me in my tears of excitement.*

*Lynda: We've got it! And now the self-doubt. Maybe what we've understood*

*is already known! It doesn't seem so difficult. It's so easy now! We really have had an experience of getting what is needed in the moment. I can believe and trust in this process.*

Learning is intensely personal: my story, our collective story, the story of all participants in any inquiry project, is necessarily one of personal change and action. The writing, then, becomes a memory of that personal journey. Even with the legitimization of "arts-based" research (Barone & Eisner, 1995, p. 1) at the level of theory, in which such elements as vernacular language and the promotion of empathy are essential, I do not find it easy to tell my story. Sharing personal journeys of learning is one thing when talking to people I know, but to write to you, the unknown stranger, is profoundly difficult. A year ago I would have said it was impossible for me to do. I would be mediating my words, cleansing them with the brush of previously held assumptions about academia, sparing myself the remembered pain of judgment which speaks to my feelings of inadequacy and incompetence. I would moderate my voice and speak softly so as not to arouse deeply sleeping pains which I knew, in my body, were there but which I was afraid to arouse. I would use great caution with my words to obscure deep feelings and offer a cover story (Clandinin & Connelly, 1995) that might satisfy you. How much easier it would be for me to write an abstraction of my experience following a prescribed pattern, marked by phases, with all the orderliness of a straight line! I have come to accept, however, that in telling my story

**of my experiences, it may resonate with you, the reader, contributing toward our shared understanding and improved practice of inquiry.**

**You and I know that learning is never ended, that in each moment of dialogue are the seeds of the next dialogues. And for me, this was completely true, embedded as I was and am in my continuing practice as a learner inquirer. Nevertheless, with the understanding I attained through the Thesis Inquiry Project, I was changed and my practice was dramatically shifted. This is a story about what I and my colleagues learned.**

**I call our story, "The Birdwood Conversations."**

# **THE BIRDWOOD CONVERSATIONS: ILLUMINATING A PRACTICE IN INTERPRETIVE PROGRAM EVALUATION**

## **CHAPTER ONE**

### **NECESSARY CONFUSIONS**

#### **Introduction**

**We call our learning "The "Birdwood Conversations" because it was at the Birdwood Bed and Breakfast, nestled in a forest outside of a city, that my colleagues and I experienced a startling breakthrough in understanding the nature of our inquiry practice. Surrounded by peace and nurtured by the Innkeeper, we awakened to an understanding that was completely unexpected. For a year, we had been intentionally delving into the murky depths of our experience as inquirers in interpretive program evaluation, a practice framed within the notions of a constructivist (Guba, 1990) or interpretive (Holstein & Gubrium, 1994) worldview. We were hopeful that through an understanding of our lived experiences of inquiries, the underlying structures of our experiences could be identified (Van Manen, 1990).**

**Birdwood was the culmination of our collective experiences and learning in this project. Our journey toward Birdwood had begun much earlier.**



## **Beginnings**

**My colleagues, Ruth, Louise, Barbara and I were working in our community in the field of evaluations. Louise and I worked together in a public sector organization while Ruth and Barbara were private practitioners contracted to carry out evaluations for different health and social service agencies. Our paths crossed as we walked about our community and from time to time, we would meet informally to discuss our work. In the fall of 1993, I left the organization. Louise and I then embarked into private practice focusing on an evaluation practice grounded in phenomenology. The four of us began to meet much more regularly out of a rather desperate need for support as we were exploring and carrying out evaluations that were somewhat outside of a conventional understanding of evaluation.**

**All of the projects in which Ruth, Barbara, Louise and I were engaged, were situated in the health and social services community, were publicly funded and were concerned in some way with the difference that program activities were making to clients. Some specific projects were: understanding what difference aboriginal spiritual and cultural events made for women in trouble with the law (Gendreau & Workman, 1995); developing a model of support for people living with HIV and AIDS (Sykes & Wolfe, 1995); a needle exchange program for drug users (Wolfe & Gendreau, 1996). Other projects were concerned with the accessibility to public health services by aboriginal people, naming a nursing outreach**

practice to inner city residents and the development of a resource centre for prostitutes. It is important to note here, that while some of our earlier projects included men, all of the participants in the projects in which we were involved at the time of the Thesis Inquiry Project were exclusively women.

Together, we represented formal educational training at the Masters and Ph.D. levels, three to ten years' experience in evaluation practice, and work histories that reflected both private consulting and membership in and management of, formal organizations.

### **Fragments of Myself**

Who was I as I entered into the Thesis Inquiry Project? I was surprised, very surprised to find myself working with other women as an inquirer in carrying out evaluations. It was not an image of myself that I had ever contemplated. How did I get there?

I can not find a moment or an event in my life that could mark a precise beginning for the work I am doing today. Rather, I became aware that the threads of my story were entwined in the tangle of my history, experienced uniquely by myself and in the collective history of my family and culture (Carr, 1991, p. 5): growing up in the quietude of the 1950's, living within the protection of a small, isolated city, in a Protestant, anglo-saxon family; father as earner, mother as creator of the family nest and me between two sisters. The essence of being a woman was absorbed through

a favorite childhood story "Bambi" with Thumper's voice echoed in my mother's repeating words; "If you can't say anything nice, don't say anything at all." For now, I gather fragments of myself into a collage from which, as Smith (1994) would say, I can create a "deepening a sense of our [my] own interpretation so that our [my] habitual patterns are disturbed" (p. 5).

### Themes of My Self

*And I am not alone. This I can say with an inexpressible sense of relief. I have felt the burden of learning alone. It does not seem so long ago, although it is more than a quarter of a century, that I left my small 'up-country' town to attend a 'big city' university. I did not know anyone in the dorm. I did not know anyone in my class. I sat by myself, I followed the instructions, I did my assignments. I did not talk with anyone. I created a cocoon in which I did my work. There must have been times when I was excited by ideas but I do not really remember. What I remember was the uncertainty, floundering in a sea of meanings, the isolation of my thoughts, unshared. Nervous. Always seeking to find 'the right' answer. I completed four years of university and did not speak to a professor, not once. It was not invited and I could not ask. This emptiness of disengaged learning remains with me still. (Thesis Proposal draft, 1994)*

To be learning with others in uncharted waters, readily acknowledging our uncertainties was a gift to be eagerly grasped. I was

thankful to be connected with others in a spirit of support. In unwrapping a gift so eagerly grasped, I became more attuned to the reservations within myself. I became aware of my preference for maintaining some distance in relationships rather than risk the possibility of discord.

*In relationships, I feel the distance. The inquiry process is one of connection. How will I overcome the distance if the other doesn't choose to reveal themselves? How does this affect the work? How does the relationship affect the change process? And now that I am aware of the distance, it must be raised if one is honoring the process of connectedness? I am aware that I do not want to. It will create conflict and 'not nice' feelings. Will I then be judged and dismissed? I am aware of my own urge to judge as I have been judged. (Personal Journal Entry, 1994).*

*My feeling in the silence was that I hadn't got it right. How this theme dogs my steps (Personal Journal Entry, 1995).*

At the same time that I recognized some inner fears, I also was aware of my hunger for an ideal notion of relationships packaged almost wondrously as intertwined relationships of mutual learning in a process of easy flow between learners (Lincoln, 1988).

***This is what profoundly animates me: understanding myself and the other such that our capacities are strengthened and our spirit freed to create meaningful lives together in a social community. (Thesis Proposal, 1994)***

**How would it be possible to achieve such relationships within inquiry projects?**

### **Moving Toward an Interpretive Paradigm**

**As I grappled with the challenges of evaluation within human service organizations, I became entangled in the familiarly held conventions of evaluation protocols and the rigid observance of designs based in natural science. Thus, evaluation designs which could assure credibility through validity, generalizability and statistical significance were supported. Designs based on lived experience were dismissable as anecdotal and/or of insufficient numbers to be credible or respectable. Evaluations were designed by professionals within the organization, addressing questions determined by the organization, and decisions resulting from the information were made by the organization's leadership. The most successful implementation of recommendations that I ever encountered was when expanded services were recommended! More often, evaluation reports were presented and moved to future agendas for discussion. The report quickly faded from everyone's memory. The organization continued to turn in its comfortable pattern.**

**I remained confounded by how to implement information obtained through quantitative methods. Such information was not meaningful for understanding and acting upon what it was that made a particular difference for someone who had received service in their particular life. Organizations were good at collecting descriptive information such as: how many people were served? over what period of time? for what purpose? were clients satisfied? In the end, I was stuck in 'old' knowledge gained in years past. I needed further learning, thus, I began formal study in program evaluation.**

**Back in class and on a reading list was an article, "Negotiating Politics in Organizational Cultures: Some Considerations for Effective Program Evaluation." (Lincoln, 1988). I remember so clearly my first reading of Lincoln's paper. She so easily named what was getting in my way of effective evaluations: the need to recognize and validate "multiple constructions and multiple realities"; "the influence of power differentials" and the "role of politics." Lincoln affirmed evaluation as a "social-political process" to "produce change" and evaluation as "a collaborative, transactional and negotiated process engaged in between equals." I was so energized and excited by her words. I could see the limitations of our practice of pre-designing evaluations and selecting methods as if we were painting by numbers (Patton, 1990; Smith & St. John, 1985).**

**I always seem to remember my grand failures best! On the heels of reading Lincoln's words and with great enthusiasm and animation, I initiated a meeting with key stakeholders, representing power**

**differentials, to talk about an evaluation project identified by line staff. I didn't even pause for breath or to think through how to introduce what seemed so perfectly clear and straight forward! It was like talking to a line of male sphinxes; passive listening, blunt critique, a rather patronizing shaking of heads, and refusal to participate in or support the ideas. We proceeded with the project anyway. Not surprisingly, the result was significant personal learning about evaluation for the participants and useful knowledge for us about the service being examined. The information and recommendations contained in the report were not responded to in any way by the organization. We had been working in a glass bubble, visible but unheard.**

**I continued to struggle with the tension between what I was learning and what seemed possible within an organization. I knew in my heart, mind, body and soul that we were ineffective in understanding and responding to what made a difference to clients at the systems level. Informal knowledge which was often a feeling, sensing, intuiting knowing was relegated to some back room. Formal knowledge, the rational, logical, intellectual knowing was ascendant in its certainty. I had ideas for change but I could only offer the inarticulateness of myself and I did not feel received.**

**It was not until I literally bumped into phenomenology that I began to see another way. Phenomenology offered a process that valued the totality of my experience and the experience of others in such a way that possibilities for creating meaningful information to be acted upon were**

**opened up. It was a moment of joy for me. Within a process of emerging understanding, and upon which structures common to the universal human experience could be derived, there was generation of meaning, learning and action into a continuous spiral of improvement and change. These are essential components of program evaluation. I now had a direction which resonated profoundly with my new understanding.**

### **Learning from Administering**

**In traveling my road of learning in evaluation from informal understandings to naming a practice of inquiry based upon lived experience, I was also traveling an administrative route. My learnings in these two areas followed the teachers of the day.**

**I learned by doing and so with each new learning gleaned, I applied it within my organizational responsibilities. I found that as I was becoming attuned to an interpretive worldview, I began to focus on organizational strategies which manifested this view: a focus on human interaction such as participation, communication and involvement (Morgan, 1984), stewardship (Block, 1993), empowerment and commitment (Kernaghan, 1991; Walton, 1985), partnerships which include customer participation (Kanter, 1983), transactional and transformational leadership (Gordon, 1991) and learning (Heider, 1985; Senge, 1990). I was becoming aware that current knowledge and ideas about effective**



**organizations supported a context and climate for an interpretive program evaluation inquiry practice.**

**My last formal organizational role was as a senior manager with a small team of people. A change in organizational focus required that a group of social planners become program evaluators. This, then, was the setting for beginning to name an inquiry practice based upon an interpretive worldview. Together, this small team experienced the power of equality and mutuality, the excitement and energy contained within shared learning and the freedom, for a brief time, to act upon our learning.**

**It seemed to me that what we could learn from program evaluation grounded in interpretivism was intertwined with substantive organizational change. Designing a practice on this basis was in the beginning stages when I left the organization. My thinking and practice continued along these lines outside of the organization through my private practice with Louise, Ruth and Barbara.**

**These are the key fragments of myself which I brought into the Thesis Inquiry Project.**

### **Our Inquiry Practice**

**We were familiar with and deeply influenced by the features of responsive or fourth generation evaluation. This approach is characterized by an interactive and negotiated process among equals, the researcher as a primary research instrument and evaluation designs which**

are emergent (Guba, 1978; Guba & Lincoln, 1989; Lincoln, 1986). Fourth generation evaluation is also a practice which "seeks not so much program understanding as social change-oriented action, and the fourth generation evaluator's role is not so much one of transcriber and consultant as one of negotiator and social change catalyst" (Greene, 1994, p. 540). The evaluation process and the generation of meaning are dependent upon the relationships which are created between and among the evaluation participants. "Findings are literally the creation of the process of interaction" (Guba, 1990, p. 27). Conversations become "opportunities for interdependent and mutual learning . . . moving between the roles of teacher and learner, teaching each other about the world they inhabit, and how they make meaning of those worlds" (Lincoln, 1988, p. 48).

We asserted that an effective practice begins with congruence at the paradigmatic and strategy levels, as strenuously argued by Guba (1990) and Lincoln (1990). We did not accept the perspective that method is about quantitative or qualitative strategies which can be "mixed and matched" (Patton, 1990). Rather, we agreed with Lincoln:

The socialization processes associated with each paradigm are sufficiently divergent, and the emotional and political commitments so high, that a mix and match strategy, at either the axiomatic or the practical level, is likely to produce little more than internal dissonance in the research process, a form of discursive incoherence that renders the findings useless for both camps. (1990, p. 81)

**We also gathered into our practice the following shared set of values and principles:**

- learning is guided by the experience and voice of the recipient of service**
- the evaluation inquiry is conducted in a spirit of learning which recognizes all voices are valid and necessary**
- differences are valued and appreciated, knowing that all experience has something to contribute to our understanding**
- there is willingness to learn from the unexpected**
- there is willingness to disrupt our own certainties**

**Perhaps an experience of our work is best portrayed by Emma's story. Emma contracted Louise and I to evaluate a pilot project in which she and a colleague provided an outreach nursing service to people living in the inner city. This is Emma's story as she told it to me.**

**I found the experience profound and wished that the evaluation could have been started at the beginning rather than at the end of the pilot. I learned so much through sharing. A kind of sharing that required me to be vulnerable and to take risks. The vulnerability is the feeling but the action builds an opportunity. Someday I want to be wise but how can I be wise if I don't share and receive feedback?**

**I've never before felt so listened to and understood and then you took my concerns a step further and helped me to make sense of it. We created a larger meaning. I am reminded again that the sum is greater than the individual parts. I felt valued by your comments, the words used in the development of each draft, the time we spent talking about the different issues. For me, it's really about the 'getting together' part. You were here more than physically, your being was here. It was the free expression of feeling, to be real and not to pretend. It was a real interchange that felt alive and pertinent. You would share examples from your life outside. You would share yourself, your learning and struggles in the project. There was never a sense of you know and I don't. I had a sense of equality. None of this power differential. We both shared our uniqueness, our vulnerabilities. It felt like the relationship I have with clients. You share yourself but you make choices about what to share. We were living it together and everything was real.**

**The style of research made a profound difference. The painful struggle was expressed positively which allowed for learning. The active support, so intensely involved in the feedback, brought trust and support. That's where the learning began.**

**What I learned through this experience transformed me and my practice. It was the first time that I experienced evaluation as other than an assessment of rules we have to follow. It was about me, how I felt and thought. I could reflect on the themes which has increased my awareness and deepened my questioning about other things.**

**It was the most exciting learning I've ever done.**

**The qualities of relationship within an inquiry practice which created learning for Emma also paralleled our experience with her. We too, were able "to be vulnerable and take risks," to feel heard and understood," "to create a larger meaning," "to be real," to feel "equal," to offer and receive support. We too, were excited by our learning. I remember so clearly, the day Emma, Louise and I took an outline of learnings to a larger meeting of Emma's colleagues. There was interest around the table until the senior manager asked a question, "How many people did you interview?"**

### **The Effort of Dialogue in Conflicting Paradigms**

**Emma's story of her experience with us was affirming. Her words of experience and those of others who have been participants in our projects have given us encouragement that we, in our way of working**

together, could generate meaningful and relevant understanding which would move us all to action.

Emma's story was one side of experience. There was another. As practitioners, we were pushing against the door of familiar understandings of evaluation common within our community: concepts of neutrality, objectivity, the evaluator as distant observer, "to be the dispassionate observer and not the passionate participant" (Lincoln, 1990, p. 86). It was heavy work, oppressive. I often felt burdened by a weight I could not throw off.

Credible knowledge was largely seen as contained in results which were quantifiable and generalizable. Experiential knowledge (often named as 'anecdotal' ) was regarded as helpful - at best - as it pertained to supporting quantifiable results. The critique of Heuristic Research by Moustakas (1990) offered by O'Brecht (1991) is reflective of a dominant attitude when he wrote, "While the work is unlikely to be of practical use to evaluators of programs or projects, it may be of interest to psychotherapists or others working in areas where people interact on a personal and emotional level" (pp. 130-131). Closer to home, in the Edmonton Journal (1996) commenting on, "Listen To Me" (1996), the report of the Quality of Life Commission which conducted extensive conversations, focus groups and briefs across the Province to understand the impact on people of the changes in the social assistance program, the Journal stated "Based on anecdotes rather than statistics, the report made

40 recommendations. . . " (p. A7). In one sentence the effort and the learning was dismissed. One example, only, of a familiar refrain.

There was also the challenge of working in a way that demands creating and sustaining relationships which are full of the wonder of mutual learning and movement. It was easier to adopt an ideal than it was to carry it out. The effort to be engaged in conversation, to hear and understand another and to suspend judgment requires a willingness to be open to the possibility of revising one's own deeply held views. Appreciating that it is the effort we make to shatter our familiar knowings that creates the possibility for revising our understandings, it is still a demanding journey to create and sustain meaningful relationships.

Within the experience of our projects, we were compelled to pay attention to the dilemmas which were constantly presented. It was hard to find a way to talk with people oriented to another view of evaluation.

*Barbara: You know in some ways, it might be a good thing if they sort of proceeded this way and we did not try to influence them to go in another direction. I think there will be some real learning there about why this kind of evaluation is not going to give them the understanding and the learning, that they say they need to get. They will recognize that.*

*Lynda: I am not very good at having that conversation to help them understand, to help them move and hear in a way that they can understand. So it is a conversation at the margins and I don't feel very able. You can't answer from a*

*quantitative mind set. That would be somehow incongruent with the value base of a social constructive reality - it just does not match. We have talked about this before, where I feel there is a need to balance how much struggling you can do at any one time. How many projects do you want to struggle on at once. Because it is a struggle and it is very strenuous, it is hard work.*

*Barbara: This whole idea of trying to convince people somehow, that seems to me to be what a proposal is about - trying to convince them of the value of our approach. I am not sure that is a really good use of our time. I mean some people are convinced and you can have the conversation and sort of move into a piece of work without all that kind of struggle.*

*It was difficult to assure competence when it was hard to establish a climate in which diversity could be given "the benefit of the doubt."*

*Louise: I experience most discomfort in the environment where professionals say, 'before I accept you, you have to speak my language'. The stranger, the outsider, the one who is different, has a different way, will think differently, so it will necessarily be confusing because you are not familiar with the stranger's way of thinking. I was wanting to offer from the more human level. Why did I feel blamed for that? I could have responded in an academic way, which is to say I have to now think the way you think before you will let me in the door again. Well, the reality is I won't come back. That is why there is no access. You can't*



*be accessible because you are required to be other than who you are before you come in the door.*

**And then there are own complexities of living and learning our personal journeys.**

*Lynda: Maybe that is why I got sort of upset and was tearful when she said to me about the language not being good enough. Then I felt for the first time a feeling of "I am back in the mode of having to get it right" and that was not the intent. And maybe that is at the root of this whole notion of my fear or my feelings about the lack of competency.*

*Louise: And that is where there is pain.*

*Lynda: There is pain and no mutuality. Without mutuality this kind of work does not really work because you are back in traditional kinds of stuff. And so mutuality requires self-worth. I came away from the meeting feeling that the meeting had been hijacked. I was really upset with myself because I did not claim my voice. I allowed myself to give up my place. We just don't hire on as a hired gun to do this project, or that project and just whip them off. We are talking about a different kind of practice that triggers who we are which means that the evaluation process requires a way to deal with that.*

## **The Urgent Need for Support**

**While we were connected by our need for mutual support, our individual needs were unique to each of us. I found it a struggle plowing through the mud of my own uncertainties in confronting firmly entrenched views of evaluation. I intuitively knew that an interpretive understanding of the human world and a practice congruent with this understanding, held the possibility for creating meaning and immediate action toward personal, program and agency systems change. I also knew from my organizational experience that knowledge obtained through conventional evaluation practice did not result in change. However, I did not have the clarity of thought or words to be confident in myself or compelling enough in conversation with others to illuminate another kind of practice. And I also had to struggle with myself to drag my remaining foot caught in the safety of my habitual patterns for carrying out evaluation and managing within organizations. I needed to be able to stand comfortably and confidently with meanings which emerged through "the interpretive, creative, and subjective nature of personal and social reality " (Husband & Foster, 1987, p. 52 ), without defensiveness. I was stumbling about in my confusions. I needed support.**

**Ruth expressed her need this way.**

***I think that it was both intuitively and experientially that I knew that an interpretive understanding held possibilities. I knew that reports didn't make***

*change, rather, the people involved in evaluation needed to make the change. So I was able to articulate some of the qualities that I thought were important to participatory, change-oriented processes. I think that in relation to stumbling about in my questions, I was also interested in anchoring our role, that set us apart in terms of how we were seen in the work we were doing; not having to always defend being different than what was expected. . . .*

**Louise offered her experience.**

*For me it is the pain of being an outsider to a body of legitimized knowledge that was an important theme in my story of inquiry. For me, an interpretative paradigm was a whole different way of thinking that is tied to a way of living life. I was frustrated with all the literature on the interpretative paradigm because it was still separate from life. So for me, coming together was an opportunity to become more self aware with like-minded individuals hence my excitement! For the first time I was not talking with those that understood about the interpretative paradigm literature, or the study of your interaction which is still the study of it; rather it was engagement and a whole different level of self awareness is possible.*

*I experienced a sense of wonder about our coming together.*

**Barbara could say:**

*My need for support was more a personal thing, a sense of being included, of being supported in the contractual work we were doing together.*

While I have talked about 'our practice' as if it was a congruent practice, that was not really the case. We were collected by similar values, and a similar orientation to evaluation but we came together as individuals needing support and wanting to work together.

### **The Project Begins**

#### **The Group - Barbara, Louise, Ruth, Lynda**

Our initial support for each other arose through a need for camaraderie, a sense of belonging, of being included and being able to talk about our work without a feeling of defensiveness. Our personal knowledge of each other was varied. Louise and I had worked together within an organization and also very intensely on contractual evaluation projects. Ruth and Barbara had worked together on numerous evaluation projects over a period of years. Ruth and I had known one another as colleagues and neighbours for fifteen years. Louise was as much a stranger to Ruth and Barbara as I was to Barbara.

We were four individuals with respect for each other's experience, knowledge and training drawn together for mutual support. We valued mutuality and collaboration. Louise offered a definition of collaboration

as a willingness to work together in uncertainty. It was an intriguing possibility around which we might have oriented ourselves. We did not intentionally do so, however. Rather, in the beginning, we were collected by a ready acknowledgment of our uncertainties in the inquiries we were conducting and a shared interest in probing the nature of inquiry relationships in interpretive program evaluation.

*Louise: What it does for me is make me think of my greed for togetherness, my greed for experiencing unity. It is so passionate for me that I can't accept someone saying we don't need to be close.*

*Barbara: It's difficult for me to say what it is, to put into words but I do want to keep going with it, to keep struggling. But I think I have to tell all of you that it is a struggle. We are four different people who come to this group with different experiences. I feel I'm the only person saying that I have real difficulty about being in this group.*

*Ruth: My current experience of the group, and not just today, is a lot of excitement. Part of that is having a sense of common understanding about the difficulty of doing some of the work.*

*Lynda: I feel moved by excitement and frightened to death at the same time. That's how I feel. It's a terrible struggle for me to be in any group that is going to take on this kind of a project.*

## **Emerging Design**

**The approach to this project mirrored, in many ways, the approach taken in all of our projects.**

**The study was guided by the principles and values of phenomenology and interpretivism. The methodology arose from an understanding that reality is a social world which is continuously being constructed and reconstructed as it is experienced by individuals; that knowledge is created through the interpretations and interactions of individuals; and that understanding is elicited through a dialectic process. Naming experience, reflecting and interpreting it and seeking the underlying structures or themes of the experience, guided this study.**

**The thesis proposal highlighted a number of questions which called our attention: What was active support? What was the experience of trust? To what extent and in what way do inquirers share themselves and become vulnerable? What was the impact of role when it becomes a definition for activity? What was the process of empowerment for the inquirer? Does the inquirer experience change and empowerment in a mutual process? Is too close a relationship incestuous? What was the impact of judgments made in the context of relationships? What impact do personal capabilities to confront or avoid conflict have on creating meaning? Does one compromise, comply or leave out important information?**

**What would arise for this study could not be known in advance of experience. It seemed, however, that more data would emerge than could be managed within one dissertation, thus, a two phased approach was proposed.**

### **Phase 1 - January, 1995 - August- 1995**

**Phase 1 was intended to be an initial data gathering step to assist in focusing the study on those themes which would emerge as most relevant and fruitful for deep exploration. It was also an opportunity to learn about the interactive process and the recording of data. Meeting seven times for approximately two hours per session over a four month period, the group discussed whatever was of current concern from our projects. These sessions were transcribed. Together with my personal journal they comprised the data. At the conclusion of this period of data collection, I developed an interpretation of the data to discuss with my colleagues. On the basis of the learning from Phase 1, Phase 2 was initiated.**

### **Phase 2 - September, 1995 - January, 1996**

**Phase 2 was carried out in a retreat setting at the Birdwood Bed and Breakfast. While interpretive evaluation is carried out in the spirit of equality, particular responsibilities for me as the principal researcher were 'assigned':**

- facilitating the conversation through which shared understanding emerged; [as Gadamer (1989) said, "Dialectic consists not in trying to discover the weakness of what is said, but in bringing out its strength. It is not the art of arguing (which can make a strong case out of a weak one) but the art of thinking (which can strengthen objections by referring to the subject matter" (p. 367)];
- keeping field notes of the process;
- offering the first level written interpretation of meaning.

### **Assuring Quality**

It has become particularly important to attest to the quality of interpretive evaluations, given the struggle to overcome the dominant and prevailing beliefs about what constitutes adequate scientific procedures. Guba and Lincoln (1989) have articulated criteria for trustworthiness (credibility, dependability, confirmability, transferability) which are intended to "parallel the rigour criteria" (p. 233) of conventional methods, and authenticity criteria (fairness, educative, catalytic, tactical) which "spring directly from constructivism's own basic assumptions" (p. 245).

My concern was particularly about congruency with the assumptions of interpretivism, and thus, with the authenticity of what I learned. Authenticity arises through offering back my interpretation to my colleagues for their confirmation/ re-interpretation through which a further elucidation of meaning arises. This process of confirmation



becomes another opportunity for refining meaning and continuing conversation which seeks consensus and/ or the articulation of difference. The stimulation of action and my colleagues' ability to act upon what we learned, would further attest to the value of what emerged. We began this enterprise appreciating our experience and education yet holding ourselves open to disturbing our patterns. We were confident that, with review and re-construction of the emerging themes, knowledge would result, knowledge that we expected to act upon.

In addition to processes of authenticity, the aim of phenomenology is to "construct an animating, evocative description (text) of human actions, behaviors, intentions and experiences as we meet them in the lifeworld" (Van Manen, 1990, p. 19). Benner (1994) adds, "The role of storytelling is central to interpretive phenomenology because when people structure their own narrative accounts, they can tap into their more immediate experiences, and the problem of generating false generalities or ideologies is diminished" (p. 109). Inevitably, the authenticity of this work depends upon your experience as a reader of text. Are you stirred to think about and act upon what you have read?

The necessary confusions which arose by virtue of entering into an intentional endeavour together swirled around us: the demands of several inquiry projects, the cautious beginning of different connections with each other, the demands of different family circumstances and for me, the continued study in an academic setting. Nevertheless, we launched ourselves into this new initiative out of our need, our

**uncertainty and our enthusiasm for learning. We were hopeful that through an understanding of our lived experience, the underlying structures of our experience (Van Manen, 1990) could be identified which would contribute to a deeper understanding of ourselves and the development of an interpretive inquiry practice. We were hopeful that clarity would emerge from our uncertainties and confusions.**

## **CHAPTER TWO**

### **A SEARCH FOR ORDER: THE TYRANNY OF METHODOLOGY**

#### **Seeking Clarity within Uncertainties**

**There is a generally held expectation within program evaluation that there must be stated methodological procedures in order to systematically and credibly come to understand something. Methodology responds to our desire to live ordered lives. It is a way of ordering and prescribing the way we think, the way we act and the way we will achieve an inquiry outcome. Methodology is intended to assure the competence of the inquirer, the inquiry and the credibility of results. The literature is replete with conversation and debate as people wrestle with questions pertinent to methodology.**

#### **Methodological Perspectives**

**Several areas of concern repeatedly appear in the literature. There is the question of paradigm congruence. Some (Guba & Lincoln, 1989; Lincoln, 1990) argue strenuously for paradigm congruence. Others (Patton, 1984) suggest that methods are dictated by context and relevancy to the questions of interest. Glesne and Peshkin (1992) offer at first glance, a reasoned approach to the paradigm versus method muddle. Explicating nicely the differing perspectives of those who argue for philosophical**

**congruence and those who see benefit from mixing and matching method, they ultimately leave the 'decision' or choice in the hand of the researcher. While I agree that congruence at the personal level is an essential feature of undertaking any inquiry, it is not alone a sufficient basis for selecting methods. (It may, however, be a basis for identifying which projects in which to be involved.) Paradigm congruence and personal congruence along with the context and relevancy to the inquiry questions, are all necessary.**

**Interpretive inquiries are grounded in such principles as equality, self-determination, empowerment and action. Various features of such an inquiry process are discussed in the literature: reflection intimately linked to action (Argyris & Schon, 1974; Fonow & Cook, 1991; Winter, 1989), attentiveness to affect (Fonow & Cook, 1991; Kleinman & Copp, 1993), collaborative processes (LaRocque, Boivin & Downey, 1993; Reason, 1994), self-evaluation and reflection (Fetterman, Kaftarian & Wandersman, 1996), and the research relationship (Connelly & Clandinin, 1990).**

**Results of evaluations often lead to unanticipated debates. For example, the results of such evaluations can be regarded as findings and recommendations (Patton, 1990), capacity-enhancing (Mithaug, 1996), and/or oriented toward social and political change (Fonow & Cook, 1991; Greene, 1994).**

**An ordered way of assuring outcomes through methodology, and in advance of experience, is a conventional expectation. This expectation is doggedly adhered to in the 'request for proposal' tendering process.**

Such a demand inevitably turns the inquirer back toward the development of frameworks. A variety of frameworks have been posited. Guba & Lincoln (1989) propose a set of "parallel or quasi-foundational criteria" (p. 233) which includes notions of credibility, dependability, confirmability and transferability to parallel the rigour of a positivist practice. Moustakas articulates a framework containing processes which he sees as essential to phenomenological research, namely: epoche; phenomenological reduction; imaginative variation and synthesis (1994, p. 101). Integrity in carrying out this process and a full, rich, detailed description (Barritt, 1985) which evokes a response within the reader assures a contribution to meaningfulness. From an interpretive perspective, "to argue that certain procedures are required would simply pose a contradiction - the attempt to provide a methodological foundation for knowledge based on non-foundational assumptions" (Smith, 1989, p. 159). Smith (1990) concludes "the task of making judgments about inquiry is an eminently practical one whose rationality is not based on determinate rules but is a rationality that emphasizes judgmental interpretation, exemplars, and the norms that guide social discourse and agreement" (Smith, 1990, p. 187). Whatever approach is ultimately taken, it is incumbent upon practitioners to assure the credibility of the outcomes. In our practice, the engagement of participants, the sustained learning, the actions taken and indeed, being re-hired, are inevitably key measures of success.

**Within this context of assuring quality, what is the meaning of emerging designs? In fourth generation program evaluation, there is the very real desire to permit the design to unfold.**

**The final element in the hermeneutic circle is that of emergent design. Initially, given that the inquirer does not know what he or she does not know, it is impossible to be very specific about anything. But as the design proceeds, the constructivist seeks continuously to refine and extend the design - to help it unfold. (Guba & Lincoln, 1989, p. 180)**

**A post-modernist view can go further by rejecting all notion of methodology and focusing instead on the interpretation or deconstruction of experience. Method, then, "relates to the process of inquiry, but it does not tell us what to expect to find" (Rosenau, 1992, p. 117). The detailing of expected processes and structures, however, can create the same expectation of pre-determined outcomes as those structures common to other paradigms. A tyranny of methodology arises. The structures abstracted from the wholeness of an experience become a convenient means "by which we can communicate and understand something that has a bearing on some whole object" (Bohm, 1980, p. 38). Even within practices of program evaluation conducted within an interpretive worldview, and appreciating that 'steps' are not necessarily intended to be linear (Guba & Lincoln, 1989, p. 185), there are numerous structures or forms pulled from experience and presented as the stepping stones to**

knowledge whether it is a constructivist practice (Guba and Lincoln, 1989), empowerment evaluation (Fetterman, Kaftarian & Wandersman, 1996) or action research (Winter, 1989). What becomes customary in practice is that the structures and activities intended to be helpful in communicating experience, assume an importance of knowledge which then drives experience - as in inquiries. Even when we express commitment to emerging designs, the demand in inquiry proposals is for pre-determined strategies, processes and 'deliverables'.

Certainly, I was caught in the demand for pre-named order and the familiarity of proceeding along a path of pre-determined stepping stones. Thus, the data collection of phase 1 in the Thesis Inquiry Project, was separated from the analysis and interpretation. The 'results' of phase 1, would determine Phase 2, 'data' would be gathered, then interpreted, then re-interpreted.

### **Tyranny of Methodology**

The tyranny of methodology becomes one of trying to meet 'old' expectations held by proponents with 'new' understandings of methodology as an inquiry process. It is a heavy struggle. Guba & Lincoln (1989) suggest a clear contractual arrangement.

If it is, moreover, proposed to practice fourth generation evaluation, it is crucial to take into account the fact that this form of evaluation is neither widely known nor

**commonly accepted; it is not what one would call mainstream. A contract should, therefore, be drawn which protects both the client from evaluator misrepresentation or malpractice and the evaluator from client misunderstanding or misexpectation. (p. 188)**

**In my experience, however, no amount of diligence in the contracting phase has mitigated the tough and stubborn roots of 'old' expectations. It is like trying to rid the lawn of dandelions. No matter how hard I try, they pop up in the most unexpected ways and places! I can never seem to root them out. In some way, the more we have tried to address the question of methodology by building in safeguards such as contracts or conversations with key stakeholders intended to clarify meanings and develop shared understanding; the more we continued straddling paradigms. I have begun to think that this is the very process that in part, keeps us stuck and the inquirer discouraged by the heavy struggle. Words do not carry the weight of experience.**

**The tyranny of methodology may also reflect a dimension of human nature. I have sometimes wondered if the desire for certainty is an inherent quality of human experience arising from an underlying need for order through our connectedness with the rhythmic order of the universe and our interconnectedness with all that is contained within the universe. That certainty is something more than being "educated to see the need for clarity, tidiness, the removal of contradictions and paradoxes." (Binney & Williams, 1995, p. 162). This pull toward order creates a tension with the**



experience of daily life which is replete with ambiguity and uncertainty (Schon, 1987).

Emerging designs acknowledge this uncertainty and make room for the diversity of voices and the necessary confusion this may bring. Acknowledging uncertainty and confusion is the easy part. Finding a way through these unknowings is much more trying. I do not like to sit for long in confusion and uncertainty. It makes me feel too unsettled, as if my feet are not on the ground and I do not know what step is next. This hesitancy in myself, can become unsettling for others while expressions of certainty contain assurance, confidence, a feeling of competence - comfort.

Perhaps it is enough to recognize and appreciate that there will always be tensions between a desire for orderliness and the reality of ambiguity within human experience. This, in itself, legitimates and validates the experience of struggle when working within emerging designs.

### **Philosophical Influences and Interpretation**

### **Philosophical Influences and Interpretation**

For this Thesis Inquiry Project, I was more grounded in values and approaches than I was married to any singular method. I could not know in advance of my experience how the inquiry process itself would unfold. What I could clearly articulate were the philosophical underpinnings upon which my practice was based.

## **Phenomenology**

**Program evaluation is basically about improving something for people. It is about making a difference in how we live together in our world. Phenomenology gave me a way to see how to base evaluation on a process which included all participants in understanding ourselves and each other in such a way that we could incorporate learning and action. By knowing ourselves in relationship with others, we may create an understanding of the deeply human aspects of living that connect us all. Ultimately, we participate in community because we care about each other. Could we become more connected by the essences supporting human experience than by data?**

**From a phenomenological point of view, to research is always to question the way we experience the world, to want to know the world in which we live. And since to know the world is profoundly to be in the world in a certain way, the very act of researching/ questioning/ theorizing is the act of attaching ourselves to the world, to become more fully a part of it, or better to *become* the world . . . That is really to say that research is a caring act: we want to know that which is essential to being. (Van Manen, 1984, p. 3)**

**Phenomenology offered a way of thinking about a practice of program evaluation. I was profoundly struck by three aspects of phenomenology which seemed especially pertinent.**

**First, the universe of phenomenology is the ordinary human world appreciating that it is through our experiences and others that we come to understand something, in this moment, about ourselves and the world in which we live (Barritt, 1985; Van Manen, 1990). The study of lived experience embraces the full lushness of our lives and includes "mind, thoughts, consciousness, values, feelings, emotions, actions, and purposes" as Van Manen (1990, p. 3) suggests, and to which I would add, our soul and spirit. This means that all aspects of our human experience, and our perceptions and reflections of it, are worthy of and necessary for understanding. Oriented to knowledge of experience in this way, is the place for understanding about what makes a difference to someone.**

**Secondly, in taking ourselves and others seriously, we are connected in relationships as partners open to each other in such a way as to be willing to disrupt what we 'know' (Gadamer, 1989), and to create meaning through our dialogue. The client voice becomes empowered.**

**Thirdly, the interpretations which arise from our reflections in dialogue with ourselves and others, are a process for discerning "essential essences" (Spiegelberg, 1970). "Essential essences" requires the uncovering of the underlying structures of the human experience in order to "make explicit and seek universal meaning" (Van Manen, 1990, p. 19). Such understanding, as Bubner (1981) says, "gives us concrete knowledge that**

illuminates the issue in which we are interested because it lets the individual appear in the light of something more universal" (p. 46). In light of such understanding, how do organizations and their services now act?

Notwithstanding the inherent messiness in coming to understand ourselves and others in a particular context of experience, phenomenological method includes three features: open description "which must be full, rich and detailed" (Barritt, 1985, p. 26) of the experience itself and "of meaning of the expressions of lived experience" (Van Manen, 1990, p. 25); the investigation of essences, "which involves the transition from the description of separate phenomena to a search for the common essence" (Kvale, 1983, p. 184); and phenomenological reduction, a process which requires "competent and clear reflectiveness , on an ability to attend, recognize, and describe with clarity" (Moustakas, 1994, p. 93). A hermeneutic tradition works with the text in an interpretive process which is "necessarily circular, moving back and forth between part and whole, and between the initial forestructure and what is being revealed in the data of the inquiry" (Leonard, 1994, p. 57). Smith (1994) offers four requirements that must be attended to if "hermeneutic formulations" are to be "fruitful for new lines of research" namely: a deep attentiveness to language, a deepening sense of the "basic interpretability of life itself" a deepening sense of oneself, and about the creation of meaning (pp. 121-126).

**I was attentive to these facets of phenomenology when interpreting the transcripts.**

### **The Self**

**Being present to myself is an essential attribute of a mutually engaged process when I am offering my perspective through my experiences and knowings. Nonetheless, at the outset of this study I was aware that I was living a "split life" about which I was deeply concerned. Who I was was separate from what I did, my head was separate from my heart, my outer world was separate from my inner life. Indeed, I viewed my soul life as striving for no self (Roberts, 1984; 1985). From a perspective of transformation, I was at the beginning of a journey responding to a call for change. Whether it was a longing of the soul as Beatrijs of Nazareth (cited in Petroff, 1986) expressed, the experience of life as a desert of separation and disconnection (Estes, 1992), or what Mezirow (1991) called a triggering event, I was in a state of disruption.**

**The attention to self is important given that,**

**The self of the researcher is present throughout the process [heuristic inquiry] and, while understanding the phenomenon with increasing depth, the researcher also experiences growing self-awareness and self-knowledge. Heuristic processes incorporate creative self-processes and self-discoveries. Heuristic inquiry is a process that begins**

**with a question or problem which the researcher seeks to illuminate or answer . . . a way of self-inquiry and dialogue with others aimed at finding the underlying meanings of important human experiences. (Moustakas, 1990, p. 9 )**

**This Thesis Inquiry Project offered an opportunity to include the dimension of self. For me, this meant that I was attentive to the need to be with myself in the quiet of reflection for self-discovery. Another way of being present to myself was to be fully attuned to my feelings of an experience in the moment of their occurrence. This is much more difficult because some feelings and expressions of those feelings are more legitimate in the external world than are others. Tears, for example, are generally judged as demonstrating 'weakness,' as being 'too emotional'. Sharing examples from one's life experience has been understood by others as not appropriate within the traditions of evaluation.**

#### **Fourth Generation Evaluation**

**Embedded as I am in the health and social services fields, the work of Yvonna Lincoln and Egon Guba has been a beacon around which I have been oriented.**

**What I am arguing for is a recognition that some aspects of health, are social and behavioral in nature. These social, behavioral, or community-oriented aspects of health, are social and behavioral aspects of health**

**deserve an inquiry model that takes into account the multiple meanings that individuals may attach to their own care, behaviors, attitudes and practices. Complex behaviour and social patterns ought to be investigated using inquiry models that allow for the display and consideration of complex interactions. (Lincoln, 1992, p. 377)**

**Guba & Lincoln (1989) present such an inquiry model in their text, "Fourth Generation Evaluation." Their cogent model offers both a way to think about evaluation and a process for carrying out a fourth generation practice. Of particular interest to us was their articulation of the Hermeneutic Dialectic Circle as a way of both illuminating and working with human complexities. The circle is an interpretive dialogue which has as its aim "to reach consensus when that is possible; when it is not possible, the process at the very least exposes and clarifies the different views and allows the building of an agenda for negotiation" (p. 149). It is a process which builds constructions of meaning through interviews with respondents, through analyzing the constructions and soliciting other respondents to offer a re-construction of both the analysis and their additional ideas. And so the process unfolds building upon the constructions until clarity emerges. I was particularly interested in how such a process would and could value diversity and generate and sustain collected conceptions of meaning.**

## **CHAPTER THREE**

### **BEGINNING UNDERSTANDINGS: LEARNINGS FROM PHASE 1**

#### **Introduction**

**This Thesis Inquiry Project was underway. Ruth, Louise, Barbara and I began our conversations. Phase 1 unfolded along its path of eight, two to three hour sessions every two weeks, duly recorded and transcribed. Data collection. What emerged as beginning understandings were to guide the conversations of Phase 2. The data collection process was not as tidy as this might sound. We discovered very quickly that the project work we were doing, which was the source of our experience, could not be separated from the Thesis Project conversations. The stories of our daily experience became both the source for working on active projects and the source of learning about our practice itself. Conversations centred on the issues of immediate concern. In the demands of our day-to-day life and the reality of project demands, we did not experience what Guba & Lincoln (1989) suggest, "As data collection proceeds, analysis proceeds at the same pace, generating ever more complex and stable agendas to guide subsequent data collection" (p. 179). In many ways, I see now that my foot was still caught in the linear steps of my conventional practice; identify the question, collect the data, interpret the data, write it up.**



## **Analysis and Interpretation**

**And at the end of the sessions for collecting the data, I sat down to discern a first interpretation of the data for discussion with Ruth, Louise and Barbara. It was summertime. I was sitting amidst the pages of transcript examining each interesting bit and wondering about patterns, about connections, about similarities and differences. I was attempting to understand within Gadamer's notion. "The meaning of the behaviour, its truth, ontologically speaking, is neither in the phenomenon itself nor in the head of the observer, but rather in the play or interaction between observer and observed" (Woolfolk, 1992, p. 217). Through the interplay of myself with the words of our experience, I was seeking the underlying themes of our experience (Van Manen, 1990). Analysis and interpretation. I must admit, however, that I was somewhat in the mood of "get the task done." Meet the timelines. Move the project forward. Get it finished!**

**I was out teasing out connections and themes that could be offered as a place for beginning an interpretative conversation with my colleagues. Together, we would generate a collected understanding of our experiences from which decisions about the Thesis Inquiry Project could be made.**

**In the spirit of developing a first look at a constructed meaning of the transcripts that I could then share with my colleagues, I tentatively generated themes and organized them into two large categories, 'aspects of practice' and 'process of practice'. In naming each theme, I offered**

selections of transcript dialogue as well as my reflections on the themes and further questions that arose for me. When it appeared that the categories became more arbitrary than helpful, I merged all the themes into one document which I expected to form the basis for a group conversation, the opening conversation of an hermeneutic process.

While I was in a task mode at the intellectual level, another experience was lying underneath. That experience resulted in a significant shift in my awareness of myself and of the group experience, a transformative jolt that ultimately set the course for Phase 2. I do believe that I awoke to myself, "a state of being conscious of one's consciousness... keenly aware that [I] have awareness" (Ferguson, 1980, p. 68).

### A Transformative Jolt

July 25, 1995

Journal entry

*I am sitting in the family room looking into the garden in all its summer fullness; the baby jays taking their first bath, the sparrows flitting about at the feeders, the chimes gently singing its song. I am deeply disturbed. I can see the birds but I cannot hear them, I can guess at the melody of the chimes but I cannot hear it. I can see this beauty but I am not of it. I am sealed off by the window.*

*In reading my words. I am struck by my own verbosity and feel worried and uneasy. I have, for the first time, become profoundly aware of my own distancing from the painful struggle of our work. I can see how I move to*

*conceptualization and ideas before allowing myself, and others, the depth of understanding which comes from feeling experience. I seek the coolness of clarity and rationality. I have not allowed myself to wallow in the fullness of the struggle. It is as if I am seeing and doing our work behind a glass window that lets me see the magic of wondrous possibilities and in the seeing hints at its vibrancy and completeness. It is sense of sight, however, without warmth of feeling.*

Working with the transcripts, on a hot summer day, I was severely jolted. I was reading and re-reading the transcripts from our conversations, in one moment sort of ambling along and in the next, startled and then shocked by reading myself in print. Reading myself in print I saw myself in a new light. I didn't like what I saw. I was not contributing my felt experience: rather, I saw myself intellectualizing and conceptualizing at the drop of a hat, avoiding and ignoring the tensions of diversity and not listening with an ear to hearing the others. I was forced to look deeply into myself and those heartfelt places at the centre of my being where my deepest fears lived.

You already know a little about me: the struggle of straddling the world of natural science and the world of human experience, of trying to 'get it right', of trying to juggle a placating and pleasing voice on one side and trying to recover my inner voice on the other. Much more was necessary if my/ our experience was to be anything more than a superficial look at practice, a cover story to hide the secrets that lay

beneath (Clandinin and Connelly, 1995), a cover story to satisfy a task but without much caring for my practice or for my own life's journey. I felt the angst, the exposure as if I were a new-born babe, vulnerable and unconfident, uncertain and not trusting. It was a lonely struggle. My colleagues were attending to family, children and gardens. I felt tied to the paper to elicit its meanings. Finally, through the struggle, I was able to let go of the fear.

Estes (1992) writes about the life/ death/ life cycle, of being reborn into a different place. The experience of letting go and allowing a rebirth was, for me, a physical response. It was a washing away of old storied matter that littered my body and soul like debris on the ocean floor, stuck into the mud of my unconscious that I could not reach with my knowing mind or my feeling heart. I was left with a profound feeling of emptiness, lightness, bone-deep fatigue. And a restlessness of spirit. I could not settle to anything, not sleep, not meditation, not thought. I felt the emptiness and wondered about that. I also felt the lightness, the release. Drained, not as an empty vessel but rather an experience within of air, of lightness, of weightless space inside.

The resurgence of energy was an unexpected delight. Energy gathering strength through my body until I was flooded with it. How can I describe that sense of returning energy with a pulse and lightness not experienced in a long time. I was altered from a feeling of empty, listless quiet to a feeling of energy and activity. I was not sure what had happened or how to make meaning of my experience. I was not clear in

what way I would be changed. Just that I felt released. I was aware, however, that I now 'saw' something different in the transcripts. When a day before I was critical of another's perspective, now I could see the intent behind it. I could more truly hear another's story behind the words free from my tendency to dismiss or judge. Without knowing it, I had shifted myself from an intellectual rendering of understanding into a knowing that emerged from within myself.

I saw nothing extraordinary but everything I saw seemed extraordinary. It was a moment that came and went as weightlessly as everything else had that night. But as it went, it took with it the innocence of seeing in the old way.  
(Carse, 1994, p. 81)

I wrote the following letter to my colleagues.

July 25, 1995

*Dear Louise:, Barbara and Ruth,*

*It seems timely to begin writing to you and sharing my thoughts as I have re-lived the experience of our conversations this winter. I am immersed in our words and struggling to illuminate their meaning in this first iteration from the transcripts. I read the transcripts once, categorizing our conversations into possible themes and process elements of practice. Then I re-read these two documents and integrated them into the framework as outlined in the Table of*

*Contents. During this draft, I wrote my reflections as I went along and these are the underlined words.*

*The experience of reading the transcripts was a trigger to a transformative process within myself. I wonder how you will be affected?!*

*And then there are other things that I noticed in our process and that I am wondering about. What is the meaning of the differences in the air time taken by us? What are the habits of work that underlie our focus on the instrumentality of tasks? Do these habits conflict, dominate, dismiss or in some other way minimize other aspects of lived experience? And if our process mirrors our practice in the field, what can we learn about when we choose to engage/disengage with others, the imperatives of the realities in which we live and work and the imperatives for others with whom we are engaged? What have we learned about ourselves through our experience together?*

*I realized that the transcripts don't capture the fullness of our experience. We did express our feelings of frustration, anger, hurt, dismissal, judgment and even some joy in our experiences with each other. These seemed largely to occur in other places, in different configurations of being with each other and most often, I think, outside of the taped conversations. I wonder about this because I am reminded of our talks about whether we should or could reveal our feelings in the moment with the various groups we work with. I wonder if our reservations in doing that with others has something to do with the reservations we have with each other? What is mutual engagement within our practice when I am experiencing a barrier between myself and others? Is it a barrier of self or is it a barrier that fits with practice? I am reminded of your words, Louise:,when you*

*said, "How can I be engaged with so many people at one time? How can we talk about the requirement to be meaningfully engaged with others in participating in the evaluative process given the daily imperatives of ours and others' lives?"*

*And if what we bring to this first iteration reflects our current practice in the field, does this say anything about how we need to deepen ourselves and our practice?*

*While I ponder these questions about where we are now, I am also thrilled by the possibilities. We have taken off a first layer of our practice. This could well be enough for naming our practice and the dilemmas of practice and certainly enough for the thesis project. I am intrigued and enticed by the possibility of going deeper.*

*And as I reflect on these words and some of the dimensions of practice we identify: to create a safe place, to establish trust, to empower the voiceless, I wonder about our experience of each other. Is this something we want to explore further?? Will to do so give us more understanding of how to move forward in our practice? I know that for myself, when I feel the pain, I can say to myself "who needs this" and just move on to something else. This is as 'right' a response as any other, but I am also willing to move into risky territory if that is of interest to others.*

*I eagerly anticipate meeting with you, perhaps early in Sept.?, to begin the interpretive and decision-making process.*

*In addition to a different level of understanding about myself, I saw others differently, too. Barbara's voice was finally heard.*

## Becoming Three

March 13, 1995,

*Barbara: I have to share one thing with you - I think I am in a little bit of a different place. I think that right now you are kind of struggling with questions about what our practice is about and how we do evaluation and are we very authentic? To moving it beyond traditional approaches which is I think very important work but it is not something that I feel I have the energy to address - I am feeling stretched to my limit - so in one way I just want to look at this and say - let's just get it done - let's pull out the major things that we are seeing that would answer their questions, offer them something that would be learning and get it done. That is just where I am at right now because I am desperate to get things off my plate - have some normalcy to my life!*

Learning and listening about ourselves and others in the active moment of conversation is difficult for me and perhaps for you. I am often swept along in the current of conversation and do not notice what is under the words. And I did not notice Barbara's voice until I was immersed in the transcripts of our conversations.

Into this awareness of self, came a consciousness of the others and the compelling voice of Barbara throughout, raising her question about inclusion.



**It would be so much easier at this point in my experience to quickly glide over the issue of becoming three, to say merely that time and other realities intruded, and to move ahead. Lack of time and other realities are used to explain the story at the surface. There is always the other reality of our lives, the life we lead within ourselves in our inner space, our secret stories (Clandinin and Connelly, 1995) that we offer up to the surface and make visible to others only when we feel safe, in climates of conversations where we will feel heard and understood. And I knew this. I was unable to respond. As I write today I feel the clench in my stomach as I re-read my journal entry of Jan. 28, 1995.**

**January 28, 1995 (Journal Entry)**

*When Barbara called (following the morning group) to ask to talk to me about the group, the first thought I had was that she wanted to withdraw. I was aware of her tears, hadn't really addressed those and she was left with unresolved feelings and then there was the hurried ending. Knowing that was probably her intent, I was surprised that I did not feel more anxiety. I was aware that her voice was warm and friendly so I knew that I didn't have to hold myself waiting for rejection or retribution. . . .*

*Barbara shared her feelings of extreme vulnerability and how she had come to the day excited and articulate about her experience of a finished report of a project. But after the prolonged back and forth with the conversation, she felt*

*progressively more diminished and left in a state of internal withdrawal and hurt. I was able to offer my experience of how I saw her as trying.*

*As Barbara and I struggle with what are our issues, the question for Barbara was did she have the energy to put to it. We both know that we can work this through - the barriers become our personal barriers and willingness to engage in a process which is demanding of time and energy in overloaded possibilities. Barbara and I both think that we need to follow this theme of voice - to be aware of it, what prevents it in ourselves, in others, how to create an equal context for voice etc.*

Did you notice the date on this entry? This was in January, 1995 just as the "Thesis Inquiry Project" was beginning. The experience of not being heard was here, the words were here, understanding was not. My inattention to this conversation within the experience of the group itself, was an act of exclusion, leaving it as a voice outside the group. We subsequently had the "side conversation" in which we talked in confidence and in a place of safety. We did not bring this conversation back to the group to be worked through.

I did not truly understand, then, that safety is not about confidentiality. Rather, it is about entrusting the safety of one's spirit to another. It has little to do, I think, with guaranteeing a confidence in anonymity. I suggest that confidentiality which is understood as anonymity is a professional construct. It protects only a name and not a spirit. It is used to hide behind and not really reveal. What after all, can

ever be acted upon if experience is cloaked in secrecy. Experience contains knowledge from which learning emerges. If experience remains hidden, then barriers to movement in the collective experience are put in place.

September, 1996

Barbara responded to my interpretation of how we became three in these words.

*Barbara: I decided that I couldn't participate in the group because I wasn't ready - I wasn't comfortable. I felt too vulnerable. I was afraid that it would demand more from me than I could give - and expose me. I didn't feel that I could trust the other group members to be gentle with my uncertainty. They seemed further along their journeys than I and spoke a different language. It was a language that I didn't understand and could not speak. There didn't seem to be room for difference. I didn't feel equal to the struggles that I was sure would happen. It was already painful and we had only just begun.*

I was unable within our small group to include Barbara's spirit. It was not her lack of voice, it was my lack of hearing and paying attention. Finally, it became too much of a cost to participate. Barbara decided to withdraw from the project. I wonder what might have been had I been truly attentive to the other? What could have been learned if the barriers

evident in the dialogue had been attended to? It was too late for the Thesis Inquiry Project. Fortunately, it was not too late for our continuing work projects in which Barbara was a full participant.

### **Learnings from Phase 1**

The jolt to my self and seeing others differently had a profound impact on my journey of learning and the decisions which we took for Phase 2. There were other themes, however, which emerged from Phase 1, which became part of my learning.

### **And Having a Life, Too**

In our work, we were juggling several projects at once and trying to honour agreed-to deadlines. Imposed deadlines seemed to be more important to us than to those participants living within the changing demands of organizational life. Often, we would meet deadlines at considerable effort to ourselves only to find that meeting dates and times would be unexpectedly changed, reports were not read or feedback delayed. We had difficulty honouring ourselves.

February 23, 1995

*Ruth: I was really connecting with it last night. I came home and I had a slight headache and I was just beat. I had been in meetings, I started work at home and then I went to this 11 o'clock meeting for about three hours. It finished at quarter to two. Thank heavens we had lunch, but I never got outside, never had a break at all - so from ten to nine until I went to pick up my kids, come home, get supper. I poured myself a glass of wine and just sat down. That is when it got clear for me that I was not doing this [working]. Last night, when I stopped and sat down, I thought, I am really tired too. I don't really need to do this [working so much]. It is not healthy for me and I just told him [the person who contracted our services] that I am not into the three o'clock in the morning stuff. I have other things in my life.*

The kind of inquiry relationships to which we were ideally committed could not be confined to the patterns of established work hours familiar to organizational life. We were trying to "do it all," that is, live intensely in every relationship of our lives. It was a sense of, "Time is a scarce resource, but there is a sense of abundant energy" (Young, 1992, p. 151). We were, however, becoming more sensitive to the "competing urgencies" (Rubin 1983, cited in Young, 1989) of our lives. Our life-story is found in the life-stories of other professional women: the "competing urgencies" of partner relationships, child care needs, family and friendship connections and household management (Young, 1992, pp. 151-152 ).

## **Boundaries**

**January 31, 1995**

***Barbara: At least I would like to feel that it was O.K. for me to offer my ideas from my experiences other than as an evaluator. Part of it is our responsibility to bring forward some of our ideas, but I think that in this project, like in many others, people are put into boxes according to their positions and you can't move outside of these boundaries.***

**Boundaries to relationships were emerging for each of us. What would/ could boundaries look like in the intertwined relationships necessary for interpretive inquiry when conventions around roles and organizational behaviour are cemented into our expectations? I was learning too, that boundaries are also pertinent to our inner self, how much am I prepared to risk and in what context? Such self boundaries are elastic, expanding outward in a climate of safety, shrinking inwards behind a protective layer when our sense of safety is disturbed. The interplay of inner and outer boundaries is inevitably tied to an environment in which we individually and collectively feel safe.**

**The interplay of boundaries was visible in projects. Just as our relationships with each participant were uniquely our own, so too were the relationships between and among participants. We were beginning to understand how to use our unique qualities and capacities, differentially.**

**Thus, work would be carried out by that one of us who had established a strong connection.**

### **The Nature of Inquirer Relationships**

**The intersubjectivity of human engagement is recognized as central to an interpretive world view (Clandinin and Connelly, 1994, p. 422; Ely, Anzul, Friedman & Garner, 1991; Lincoln, 1989). What is most apparent in the literature, however, is that relationships are often discussed as obtaining 'rapport' (Erlandson, Harris, Skipper, Allen, 1993; Hutchinson and Wilson, 1994), as reciprocity within a co-operative or collaborative process (Reason, 1994) or with a focus on the 'self' of the researcher (Denizen, 1994; Moustakas, 1994; Reinhartz, 1992). Our conversations in Phase 1 illuminated an understanding of certain features of relationships which we began to see as essential but which moved beyond the notion of establishing rapport.**

### **Taking our lives seriously**

**In our relationships with people in our projects, we were struggling with valuing ourselves within a concept of mutual learning and teaching. How were we to put our selves into a relationship that was congruent with who we were and are? This was particularly difficult when the sudden changes in organizations required an immediate response by us.**

**Our inclination to please and satisfy those people who had contracted our services could dominate our decisions.**

**Feb. 23, 1995**

***Ruth: I felt angry about the turnaround, that was the thing for me. I got home and just realized that this is nuts. I am not staying up all night just so somebody can have it on their desk by Friday. I didn't even know if I would be able to do it. I felt as though what I was doing was compromising myself by doing those translations, getting this thing out by Friday.***

***Louise: It is asking oneself what kind of life do I want for myself and that is part of this way of being. You want to be whole wherever you are.***

**In some projects, I became aware that I was not responding in a way which dealt effectively with issues which arose because of my own reservations.**

***Lynda: You see why I see this conversation really becoming important for us? While different things trigger different emotions in us, I came away from that meeting feeling that the meeting was hijacked. I was really upset with myself because I did not claim my space. I allowed myself to give up my place. It is a different expression of the same thing and I think that these are themes that we have to explore. I think they become so important for the evaluation that we are***



*doing. We just don't hire ourselves on as a hired gun to do this project, or that project and just whip them off. We are talking a different kind of practice that triggers who we are which means that evaluation process requires a way to deal with that.*

### **Being real**

**Being real required us to be honest with each other. As in talking about our relationships with people in our projects, we were becoming aware that our level of honesty was dependent on how safe we felt. We were not putting our 'prickly' feelings openly "on the table" with others. When Barbara tried, we did not hear.**

*Lynda: What I am puzzling now is how to move ourselves into this kind of openness at the level of lived experience with ourselves even, let alone with our group, or inquiry groups.*

*Louise: One of the things we said was honesty, paying attention to how we were feeling, the prickly feelings, not just doing the task..*

*Lynda: And we never put it [prickly feelings] on the table. That is the other part then. If we are going to have prickly feelings that are around the project, then what prevents us from putting that on the table, and what prevented me in that meeting dealing with my feelings - what prevents us from being real with*

*who we are within the projects scope. Fear of being an emotional female - I don't know.*

**We were aware that not only were we working with ourselves, but that we were inviting others into a learning process based in relationships. These relationships required honesty, openness and vulnerability. Could we actually sustain such a perspective in every project with every participant?**

*Ruth: For me one of the things that I was thinking about as I was reading this stuff is this thing about how much of that is project stuff and how much of it is ours. I think that you are right in saying that what we are doing is inviting people into our learning process, learning is revealing of ourselves. If that is really what we are inviting people into I think that is an important question. I would say that if we tried to do that in every project, we would be dead by now.*

**What is the nature of "being real" within an inquiry process? Is it nurturance, as Bergum (1994) invites us to consider?**

**The principle of beneficence focuses on the act of doing good, in another's best interest. A stronger and more appropriate version of nurturance in which the effort is to strengthen and support each person's ability to choose what is best 'for his or her own good'. The word nurturance has the notion of nourishment, fostering, cherishing, encouraging, strengthening and maintaining. . . . Beneficence or care can be directed one way, towards**

**the patient; nurturance always occurs in reciprocation, through interaction. (p. 77)**

**If nurturing is required, how do we create the climate of safety for such interactions when such a relationship lies outside of participant expectations?**

**As we became more honest with ourselves and each other about how we were "triggered" in our beings by our experiences, we wondered how to be true to our experience and honest with others within the inquiry relationships. We were fully aware of the norms and taboos associated with an inquirer discussed by Kleinman & Copp (1993); the expression of emotion will be suspect particularly if those emotions are deemed to be "negative" such as being tearful, being too "close" with participants will raise doubts about interpretations and bringing our lives into the conversation will be deemed unprofessional. We experienced the judgments which ensued when we were outside of a conventional understanding of an inquirer role. Despite the gains qualitative research has made in being a credible source of information, relationships are generally defined by a role definition. Such a structure for containing a relationship does create distance between people within an understanding of relationships as personal.**

**Role is variously defined as subjective partner (Guba & Lincoln, 1989), as a primary research instrument (Erlandson, Harris, Skipper & Allen, 1993), as key decision-maker (Janesick, 1994), as "bricoleur" (Denzin**

**& Lincoln, 1994), as facilitator (Fetterman, 1996 ), as co-researcher (Reason, 1994), as "negotiator and social change catalyst" (Greene, 1994, p. 540 ) and as a "self" present throughout the process for "self-discoveries" (Moustakas, 1990, p. 9). The question becomes, how do we, in taking ourselves seriously, which means taking our personal selves seriously, participate in mutual inquiry relationships?**

### **Mutual engagement**

**Creating a shared understanding of mutual relationships with proponents of projects is difficult when convention understands the work of the inquirer differently. It is difficult to attend to one's own issues with energy. It is difficult to be vulnerable to a stranger. All of these issues arose for us in our conversations.**

**January 31, 1995**

***Lynda: I think that this is really a key value that this kind of inquiry needs the proponent to understand is that as evaluators we take our own lives seriously, we are engaged and involved and we will change as well. But there needs to be a willingness to engage in a way that there is no distance between us. They don't quite get that when one says it because they then, say "you are not being neutral or objective."***

**Barbara:** *I am at the place of saying, "I don't really want to invest in them in working this through in terms of a relationship issue." I am kind of saying to myself, I don't want to invest any more. I am taking more of a neutral stance. Part of me said you know what the role of the inquirer at this point would be, to work with the relationship, to go back to them and say; "We have thought about what you have said and there is something unfinished with respect to how you handle diversity. Let us have a conversation about that, name it and capture it and work it through." So why is it that I am saying that I don't want to do that?*

**\* \* \***

**Louise:** *I am trying to understand. It is new yet it is familiar - going too fast - the experience of going too fast, the experience of having a conversation that is revealing - that is too fast. I think that is a learning that I have to do. What does readiness mean? I know the distance, a sense of the distance that is created between people and yet in a way knowing that the heart is common to all. How do you seek? I struggle with this problem too. I have a history of not being heard. Not that I could not speak different languages. I have learned to speak many languages, the methodological one, the academic one. So it is not a language. It has to do with the kind of talk in dialogue - you hear them, maybe they don't feel heard by me. I am trying.*

**Relationships are frameworks of expectations or understandings with respect to the behaviours of the participants in those relationships. Relationships are fundamentally about accepting that we live together in a**

social world and that we deeply care about ourselves and others. Inquiry relationships develop through the dialogue in a deeply personal way, notwithstanding definitions of role and professionalism. My notion of relationship begins with understanding relationships as mutual and a source of growth ( Gilligan, 1982; Miller, 1976). In my effort to understand and validate my experience within an inquiry process, Jordan's (1986) model of mutual intersubjectivity was clarifying. She identified five features of mutuality: interest in and responsive to the other through empathy, a willingness and ability to share oneself with another, a capacity to acknowledge one's needs without impinging on the other, valuing and respecting another's way of knowing, and establishing a dialogue which involves both people open to change (pp. 2-3).

Conceptualizing relationships as mutual within an interpretive inquiry practice named and affirmed the qualities of a relationship with which we were struggling. Working within this framework, how would we accommodate other themes, "being real," "having a life" and the question of "boundaries?"

While the orienting purpose of inquiries is not the personal development of participants, by virtue of mutual relationships we are automatically into a process of personal development.

*Lynda: How do you sustain relationships which is what change is about in the face of tasks which are familiar? Let's just get it done - I am fed up with the struggle! And what is that about? Maybe that is normal.*

*Louise: What is the place of task I think becomes important to understand in this context of relationships. I remember one morning when I said I am not going to that meeting because it is going to feel like going through the motions - remember that conversation we had? It was more - it was a feeling, "we can't go through the motions here without working out the walls between us."*

What I began to understand for myself was that mutual relationships within an inquiry process are what the work is about. Anchored by the questions of interest that are being addressed establishes the boundaries for relationships (as opposed to defined roles). Within a mutual relationship of learning and teaching, understanding or knowledge emerges to the anchoring questions. The process for that understanding to emerge can be guided by Jordan's (1986) words.

Mutual relationships in which one feels heard, seen, understood and known, as well as listening, seeing, understanding, and emotionally available are vitally important to most people's psychological well-being. In many ways, we know ourselves through relationship.

It is through mutual relationships between and among inquiry participants that learning, action and change ultimately arises. This becomes an essential understanding within an inquiry process that seeks to include diverse voices and the empowerment of the voiceless. This is a limitation in Fetterman's concept of Empowerment Evaluation (1996) in

which the evaluator is viewed as a professional outsider bringing expertise and process assistance. Fetterman acknowledges the necessity of a "dynamic community of learners" but goes on to say, "An outside evaluator who is charged with monitoring the process can help keep the effort credible, useful, on track, providing additional rigour, reality checks, and quality controls throughout the evaluation" (p. 25). This perpetuates an understanding that the evaluator stands outside of the process, a life separate from the inquiry process.

I wonder if your first thought in reaction to these words is 'so what'? Of course we know that people come together to talk about something of shared interest, a relationship is established and activities begin. I take as my starting place that relationships develop through dialogue which reflects the qualities of a mutual relationship described earlier. It does not matter what the shared interest is that brings people together; that they are together, in conversation, begins the relationship. I do not begin my understanding of relationship as being defined by role, by ascribed activity, or by assigned position, (for example, a consumer of services, a service provider, a manager, an inquirer, a stakeholder). I try to begin by recognizing that the participants in the conversation each bring their life experiences of culture, of family, of learning, of work filtered through their personalities, their sense of personhood, their spirituality and their physical, intellectual, social and emotional capacities. I begin by accepting that it is through this relationship that learning and action occur within the context of the question of interest. The words are all familiar to



us. Yet, I find it difficult to be fully intentional and awake to these demands of mutual inquiry in every moment.

### **Trust**

As we shared our experience of our relationships in our inquiry projects, the issue of trust frequently arose. It was easier to talk about how we felt within our projects than it was to talk about trust between ourselves. I was not addressing the issue of trust within our group.

*Louise: How that made me feel is she is only going to trust me if I fit with her expectations. But if we only "get trust," we can't earn trust by fitting into others' expectations. That is where our practice is jolted. That leads me to wonder how.*

*Lynda: Do you think there are two kinds of trust? When the literature talks about "get trust," there is conventional trust and that is based on the competence model, a professional model, of practice and that means that you come in, you present, you offer, you speak with authority, with confidence, with expertise. You outline a familiar process. The proponents give their trust - that's the conventional trust. We don't get conventional trust because we enter in a spirit of not knowing. Their trust is disrupted at the outset, because if these guys don't know then what do they know - we enter with the spirit saying that it will emerge. How do we get trust at the level of relationship trust when we are asking them to enter into trust at the relationship level?*

**Louise: *It looks like with trust, there is more than what appears. I think that is important. Trust can either come from a feeling or a head level. And the trust that comes from the head level is the one that comes and goes.***

**Lynda: *So trust then at the feeling level has got to do with the genuineness, sincerity, caring, honesty, vulnerability .***

**Louise: *When you are grounded in the feeling of trust then you can then go in unfamiliar territory you can trust if there is more than what appears.***

**Lynda: *So this binds you to each other in the human experience which means you can do mutual work to get somewhere.***

**It is familiar to see trust as something that you can acquire at the beginning of a study (Janesick, 1994, p. 211) and once you have it, it remains intact. This was not my experience particularly when the way in which we worked was outside of a conventional understanding of evaluation. Doubts would creep into the minds of participants. Being ourselves was sometimes judged as being "*too emotional,*" "*not objective enough.*" As one proponent told me, "*I absolutely trust your integrity but I wonder if you know what you are doing in this project.*" Trust seemed to arise easily around things we understand and distrust has a way of surfacing with questions and experiences which lie outside of our comfortable pews (Berton, 1965).**

**In our experience, trust moved around and yet it is such an essential ingredient to relationships. I began to see that this experience within projects, was also experienced within our group. In the reality of the day-to-day there did not seem to be time to attend to all the nuances and uncertainties which beget doubts within relationships nor did I want to see what I was afraid to address. To not attend to the underlying nuances, ultimately creates, and created for us, a barrier in our relationships. I was profoundly jolted by my awareness of what I had failed to address with Barbara.**

**Phase 1 only opened the conversation about trust. Trust would be explored in more depth during the Birdwood experience.**

**Sustaining diverse voices - hanging on to what's important**

**How do we sustain diverse perspectives in ways that honour that diversity and allow for learning to occur which remains additive and not diminishing in its experience for others?**

**Ruth: *Consensus on the one final viewpoint.***

**Lynda: *Right, and then we may never get the varying perspectives around the table because the norm of "isn't this cozy and warm and feel good" get in the way of that.***

**Louise:** *We did say at the beginning that it was important not to let go what was important to them. Remember we said, in needing to hang on, there is a diversity around the table and to hang on to what is important to you.*

**Lynda:** *Did you get a sense in their offering that they were holding on to what was important to them which might have created disruption? We had no disruption in the conversation.*

**Ruth:** *I reminds me of that conversation about comfort in the Sally Project. You talked about everybody agreeing that they were okay and then somebody said well actually this doesn't work for me. It took a long time to get it.*

Hanging on to a diverse voice within a desire to achieve consensus or shared understanding is difficult. Donmoyer (1991) found that a deliberate process of identifying issues and concerns did not necessarily work. Lincoln and Guba (1989) have detailed the "Hermeneutic Dialectic Circle " (p. 174) as a way for illuminating all of the issues of concern. Whatever strategy is ultimately used to elicit understanding, my experience was that the time, resources and sustained interest by participants, were not available for extended deliberations.

**Meaningful conversations depend upon what is important for participants**

Familiar structures are part of the day-to-day management of experience. Think about how we manage conversations through agendas,

interrupting conversations meaningful to the participants to insert a pre-determined agenda disrupting what has already begun. The connections are stopped, what is meaningful in this moment is dismissed as less important than the agenda which was determined at another time and place.

Following my candidacy exam, I felt that one part of the study was finished and now the 'real' work was to begin. For the first meeting with my colleagues, I had prepared an agenda which included an outline of recurring themes from our previous conversations. I interrupted a conversation to ask if we were ready to begin. I turned on the tape recorder and began my prepared 'introductory' remarks. This was not an unfamiliar process for me as a designated leader. Following my opening remarks, there was a huge and empty silence. So I asked, *what does the silence mean?*

January 26, 1995

Louise: *What I experience in this is that we started earlier, Lynda, recognizing that the conversation had already begun. I wonder if the silence does not mean - for myself- I am trying to be aware of what is happening here and I thought that this is offered in the spirit of beginning and yet I am having a real struggle that we have already begun. It is hard for me to relate to this as the beginning.*

**Lynda:** *What I am having an experience of is all about beginnings, middles and endings. I have come with a notion of a need to begin - which is really traditional and it does not work - that is my experience, to interrupt and to be orderly interrupts. My sense of beginning which is to be able to get us talking about how we want to operate together does not work. That would be my sense in terms of agendas - it interrupts what is happening in the moment.*

**Ruth:** *I feel I need to respond to what you just said - the other side of it is, is the thing I said when I came in, which was I told people yesterday that I find it very irritating that we set up a time and this is what we understand is going to happen for the next hour and a half and what happens is something different. It is very irritating. We have time constraints, we don't have all day to do this.*

**Louise:** *So you think it will be irritating if the "agenda" is changed?*

**Ruth:** *I don't know if you would be irritated but I would understand your feeling a need to get on with business. I would understand that even though I also understand the need to go beyond that at certain times. It feels to me that we always have to recognize that there are constraints about what we can do. Often in the project that is what happens - people start to explore and it is hard to stop the exploration to say we need to move on.*

**Is it true for you too, that when you gather with others to 'work', and people talk about the hockey game the night before, the frustration of**

getting children to school or the last conversation they have had, that there is a part of you waiting to 'start' the task at hand? Somewhat irritated by the same person who is always late, or waiting for the lengthy story to end so the real meeting can 'start' or watching for the place where you can jump in as leader, take charge, throw up the agenda and do the real work? I can see now, how much agenda and task completion was a part of how I saw work. Yes, we got the work of designated tasks accomplished so that we could check off a list of completed activities, but the tasks are not the stuff of change. The confusion and tensions of the insertion of my agenda, a structure into the process of the conversation became evident. We began to be aware that working with prescribed agendas interfered with relevant concerns and experiences of participants. Staying with the agenda created a barrier to meaningful conversation. On the other hand, to give up an agenda was equally disconcerting as Ruth said. What would beginnings look like if the diversity around needs and expectations was to be valued?

So began our effort to understand beginnings. There are the conventional and familiar structures for beginning work meetings: agendas, designated leader, focus on the task that is expected and viewing conversations that have started prior to the official 'start' as not pertinent to the conversation. What is the meaning of the conversations already started and how are they the beginning? It seemed to us that beginnings can be seen either as ordered or as experiential, that is, arising out of what is important in the experience of the moment. The tendency to separation

is not unlike separating experience into data gathering and analysis and interpretation. It is the beginning of abstraction or "faceless" knowledge (Bergum, 1994, p. 73). Faceless knowledge, while it may be "valued for its universality and generalizability" (ibid., p. 73), is not the stuff that moves me to take action, nor do I believe now that it moves others. Thus, learning and action must somehow be embedded in the conversations of experience that have already begun. Could the two be integrated?

### **Disruption as a Feature of Process**

Within the process of the dialogue, I was becoming conscious that perhaps there were facets or features of experience which seemed to be a part of every experience. The experience of disruption was such a possibility.

We began to recognize that a disrupting or jolting experience was necessary for learning to occur. Just as I had such an experience in reading the transcripts, so others engaged in an inquiry process will need to experience some sense of disruption for learning to occur (Estes, 1992; Mezirow & Associates, 1990). Perhaps it is as Carse (1995) says, "The mind does not come to life until it meets what it cannot comprehend" (p. 30). A tension arises, however, between a need for predictability and something we can count on appreciating that to become too comfortable is to remain ordered by taken-for-granted behaviours, knowing-in-action (Mezirow & Associates, 1990; Schon, 1987).



January, 26, 1995

**Ruth:** *The other theme that is going through my head just from this morning's discussion is about disruption. We have talked about disruption before and I guess for me disruption connects with jarring. We talked about jarring before but never really connected the two ideas. For me it is just coming clearer now. We have heard from lots of people that what they need is a jarring experience and shifting from one thing to another is a jarring experience - disruptive.*

**Lynda:** *But what you said last time Ruth was maybe disruption and uncertainty is all just part of it and necessary - it is not a judgement - it just is. It needs to be.*

**Barbara:** *It maybe takes us to a different place that might be a more important place, a place where we need to be, because I don't think we could have continued what had started, I think there had to be some disruptions this morning.*

**Lynda:** *... now I am wondering if one can get seduced and want comfort - see that would be me - wanting everyone to be kind of comfortable and working in harmony and beginning to say how do we embrace disharmony for its value and not as how do we overcome it.*

I began to wonder about the meaning of disruption in the process of learning. How could critical questions, perhaps jolting questions, be received within the comfort of familiar behaviours and expectations? I

had had my own painful experiences of trying to raise critical questions which were not received as helpful or additive to the conversation. In fact, the experience of confusion and not knowing is often judged as not speaking clearly enough or the directions are not clear enough or a meeting is not organized well enough. The demand for familiar order can mitigate against the necessity for uncertainty. Was there something in the process of inquiries that we needed to understand more about if the inclusion of intentional disruption could be experienced as helpful?

### **Decisions From Phase 1**

Phase 1 was, in many ways, a complete experience in itself for me. My solitary sifting through the transcripts gave me a glimpse of myself that was as unexpected as it was important for my growth and, indeed, for my practice. It was an experience of "growing self-awareness and self-knowledge" (Moustakas, 1994, p. 17). This insight into myself in relationship with others compelled me to seek another opportunity to work differently with my colleagues. Thus my letter and invitation to move into riskier territory.

I was also becoming clearer in understanding that while I had ideas, intuitions and even the words about how to work differently in evaluation, I had not fully integrated an interpretive mindset into my practice. I now felt poised to make a complete transition from a practice of

**evaluation founded on a mindset around merit and worth, toward one of inquiry which sought learning.**

**When the four of us sat down to discuss the document and letter, the decision to "move deeper" was quickly reached. No time was given to collectively reflecting on the interpretation of the other data contained in the document. Verification, confirmation or the development of a shared interpretation did not happen. The interpretation of Phase 1 became my solitary experience as a primary researcher. I felt like I had become a sole researcher, "toiling independently to create knowledge" (Wasser & Bresler, 1996, p. 5), learning about myself but separated from my colleagues. I had the experience of being a participant in a highly engaged process, until it came time to work together in interpretation. My voice and experience dominated the whole. As a group, we were collected by our interest in our practice but we were equal individuals within a collective experience, we had not evolved into nor had we attended to becoming a collaborative unit. Nevertheless, move into Phase 2 we did, most regretfully as three.**

**The suddenness of movement into an altered course is a familiar experience in interpretive inquiries with emerging designs. Staying with what is relevant and meaningful for ourselves is the stuff that we can act upon. Ruth, Louise and I felt intrigued by deepening our conversations. We followed our hearts and in doing so, made three key decisions as a result of the Phase 1 experience:**

- to commit ourselves into deeper conversations particularly through a willingness to be more consciously self-aware and self-revealing.

- to compress the discussions into a retreat experience away from the "competing urgencies" of our lives. We would create a period of time in which life would not intervene.

- to intentionally reflect upon our experience in each of the sessions, appreciating the need to integrate experience with interpretation in the immediacy of the moment.

We retreated to the Birdwood Bed and Breakfast.

## **CHAPTER FOUR**

### **THE BIRDWOOD EXPERIENCE**

#### **Introduction**

**Phase 2, the Birdwood experience, was a continuation of the Thesis Inquiry Project, a search for understanding our inquiry practice. At the same time, it was also another beginning as Ruth, Louise and I, incorporating what we had learned from Phase 1, moved into this phase altered by Phase 1. Our conversations were informed by our learning, by our knowledge, by our experiences of inquiries, and by our desire to reach for deeper understanding of our uncertainties.**

**Chapter Four presents our series of conversations illustrated by italicized transcript data. You will notice that the data are no longer individualized. Individual contributions fell into the background as a collective understanding emerged. I have selected what resonated for me in our dialogues.**

#### **The Birdwood Conversations**

**The Birdwood Conversations occurred during two retreats to the Birdwood Bed and Breakfast. The first retreat was held October, 1995, the second in January, 1996.**

The first retreat contained seven sessions. Each session was similar in that dialogue became oriented around a focus, meaning was conceptualized in the moment, and reflection revealed the impact on each of us. The reflective sharing sometimes generated the focus for the next session. In this way each session was complete in itself yet additive toward the whole. In the course of the unfolding dialogue, themes rose to the surface to be played with until they fell back into the flow as another thought or feeling surfaced for attention. Naming this framework for describing our conversations emerged through my interpretive process. And as with Chapter Three, the words in italics are transcript excerpts of our conversations. They are intended to illustrate the themes which emerged for me in my interpretation of our conversations.

The second retreat was arranged because our conversations felt unfinished. The time between retreats resulted in the second retreat becoming another beginning, if you will. We were able to use this opportunity to conclude our conversations and to practice the learnings which had emerged from the earlier retreat. The experience of the final conversation appears as an illustration of our emerging practice (see page 158).

For now, the Birdwood experience begins.

## **Context - Settling into Birdwood**

**It was on a crunchy Saturday morning in late October that Ruth, Louise and I staggered up the stairs to the Owl's Nest at the Birdwood B&B, weighted down (I don't believe in taking two trips!) with food, bedding (for the person who won the right to sleep on the floor), clothing, tape recorder, pencils, pens, paper and all the accompanying paraphernalia that we needed for an overnight stay. Our nest was truly that, a cozily warm and quiet place nestled in the woods, an Innkeeper who nurtured us with fresh baked breads and savory soups and no phones! We settled into Birdwood quickly surrounded by its peacefulness, our spirits enveloped in nervous anticipation. It was a context in which I could experience security and safety with my partners.**

**We knew what we had come to do. Away from the imperatives of daily life, we were prepared to intentionally penetrate the depths of our experience as inquirers. Being distanced from the demands of active projects also gave us an opportunity to focus solely on our experience as inquirers separate from a need to address specific concerns of any given project. To be efficient with our time and energy, we decided to organize ourselves around sessions that would conclude with reflection - reflection would be the vehicle for sharing our individual understanding, perhaps developing a shared interpretation and identifying actions. The topic for conversation in each session would emerge from the learning of the previous session. We would release ourselves from a notion of pre-**

determined agendas and immerse ourselves in the experience of our conversations attentive to its meaningfulness. In this way, experience, interpretation and action, that is, the behaviours which arise from what is learned, would be intertwined.

We found our places at the kitchen table, turned on the tape recorder and started to talk. Thus began an experience of a intense conversation: exciting, stressful, fatiguing, exhilarating, a roller-coaster of learning and at the end of that time we could say "*We did it!*" We talked, we walked in the woods in the blistering wind, we ate good food and drank wine together in the evening. We laughed and talked and shared our vulnerabilities. We were in a process of seeking to discern themes that could be pulled "from an unknown and undefineable totality of flowing movement" (Bohm, 1980, p. 49).

### **Session One**

#### **Focus: Understanding What's Important**

Appreciating the necessity for understanding what was important for each of us in creating a safe place, I began by opening up a conversation around this focus. I experienced myself not so much as defining an agenda but rather making a suggestion out of my need. The suggestion struck a responsive chord and so we began.



*Lynda: I'm a bit nervous about how to begin knowing that having agendas hasn't worked in our practice. I'm feeling a need, however, to bring you together around this next phase of the project and about Barbara's decision not to participate. I wondered about our last talk when we talked about the need to be more disciplined, more intentional and more focused on process. We might start with the question "What would be important for us to create trust, to create space, to create safety?"*

### **Emerging Themes**

#### **Sharing what was important**

We were collected around the task of the Thesis Inquiry Project, to understand our practice, but we had not reached for understanding about what was deeply important to each of us personally in Phase 1. This contributed to our very slow progress and Barbara's decision to leave the group. Phase 1 conversations focused on our 'out there' world, the world of our project experience and not our experience with each other. We had not paid attention to our own relationships. Phase 2 was an opportunity to learn so we were prepared to experience risking ourselves in unfamiliar ways. Each of us offered what was deeply important as we entered Phase 2.

*The only thing that is important to me is that we get everything we can at this point. This means that we would all say we don't know what you mean - it requires a defenseless stance.*

**\* \* \***

***Feeling that I won't be left alone. To be able to express myself, to reveal myself and to be valued for a different perspective.***

**\* \* \***

***Being valued if I don't get it right, If, in being candid, I trigger a response how can I be O.K. with that?***

### **The dilemma of language**

***Never being able to feel that we could have a conversation even though we spoke the same language.***

**The language of evaluation, the language contained in different world views, the language unique to each person, created barriers that were difficult to overcome in our practice. We experienced that words sounded the same but held very different meanings for participants in inquiries. Understanding required a readiness to listen to the other in such a way as to understand each other's perspective, and in a spirit of being willing to revise one's own view based on what becomes understood in the dialogue. It was difficult establishing a context for listening and hearing. It was difficult bringing to consciousness the necessity of working with different meanings contained in the same word. Participants often concluded that because an evaluation proposal had been accepted, the next step was data collection. Yet without a**

conversation around the meaning of the intent of the proposal, were we really engaged?

### **The struggle of being in the moment**

*How to be in the moment but not in the moment.*

\*\*\*

*Balance between being in the moment and planning.*

Our conversation revealed the dilemma of living the fullness of the moment and yet attentive to the need for preparation. When we approached meetings with pre-determined plans we often missed the importance of the unexpected. Yet to be in the moment could lead us to spin in the back eddy of the channel. This was true for me in Phase 1 of this project. I followed the flow of immediate project demands assuming all of these project-focused conversations were equally helpful for the Thesis Inquiry Project. As discussed earlier, this was not so. I found that to be fully in the moment required that I be firmly and actively anchored in the orienting focus.

### **True to self**

*You should not have to feel like you are giving up who you are to do the work.*

**The effort to be true to self, while appreciating that in a relationship one also needs to be sensitive and attentive to others, continued to create wondering questions for us. We were aware that some expressions of being true to self could "scare people off," which would certainly be a barrier to mutual engagement. Yet to withhold oneself also created barriers to relationship.**

**We knew that being true to self is also about being vulnerable as Emma's story taught us. We wondered, however, how much honesty and openness we were capable of within every inquiry?**

*If I get to know you really, really well, then I get to know myself awfully well too. Do I want to do that? It would mean revealing myself quite deeply.*

### **Process matters**

**Our conversation in Session One moved from a place of wondering about who we were and how we acted in inquiries (as guide? as facilitator?) toward trying to understand "movement" itself. What was the movement that resulted in learning as opposed to movement that leaves one spinning in circles? Suddenly, a connection was made that movement was in the process of the dialogue. We began to understand that there was something in the process that led to transformative change. With this awareness we began to glimpse why implementation of written work might be limited. Outside readers of reports have not had the experience of the process.**

*What will they do with only the summary [of our report]? Will anybody ever look at it or is it the process that really mattered?*

*\* \* \**

*We are offering a process of transformative change.*

*\* \* \**

*We are talking about practice where the movement is in the process - so there is no question at the end of an inquiry whether it has been implemented or not. The process has resulted in implementation.*

### **Confusion of diversity**

The uniqueness of every individual always creates a context that contains diversity. If we look alike, there is a tendency to assume a homogeneity and not seek out that which is unique. Diversity in itself creates confusion; therefore, confusion is always present in dialogue particularly in the beginning conversation.

*There is going to be some necessary confusion by virtue of the diversity.*

We realized that working with this necessary confusion requires addressing it at the level of relationship, given that it is the personal meaning we apply to words which is important. This was an important awareness because what frequently happened for us was a demand for clarity as in "terms of reference," clarity of objectives or written agendas. It is as if we could just write better or have more precise language, the

diversity would go away. Our invitation to participants to engage in conversation about the meaning of words was sometimes seen as a waste of time necessitated by our lack of clarity in our written words.

### **Reflections**

At the end of this session, we stopped the talk and invited ourselves to spend a few moments reflecting on the dialogue and what had an impact on us.

*Ruth: Part of me felt there was too much too fast, really intense and my experience of it was then I start to feel confused again. I felt that we all had some eureka, some of it was collectively, some individual so I had some experience of feeling separate in our eureka's. The feeling of some separateness seemed like the group started to get more confusing than helpful. I had an experience of myself of finding it hard to listen and talk at the same time, and then wondering if I am a very good listener.*

*Lynda: I noticed that we are listening differently because there was much more positive feedback. I don't mean positive in the sense of niceness. Where I got to today was understanding process as shared interpretation, it is about how do we share diversity in a conversation that leads to some understanding and movement.*

*Louise: I felt energized with the thing that I wrote down first because I was really taken with the energy level, of being energized and having lots of energy. I didn't have any bad feelings nor did I have any feelings that "I should not say this. I was touched by Ruth's comment about my position in the group when I revealed my fear of being left alone.*

## **Session Two**

### **Focus: Movement in the Dialogue**

**We were intrigued with the notion of movement being an inherent component of dialogue.**

*It seems to me that we are already saying something about moving forward, we are saying that movement forward if every perspective has some sense of truth, then moving forward requires taking the truth that is contained in all of the perspectives to develop a "we" or a movement forward that includes everyone; that does not "exclude" any one perspective.*

### **Emerging Themes**

#### **Role**

**Recognizing, then, that movement is occurring in the process of the dialogue, we wondered about a role for us as inquirers. In naming the**

activities, we wondered if these could be further understood as markers or indicators of behaviours contained in the process of mutual relationships. If so, then there would be a way to make progress, and/or the barriers to progress, visible and we would be able to act on this awareness.

*We are saying that within a supportive role, an affirmative response, a catalyst for action, it is offering what you see, it is active participation, it is creating space, it is letting go of agendas. We would say those are then some helpful process markers, process pieces, process behaviours that we would be looking for in ourselves and in others within the dynamic of the mutual relationship.*

\* \* \*

*It defines the mutual relationship. We have the context about what the learning question is about and then we have a piece of the process that is behavioural that we can look at. As facilitators oriented to creating the space for connectedness, then it is allowing participants to speak from the heart. That says something about connectedness being heart to heart engagement.*

### **Barriers to movement**

The barriers or boundaries that get erected within relationships which inhibit movement emerged in our conversation.

**Remaining focused.** Remaining focused became a particular issue in my learning. I had interpreted 'being open' with inquiry participants as sharing my thoughts not only within a given conversation but also



sharing my thinking about the larger questions of the inquiry. I saw my offering as creating a sense of inclusion for participants in all the elements of an inquiry. I became aware that I was, at times, burdening the conversation with concepts not meaningful to the day-to-day experience of some of the participants. Indeed, I realized that conceptualization could be alienating.

*In mutual relationships then we need to be sensitive that we don't burden the process by whatever it is that is extraneous to what is helpful for what we are there to do. And that doesn't mean one is hidden then, it just means one is sensitive to what would be helpful.*

**Sharing ourselves.** It is awkward and risky to be in inquiry relationships. Not only is there the struggle of boundaries, of role and of credibility, but also the personal effort to learn new practices.

*We have our own feelings of awkwardness in breaking the barriers of conventional practice as we are inviting participants to do in breaking their habits in how they see the world. So in that invitation I guess we just share ourselves, that we are in it together, awkward for all of us, we don't have an answer to it but we have a sense of what is helpful. Is that the only meaning there is out of all of this?*

**Creating space.** The requirement for and necessity of creating space and safety for participants engaged in mutual relationships was difficult given the diversity of needs always present at the individual level and the urgency of the collective to be connected. Sometimes it was easy to be distracted by other exigencies such as time, resources and personal limitations, as I was in Phase 1. A "let's get on with it" demand. I wondered if this was too facile an explanation? It is an oft repeated phrase in inquiries to cite time as the mitigating factor to addressing concerns or implementing learning. Does it take time in a linear sense, or is there something in the process that needs to be considered?

*Creating space for connectedness and always staying oriented to that and just that isn't easy - it is not an easy role.*

**Necessity of naming barriers.** *So if we look at our process, what has prevented us from connecting deeply?*

In Phase 1, we were not attuned to the barriers present in the relationships so that they could be actively addressed. During session two, we named the barriers to our connection appreciating that by better understanding ourselves, we can better understand others.

Our dialogue explored a number of other barriers: feelings of breaking conventions such as confidentiality, personal feelings that may reflect a fear of losing connections, inadequacy, giving up one's voice,

**making assumptions, not checking out assumptions, revealing oneself. By being willing to name our barriers with each other, we were more able to be attentive to other's experience. By elevating barriers to consciousness, they can be addressed.**

### **The importance of reflection**

*You can't do any of that unless you have time to reflect. So the reflection time to be able to think about what it was that happened, to be able to flag the awkwardness, what the awkwardness allowed for - you can't have self-awareness without reflection.*

**We began to see the importance of immediate reflection as a way of elevating intuitive knowing to a conscious knowing. It was through verbalizing what had impacted us in the experience that movement was demonstrated and actions identified. What would this mean for inquiry conversations?**

### **Values underlying practice**

**Our deeply held values were opened up for conversation. It helped us to know where we would spend our time given that the investment required to be engaged in mutual learning relationships is very demanding.**

*I have a strongly held value of deep caring for learning and for people's sense of success and achievement - that is why we would bother creating space because we deeply care about what they want to learn about. So we hold the value that we are deeply engaged and caring about the question of learning about what is on the table which is why we are there. True?*

*\* \* \**

*Because we are not interested in every learning question, we are only interested in those that we feel we can make a difference, we feel that we can make the world a better place.*

### **Reflections**

*Lynda: I was stimulated. I think I listened more . I felt like I heard you and out of hearing you I could see how to put it out there and then I thought that the clarity of conceptualization is my contribution and I will need some feedback about that too.*

*Louise: What I experienced this morning in starting was that we shared our uncertainty -I had experienced a real sense of mutuality.*

*Ruth: It was an experience of a difficult beginning and then gradually clicking into it for me personally. I think I have raised this at other times, the thing about needing to use the practice as examples all the time. Is that irritating for other people? Does it detract from the conversation? These questions are a direct*

*response to some of the questions that you were raising, I was very aware of your excitement and what I thought was your real skill at taking the conversation, analyzing it very quickly and cutting through the point, so that we could then come back and say "is this it?" But I was also very conscious of you anchored in bringing us back to ourselves in the group. So even though you may have experienced some of it as being about conceptualization, I thought you were the one who kept saying "how does that relate to how we work together here?" I think this is very helpful because last time I think was the first time that I ever admitted that a microcosm idea was worthwhile. [the concept that the macro is mirrored in the micro]. Then I felt that I got some learning for my own practices in concrete ways. That thing about self-awareness conversation is very important to me and how I can work in a different way than I might have otherwise.*

### **The Topic Arises Through the Reflections**

*Ruth: So are you suggesting for our session after lunch is to reflect on the morning as the process?*

*Lynda: I think we saw process as movement.*

*Ruth: That would be valuable because I know this last time I had written down also I was ready for a break again, I couldn't have gone much further. Last time I*

*had said it was too much too fast. It was very intense and if we do too much it becomes confusing , I was starting to lose it.*

**We broke for lunch. I felt confident that I was in a flow of learning.**

### **Session Three**

#### **Focus: Examining an Experience of Process**

**In Session Three, we intentionally wanted to reflect on the experience of the process in the previous session, feeling that our process would be a microcosm of other dialogic processes in our inquiry projects. We left Session Two highly animated, albeit tired, feeling that we had articulated an important idea. Could a deeper look yield something more?**

*We want to look at what happened in our morning session that left us with a feeling of empowered action.*

### **Emerging Elements of Process**

**The conversation opened.**

*So now if we began by exploring our experience of starting and what I see for me, the experience was that we shared our uncertainty which was quite different, we shared it in a different way, we had thoughts, or whatever feelings we had or thoughts that we had we came and put them out as well as our reservations to say we know where we are going so we were honest - that tone of honesty was set by admitting we don't know how to start, but it is not for lack of thought, it is not for lack of feelings.*

**\* \* \***

**The willingness to share uncertainty is reflective of more than doing an activity. It is indicative of a climate of safety in which one can be themselves which enhances trust.**

*You had that confidence that judgement wasn't going to be there which demonstrates to me that we are at a place of increased trust than we were before.*

**For the next hour and a half, our conversation unfolded naming the qualities and making meaning of the process which we felt had affected our movement in the previous session. Some of the qualities were familiar and well known to us in our experience and in writings about evaluation. Others were insights or ideas into another way of thinking about elements**

of an inquiry process. We were sharing and learning from the exchange, we had not yet pulled the relevancy of these words into our practice.

It was an intertwined flow of words. For ease in sharing the conversation with you, I have collected the qualities into categories that you, hopefully, will toss back into the flow if they become interfering.

### **Elements of relationship**

The following elements of process were identified which pertained to creating and sustaining mutual relationships: sharing uncertainty, necessary nervousness and being emotionally present. Sharing uncertainty, as noted above, is indicative of a mutual relationship already existing. Sharing uncertainty could also demonstrate for others that we are all ultimately uncertain about what lies beyond the present.

As there is uncertainty in beginnings, so is there a necessary nervousness because of the need to collect individuals into a sense of wholeness. It is familiar for inquiries to begin in the minds of those who see a need for an inquiry. A design is articulated, evaluators/inquirers hired and the inquiry begins. All of the participants of the inquiry are not at this first table. At some later point, the key participants gather. The table is expanded to make room for the contributions of added participants as in a potluck supper. Another conversation has begun. This expanded group needs to come together into a collected understanding of what has already been begun. And there is nervousness. How will I be able to handle the unexpected?



*There is a necessary nervousness because our desire for starting has to reflect the collective, mutuality, where do we need to start - not where do I need to start, but where do we need to start - and the we is always negotiated.*

*\*\*\**

*The necessary nervousness may be a natural response . We can never know in advance who is going to be there for the we and the we will have to be negotiated. So even if one brought an agenda - that is where the I is - one still has to say "where are we" and not knowing what the we is. We just have to get comfortable with what the we wants. Early in my career I never had enough confidence that I had enough in my hip pocket to respond to the we, therefore, an attachment to agendas. If the group doesn't want to go where you go, then what is useful to do?*

Being aware of nervousness for myself and for others requires being emotionally present in the conversation. This is an awareness of self, an awareness of others and a readiness to offer what is genuinely experienced. These are oft repeated words. What was becoming apparent to us through this look back into what had moved our learning in Session Two, was the possibility that it would not be a choice about whether I could be emotionally present. Rather it is necessary for movement and action.

*You have to be able to be emotionally present, you have to be able to be there emotionally. We are talking about an engaged inquiry approach.*

*\*\*\**

*If having to be emotionally present what do we do with the self-awareness when our own limitations are impacting how we can be emotionally present? So maybe we just accept them, we aren't putting down rules for the inquirer to be perfect, we are saying wherever one is engaged the struggle is always be sufficiently emotionally present that you could raise the tensions, the diversity, the awareness and we could find a way maybe, I think how can I find a way.*

Validation of who and how we are is a starting place for the development of mutual relationships. In our experience of being validated at Birdwood, we were able to move past our fears and into our capacities. Validation would mean seeing all behaviours as having something from which to learn.

*Barriers are overcome when we create a climate that validates everything as natural - validates natural responses. People often label resistance as a negative behaviour, "She is resistant to the change." We know that resistance is a helpful quality for understanding process (perhaps the conversation is moving too fast and a participant feels lost) or about what may be happening for a person (perhaps fear of the future)). It is important for creating a climate for learning that we are able to frame experience in a way that validates human experience.*

It was apparent to us that once we had established a trusting and meaningful connection with each other, there was a feeling of movement, of going somewhere together.

*Once we had the connection the movement didn't take long to get started.*

**We explored further how this connection happened. The transcripts revealed a listening attitude in which each of us responded to the other in a way which added to the conversation through asking wondering questions, offering support for ideas and building upon others views. We also reiterated the importance of being anchored in the conversation, that is, knowing what we were working on together. In the instance of Session Three, we were anchored in understanding process.**

*Grounded in the concrete of the day -to -day. That is what you say over and over so well, Ruth , the need to stay grounded with what is important and what is important in the day-to-day.*

**Being grounded in the concrete of day-to-day is not sufficient. What is presented as important may not automatically be relevant to what we are doing together. I am reminded again of my experience of Phase 1. The conversations for the Thesis Inquiry Project were entwined with actual projects in which we were working. I assumed a relevance to the Thesis when that wasn't always so. The transcripts revealed that we were sometimes repeating a similar conversation like a spinning top that eventually collapses onto itself - and with no forward movement.**

*And relevant. The relevance of the relationship and connection, but I think that relevance is really key to... Relevance to the work that we are doing, relevant to the consumer, if there is one, and relevance to the deliverer. It has to be relevant in both places.*

*\* \* \**

*When you talk like that, to me the word relevance already is an expression of connection. Relevance names a kind of connection.*

### **Elements of role**

**We wondered about the work of each of us as inquirers. Was there a role to be played out? Were there attributes of each of us which emerged from our experience that could inform how we could work in our projects? What was revealed in our conversation was the importance of conceptualization for clarification and action, working with process in the moment and writing as history.**

**An ability to conceptualize was identified as helpful for gathering strands of conversation into a meaningful framework. I have a habit of outlining concepts on my notepad which arise for me from a conversation. At Birdwood, my colleagues could see my bit of paper and I could speak to it. I was becoming aware that this was a skill that I might be able to use more intentionally.**

*I think one of the things that happened this morning was your way of taking what was being said among us and taking it to a framework of some sort was the clarifying process.*

*What I have become for us is the facilitator/guider like any other project. So what we are saying is there is a role of conceptualization that belongs with the inquirer. In this particular project, I am assigned more of the responsibility around the conceptualization*

**What we further explicated was that through the conceptualization which was occurring in the conversation, we were collected into a common understanding. From this place of connectedness, actions would emerge. This was the beginning of our insight into everything happening at once and in some measure, something is also completed in every moment. We connected this notion with why it might be that reports of inquiries tend to sit on the shelf.**

*What we are saying is that action is related to the conceptualization, to the reframing in the moment - that is when movement occurs. That is why written summaries or reports are placed on the shelf. You get the experience of the moment, you go away and think about it, meanwhile, their life [the participants] has gone on. You bring it back, but they have already moved on. I am finishing the report and they are now moved on here. The report is actually irrelevant. So movement then for implementation depends upon this kind of movement within every conversation.*

**Working with process as it is occurring in the moment was identified as an activity that would fit within a role of an inquirer.**

*By virtue of our role as inquirer we would automatically move into framing back, conceptualizing, commenting on the process and leading that discussion.*

*\* \* \**

*I would go so far as to say that it has to happen in the moment to be most effective for movement because to sit there and observe it and go away and write it up and bring it back - what we have found is that it doesn't work.*

Working in the moment was significant for us as it pertained to writing. Writing was always after the fact. Writing up the whole project at the end of the project sometimes was several weeks distant from the last conversation. Even meeting notes, if they were written and distributed prior to the next meeting time, were often not received nor read by participants. Our ideas were free flowing.

*The writing is the history. It is not about implementation nor about recommendations because that has all happened. We need to start writing down at the end of every meeting then , "what have been the markers in the process that led to that action."*

*\* \* \**

*I am kind of thinking that everybody needs writing because we forget, just as we forget between meeting times. People also forget, so we are also the holder of the memory.*

**The pieces were beginning to be put together in a way which could allow for writing to be done in the moment by following process.**

***Being the memory connects back to what we are always oriented to, what is there to learn about. So if our job then is also to keep an eye on the conceptualization of the process in the moment, the way that we write then at the end of all of these pieces, I mean if I could now begin to get clear about some of the human underlying processes and markers are about, then one can start recording and paying attention to those and by the end of the meeting you have done it all.***

### **Reflections**

**Louise: My reflections led me to a place where I didn't realize I would end up. Maybe I got in touch with something that I could not articulate in the moment when you said that is good. I had a feeling but I couldn't name it, I couldn't put language to it, which is one of the barriers of talking from the moment, that you don't have the language for the feeling.**

**Ruth: For me it feels overwhelming to have to be so visible - maybe I won't want to do that kind of work, so that was the second part. Thinking about how much energy it would take always to be so conscious all the time. We have talked about the intensity before and this is a different way of talking about intensity. So how do we take the learning that we are doing here about what it is to be a facilitator. It is not really about evaluation, it really is about something else.... then how do**

*we start that conversation with people in a different way that moves it? Finally and this probably should have been first, was that I don't feel that great. I felt that I needed to be here, to stay present through part of it and I could even do that when I wasn't feeling that well.*

*Lynda: I feel tired but a good tired, feeling that I understand quite clearly and then began to wonder how are we as a group? What was our process? Did we feel equal? Was there equal eye contact? Air time? I was looking this way and that way and wondering how that feels... trying to see what was our process.*

*What was our process? There was intensity, there was laughter, there was awareness of self in the moment. What I know is that we moved quickly because we are able to see and acknowledge the process. There was no defensiveness around not knowing - I mean I feel really quite exhausted when I think of what we have accomplished, and you said earlier we have laid out the thesis, we pretty much have. It is phenomenal to me.*

**The reflections reveal the intensity of our experience. I was aware how in a period of no more than an hour and a half we had been able to look back on our experience of Session Two, identify elements of process and expand familiar notions into glimpses of ideas which could significantly change how we would work. Would such a practice even be able to be labeled as evaluation, as Ruth wondered?**



### **The Topic Arises Through the Reflections**

*I thought you asked a question for the next session which is about "how do we take it [the practice] out?" Because then I thought the next session needs to be about what is the language which is the naming of the practice. We can't take it out until we framed it more, but we are getting really clear about what it is internally. But what is it if it is not evaluation?*

#### **Session Four**

#### **Focus: Naming Practice**

**We began with a topic and some optimism that we could further refine and name our inquiry practice.**

*So it is all of those things - those are its parts so we can trace out the movement, we can trace out some of the behaviours - we have got gaps to fill in, so what is it? It is inquiry. I think for me it is inquiry because we go in, not knowing, so we are going in an inquiry stance, seeking to know. Maybe having the attribute of seeking understanding and seeking to know, so we would say it is an inquiry process.*

## **Emerging Theme**

### **Collaboration**

**Collaboration rose to the surface as an idea to explore perhaps as an ultimate outcome of an inquiry enterprise.**

*It is inquiry oriented always to what end. It is always to the end of creating connectedness. It is like valuing it, it's an inquiry process that values, the being of it.*

**\* \* \***

*Then if you think, what is collaboration? It is people. It names the kind of relationship - a sense of validating different voices, collaboration being in it all together. To me it also implies this notion of we need each other. So it names already a kind of connection. When you think about collaborative relationships it names a kind of connection that has within it the elements of whether you call it social cohesion or bonds or connections - it names a kind of connection that we want to create in the world, always aware that you don't want your voice to be the one that is so strong it could not hear those that we really need to hear from, those that have been oppressed and silenced for so long, how do we give life to what we have oppressed.*

**\* \* \***

*Maybe our view of collaboration is what distinguishes us from that body of literature that is called collaborative research.*

**\* \* \***

*If you read the literature, I would bet that the view of collaboration is a means and we are saying that it is the end, the outcome. It names a connection, collaboration already names a kind of relationship that reveals bonds, interdependency, connection. It is not a means to an end, it is an end itself and that would be what distinguishes us from the literature on collaborative research.*

We realized that we did not know the literature on collaborative research so we moved away from this topic. I am aware now as I write that we did not try to explore collaboration as it pertained to us and our degree of connectedness. Rather, we chose the possibility of reviewing others' ideas. I wonder why? Would we have found the seeds of our own disconnectedness?

We languished in our language for the rest of the session. Offerings seemed to be disconnected from each other. Avenues of pursuit led us back to earlier talk. Barriers seemed to be at work. What were they? I called for reflection. Through the reflection further insights about process were illuminated (underlined below). The reflections became the focus for learning.

### **Reflections**

The reflections began with wondering about our desultory conversation, an effort to work with process. Our reflections revealed how easy it is to intellectualize a topic that ultimately becomes

disengaging for participants. Through this conversation I became aware of how easy it is for me to intellectualize and abstract away from the difficulty of remaining rooted in lived experience. This is also true in inquiry projects when it seems easier for participants to avoid the mire of experience by focusing on other things. Avoidance sometimes takes the form of focusing on commonality such that the person with the very diverse perspective ultimately leaves the inquiry; or management staff, in hearing the painful experiences of clients, respond that system barriers cannot be changed, or critiquing method to minimize the voice of clients. What may begin as little barriers strengthen in height and depth as they remain unaddressed.

*Louise: It's true what were we doing initially, the idea of brainstorming around naming the practice, seemed to be what we needed to do. We kind of explored that and discovered in our exploration that we needed to look at the literature to help with naming the practice.*

*Lynda: Did we all agree to that? Or is it low energy - that is the other thing to wonder about.*

*Ruth: There is definitely low energy - I felt very tired- I have a 2 o'clock low energy time. I think I am coming out of it. But I think that partly it also was the conversation was an intellectual conversation which it needed to be and that is partly what it is right but the morning/earlier conversations were more grounded*

*in experiences. Everything has to be grounded in concreteness. Concrete experience.*

*Lynda: That is really helpful for me because what we tried to do then was do a task in the absence of experience and it never works. We didn't come at it in a way that was true to the study if the lived experience that we say is really a key - so there you are and it doesn't work.*

We went for a long walk through the woods, scuffling leaves, quietly breathing deeply of the cool air, conversation sporadic. We returned from our walk invigorated and ready to go forward.

### Session Five

#### Focus: Trust is More than What Appears

The dimension of trust had arisen for us during Phase 1. We had come to appreciate that trust moves around. Now we wanted to understand more about its essence. We opened up the experience of trust appreciating Louise's words, *Trust is more than what appears.*

*I said trust moves around and it has touched chords with them. I think that it is something that we want to talk about.*

\*\*\*

*It touches chords because I think it is true to lived experience. Because when you think about it in the relationships that you have with people, it is not a matter of getting their trust and then you have it forever, you can fall out of their good graces.*

### **Emerging Themes**

#### **Getting trust**

**How do we get trust when we meet as strangers or outsiders?**

*Let me talk about the way I felt when she did not have confidence in our practice, because we didn't fit her image. How that made me feel is she is only going to trust me if I fit with her expectations. But if we only get trust, we can't earn trust by fitting into others' expectations, that is where our practice is jolted.*

*So that leads me to wonder how do we get peoples' trust?*

\* \* \*

*The times that you would feel that trust was reachable would be times when some honest sharing going on where people felt they were really hearing each other and to make it more personal- she and I, she and Barbara, felt they were hearing each other.*

#### **Competence-based trust**

**Trust can be established on the basis of 'expertise'. Yet when as an inquirer, I want to be in a relationship of mutuality, trust can come and go.**

*Do you think there are two kinds of trust? When the literature talks about trust, there is conventional trust and that is based on the competence model, a professional model, of practice and that means that you come in, you present, you rest, you offer, you speak with authority, with confidence, with expertise, you outline, they are familiar with the process, they get trust that lets you know what you are doing - so that's the conventional trust. So we don't get conventional trust because we enter in a spirit of not knowing, so their trust is disrupted at the outset, because if these guys don't know then what do they know - we enter with the spirit saying that it will emerge. How do we get trust at the level of relationship trust when we are asking them to enter into trust at the relationship level.*

*\* \* \**

*Trust can either come from a feeling level or a head level. And the trust that comes from the head level is the one that comes and goes.*

*\* \* \**

*But the kind of trust from the head would say, when you don't act in ways that conform to an image or an expectation of what should be happening, then they withdraw their trust.*

### **Personal trust**

**Trust is also a feeling we have about a person, their genuineness, sincerity, caring, honesty. Personal trust requires revealing oneself, being vulnerable to another. A connection is established which gives each other the benefit of the doubt when experiencing an unfamiliar situation.**

*And when you are grounded in that you can go in unfamiliar territory you can trust if there is more than what appears.*

*\* \* \**

*Trust requires revealing yourself. Trust at the feeling level requires you revealing yourself. It is revealing yourself in the context of what the work is. That is always what it is about.*

### **Reflections**

*Louise: I experienced my tiredness. This session I had an experience of trusting that an exploration of trust will lead us where we need to be. I was aware that I wasn't struggling so much with the topic "What we need to talk about." I experienced myself as trusting that exploring the topic will lead us where we need to be. And when I asked myself that question, that experience of exploring trust, I was very much aware of not knowing where we will end up and there is no map. That whole notion of explorer, the inquirer as explorer.*

*Lynda: Trust is about my feeling of human safety. That you will not take advantage of my vulnerability, so that my spirit is safe with you and I would not be wounded intentionally. I think we all wound inadvertently because who can know the deepest of others if it is not shared. That you would not intentionally take advantage of my vulnerability.*

*Tread carefully with each other out of caring. It is that caring piece, how do we create caring for the places that we might tread on unintentionally? What*



*prevente me is a lack of assurance about myself and a sense of being wounded at my deepest place.*

*Our needs don't get met but it also pushes hers away, so if trust is about feeling, you can never move the trust deeply if moving into feeling pushes the other away. Because her needs don't get met and our needs don't get met and then we can never get beyond that and so it does require that painful revelation of ourselves.*

*Ruth: I didn't want to say anything about me and trust. Thinking back to the idea of the connector in this is an interesting one because I feel the connection came through Louise and our first conversation I just felt so excited about understanding in a total different way. I don't feel like for me there has been a trust issue with either of you at all. I think the most difficult issue and this may need to be explored more, and I don't know where trust fits into these conversations because it has to do with money. I hate those conversations, we all hate them on some level, but I don't know what the trust.....*

## **Session Six**

### **Focus: Everything Happening at Once**

**In our inquiry practice, most of our projects have involved learning about what difference programs or services make for people who live in the inner city. Some of the services we sought or are seeking to**

understand are needle exchange, nursing outreach, a drop-in centre for women working on the street, the experience of aboriginal spiritual and cultural events. To be engaged with people who live life in the moment, it was necessary to be present at the places they gather at a time when they might be there. It was an intentional 'hanging around'. We wondered about the meaning of 'hanging around' as data collection. The conversation of Session Six opened up around data collection and the meaning of 'hanging around'. Through our conversation, we were again realizing that everything is happening at once: the relationship, data collection and interpretation.

*Within that notion of connectedness we are oriented always to the question of interest and we are having conversations that become deeper understanding and interpretative and informed in the moment. We are saying the whole process is the connectedness, hearing, listening and responding, interpreting and confirming it with everywhere we go within the place of the project whether it is a meeting, an informal conversation, hanging around or whatever.*

\*\*\*

*Listen to ourselves. Whether it is gathering data, whether it is the contracting, whether it is the interpretative process, however one would come at an evaluation, we have identified a process that is present everywhere, in every moment, and in every moment there is an empowered response.*

## **Emerging Theme**

### **Weaving together data collection and interpretation**

Phase 1 was demonstrably an experience of treating inquiry as a series of stepping stones: first, data collection, then analysis and interpretation, then etc. etc. Here, in Phase 2, we became aware that everything is happening in the moment of the conversation. How do we capture the moment in its completeness?

*It is different than collecting data of the survey kind because you are offering something back all the time, not just you but....*

*\* \* \**

*We are also saying that data comes from dialogue aren't we, all that happens in the moment in the dialogue.*

*\* \* \**

*There is a mutual process, it is a mutual process, it is in the moment...*

*Checking and getting that validity checking. Yes, it is confirmed interpretation.*

*\* \* \**

*If this mutual process is as powerful as we have really experienced it today, that powerful experience of learning in the moment, how do we remember that given what we said earlier that our task as inquirers is at least to keep the history and the memory? How could we? It may not be the whole picture, but*

*how could we keep these bits of memory as we went so that by the time you were finished you would have more interpretation of the whole?*

**Interpretation is an integral part of the conversation. It cannot be separated out into compartments. Interpretation is also about generating shared meaning for action. As we attuned to everything happening at once, it began to be possible to see how the 'two chances' we get at developing a shared interpretation could be managed. The awareness of two chances for interpretation was a sudden awakening. When we looked back over all of our projects, the time and resources for developing shared meaning never exceeded two opportunities. More understanding of this notion evolved following Session Six and is further discussed on page 153.**

*This is interpretation in the moment and maybe that is something else we need to talk more about. If shared interpretation is in the moment, and the larger notion of shared interpretation with other stakeholders - given that we only get two chances- ( I have kind of figured that out, that we never get more than two chances to take it back,) you might not need more than two if these interpretations of the moment have become quite understood in that process. You might bring the interpretations back to the inquiry group through which the shared meaning emerges.*

\*\*\*

*It would say to me that what the practice should now start including is bringing back to them the learning and change with much more immediacy. Within a project, this would now require an immediacy of learning and an expectation of action which would then engage them in the process. That would be action in the moment. The action then would move everything up. By the time you bring back this next group, you are going to shift them to the next place, in that immediacy so by the time the thing is over, there is no report. This action has all happened, all there is then is the collection of process recordings.*

**We wondered how the experience and the outcomes of the conversation could be reflected in writing. We did not know what writing might look like; we had a glimpse, however, that it could be done.**

*We could demonstrate movement by documenting the actions that have been taken in the moment. Then your final report outcome stuff is just phenomenal, it is all outcome oriented.*

**\* \* \***

*It is all outcome oriented, not recommendations for results down the road, it has all happened already.*

### **Reflections**

**Lynda: *Maybe what we understand is already known. It doesn't seem so difficult. Maybe it is already known and I just didn't know it. So it is that sense***

*of self doubt about - what is this? But when I got past that, then I could say that I have really had an experience of getting what was needed in the moment and beginning to see that I can believe in trust in that process . . . had an experience that out of that came the other thing that I needed to have done. And I also have had an experience of the thesis being done in the moment, so as we have outlined our process of working with the experience of conversation of supporting one another, we have moved to action and we now have interpreted the thesis, so we don't need a lot of meetings now to interpret the data, it is all here. So the only thing that is left is the writing, so then I am saying, so is writing the final conversation that we need to have, then the thing is done.*

*Louise: I experience this sense of having a conversation that is a gift to ourselves. Such profound, intense feeling of excitement as we get clarity around our practice that grounds our different successes that we individually had at different stages. In my heart there is more appreciation for this group. I feel so lucky to be here, to be part of this, I feel closer all the time. It is like an experience of caring for ourselves, like the us and seeing myself within this "we" and how I can see myself as different and safe. The clarity... That profound, articulating a practice that grounds our different successes and yet I have this sense that we are different and the same.*

*Ruth: It is interesting because I think I said the almost identical thing but with different words. I started out by saying that a feeling that the pieces of the practice are becoming much more whole, it is not about pieces of practice, it is*

*about an orientation and it is what we named a long time ago about an orientation, but without knowing what we meant. It is about a process that is applied to all the facets of work. It is compelling, convincing, validating for all of us because we can then see how the different things we are doing are the same, of equal importance.*

By the end of Session Six, clarity about our practice was emerging. Two points in our reflections were key. The first was that I had had an experience of what work is like when it is completed in the moment that you have, including interpretation. The challenge would be to act upon this knowledge in my practice. Secondly, as Ruth commented, we began with a general orientation to our practice. The details of the inner workings of the orientation had now been named. Writing up the memory of our experience was the remaining task.

## Session Seven

### Focus: Writing

*What is the writing that becomes meaningful for learning for the people who have lived it? What is the writing for the people who have lived it to offer it to someone else for their reflection? What is the writing that is needed for the larger community?*

**We felt we had time for one more session at Birdwood before we headed home. It was like squeezing in the final piece to complete our work, writing. Writing was profoundly important to us as we had all experienced that our writing and/or presenting of reports did little to result in organizational change. While participants demonstrated learning and change through the experience of participation, how were we to have an impact on others in a significant way given that program evaluation is about something larger than the individual?**

**We struggled with how to write given the elements which had emerged for us: process generates action, the necessity of confusion, each moment is complete in itself, reflection as *creating the space to connect with yourself*, two audiences for writing ( for those people who are living the experience and for those people who are external to the experience).**

**We were in the midst of our struggling conversation when a knock was heard on the door. It was the Innkeeper with her grand-daughter. While she had an interest in us admiring her granddaughter's Halloween costume, she really needed to tell us that it was time for us to leave. We had an experience of just how life intervenes! We immediately concluded the session and packed up to go home aware that we had imposed on another's hospitality. No time for reflections. Just a recognition that we needed to return to develop some understanding about writing.**



## **Endings**

**We left Birdwood aware that we had learned and that we would immediately begin to take action on those learnings as we continued with our projects. I was left with the task of reviewing the transcripts and developing a written interpretation using the transcript data and an articulation of what we had learned for my colleagues' reflections and interpretations. My sense was that a consensual interpretation had been achieved through our dialogue. I left Birdwood, excited, energized and confident that writing, as memory to our experience, could begin.**

**I believed that the writing would be easy! I was not attuned to the disjuncture that had already begun.**

## **CHAPTER FIVE**

### **LEARNINGS FROM THE BIRDWOOD CONVERSATIONS**

#### **Introduction**

**From my experience of the individual sessions of the Birdwood Conversations as well as what I had gathered into myself from Phase 1, I came to understand a number of features about our particular interpretive inquiry practice. I offer these ideas to you now, for your reflection, open to your response in the spirit of a deepening conversation.**

#### **Learning About Relationships**

***We embrace everything in the context of learning  
not in the spirit of criticism.***

#### **Relationships are the Work of the Inquiry**

**Relationships are central to the work of each inquiry. They are not something you do, or get, as an instrument to accomplish something else as is frequently suggested, "a purposeful conversation usually between two people (but sometimes involving more) that is directed by one in order to get information" (Bogdan & Biklen, 1982, p. 135). While Bogdan**

and Biklen are talking specifically about interviews, I suggest that this notion is a conventional one which extends to all of the activities of evaluation. Rather, I suggest that it is through the relationship experience that activities become identified as necessary to the overall inquiry enterprise. This means the primary work of the inquiry is with the interactions between and among participants. The practice, then, is a relationship-based practice. An environment in which relationships flourish is one in which people feel safe to be themselves, where people are equitably included, where diversity is valued and where barriers are addressed.

Relationships are not static. Being in the flow of experience, relationships are tumbled about by who we are in a given moment, by life's competing urgencies and by the environment in which we find ourselves. In this inquiry, as in other projects, I was not always attentive to the indicators of diversity within relationships. What I have learned is that by not attending to relationship issues, a disjuncture results which affects any outcomes of an inquiry. This was true for this project noted during Phase 1- by not addressing Barbara's experience and perspective in the beginning and throughout the months that she continued to voice her concern, I lost her participation and the opportunity to work with the knowledge arising from the diversity. Focusing on 'task' did not yield the most desirable result. Relationships are, indeed, the work of the inquiry. When we set aside relationship issues, I believe we also set aside the possibility for transformative change, individually and collectively.

### **Qualities of Our Inquiry Relationship**

**We understand an interpretive inquiry relationship is a mutual teaching/ learning experience. It is through this mutual relationship that understanding or knowledge arises to the anchoring questions. A number of qualities necessary for developing and sustaining an inquiry relationship were illuminated for me:**

- a genuine interest in and responsiveness to the participants**
- a willingness to reveal yourself to another**
- a readiness to be emotionally present**
- demonstrated trustworthiness**
- a willingness to learn (i.e. to revise what we already know)**
- a commitment to reflect on experience.**

**That these qualities would be illuminated in this project is not surprising given that it is a practice of four women working in projects that involve primarily women. We exist within the embedded assumptions of our culture which Gilligan so neatly captures.**

**Sensitivity to the needs of others and the assumption of the responsibility for taking care, lead women to attend to voices other than their own and to include in their judgement other points of view. . . .Thus women not only define themselves in a context of human relationships but also judge themselves in terms of their ability to care. (Gilligan, 1982, pp. 16-17)**

**There exists a repeating refrain that relationships with the qualities identified above, take 'time', that is, develop over a period of time. It is as if not much is happening that is important until time has passed. I believe that this rather linear perspective on developing relationships can be re-framed to say that meaningful relationships can be created in the one moment in time that you might have together.**

**The qualities of relationship are easy to say, not so easy to be in tune with and act upon in the complexity of human experience. Our attention was particularly drawn to the question of trust. It is so necessary and yet so transitory, as we discerned during Phase 1.**

### **Trust**

**Trust is identified as an essential dimension of any research endeavour (Janesick, 1994) and, as Fontana & Frey (1994) say, even when trust is gained, "trust can be very fragile" (p. 367). Trust, first raised as an issue during Phase 1, was an intentional conversation at the Birdwood retreat. I have come to understand four features of trust: trust is oriented toward the future; trust moves around; trust is about not being wounded; and trust is about doing what you say you will.**

**I offer these understandings in the spirit of an opening conversation as I continue to struggle to understand the essence of trust.**

**Trust is oriented toward the future. Trust is a quality of relationships that has been obtained in the past, added to in the present and then offered into the future relationship.**

**When the Thesis Inquiry Project began, we had some degree of trust with each other from our past experiences with each other. There was sufficient trust to agree to work together, to agree to undertake this project, to agree to learn together. We had enough to get started. This is true for all inquiry enterprises. Through the selection process, decisions are made about the fit of people for a project. It may be based on academic credentials, a track record, the adequacy of a proposal or in almost of our work, trust given because of long associations in the community. Some degree of trust, that is confidence in the other, emerges from these opening conversations. Perhaps this is the notion of rapport.**

**. . . it becomes paramount for the researcher to establish rapport. He or she must be able to put him - or herself in the role of respondents and attempt to see the situation from their perspective, rather than impose the world of academia and preconceptions upon them. Close rapport with respondents opens doors to more informed research, but it may also create problems....losing his or her distance or objectivity, or may go "native" and become a member of the group and forgo the academic role. (Fontana & Frey, 1994, p. 367)**

**We found, however, that trust that stays at the level of rapport and distance, defined by role expectations and conventions, is not sufficient for**

the kind of mutual relationship necessary to an interpretive inquiry practice. This is a kind of trust which is competence-based, which is different from trust that is personally-based. And much as Lincoln and Denzin (1994) hopefully assert that, "Today, no one takes seriously talk of "going native," (p. 581) that has not been my experience in the practice community. Indeed, this expression is actively used.

Trust moves around. As noted in Chapter Three, trust is not a static quality that you get and it remains the same. We found during Phase 1 that trust comes and goes. During the Birdwood conversations, we wondered whether this movement was in the experience of trust which was competence-based. Trust seemed to arise easily around ideas which were understood, for example, familiar understandings of evaluation. Distrust had a way of surfacing when those expectations were jolted.

Trust at the personal level is about engagement at the feeling level such as feelings of being cared about, being genuine, being vulnerable and being honest. This kind of trust also moves around. What I have learned is that trust is dependent upon the degree to which we feel comfortable with our selves and others such that we can sustain a feeling of discomfort without withdrawing into ourselves. When withdrawal begins, trust is shifted.

Trust is about not being wounded. Mutual relationships require sharing oneself, that is sharing our vulnerabilities. Until we feel safe that

we will not be wounded in our spirit, barriers to revealing ourselves are in place. During Phase 1, Barbara did not feel safe to reveal herself and, consequently, withdrew from the project. At Birdwood, Ruth, Louise and I were ready to take a risk with each other. By sharing what was important to us, we were able to move into a place of deeper understanding.

Trust is about doing what you say you will. Trust which gives itself to others toward an unknown future begins with doing what we say we will or offering explanations as to why commitments cannot be made. Trust requires that we be constantly present to each other about what is impacting our connections with each other. Throughout my practice, I have become more profoundly aware of the extent to which I operate on assumptions, assumptions which are not always conscious and which remain undisclosed. On the basis of assumptions I assigned responsibilities to myself and/or others without being clear about intents or needs.

In the Thesis Inquiry Project, I made assumptions about my connections with my colleagues without appreciation for their competing urgencies. As a result, barriers were raised within myself which I could feel as a closing door and I found it hard to stop the door from shutting altogether. In her interpretation, Louise offered the idea that perhaps I was looking at trust from the perspective of contractual relationships, and this might be too limiting.



**Regardless of the perspective employed, as a feature of a mutual relationship, trust requires particular attention as it is hard to recover, once lost.**

### **The Self of the Inquirer is Engaged**

***You should not have to feel like you are giving up yourself.***

**An interpretive inquiry practice requires that the inquirer is as much a participant as are all others in the inquiry. Each participant brings her or his particular life experiences and knowledge to the mutual effort. This means that the self of an inquirer is fully present and mutually involved. To be fully present requires that the self be experienced as complete, that is, it cannot be split into compartments or roles. "The self existing always in a now is one that knows itself as having been and as going into existence and into encounter" (Niebuhr, 1963, p. 93). Thus an inquirer cannot stand outside of herself/ himself as in an outside facilitator or observer to another's process. We are in it together!**

**Practitioners within an interpretive paradigm can readily agree with the idea of being in it together given a commitment to the view that we construct and re-construct our social realities as we engage with each other. Unfortunately, this perspective remains mostly foreign to the larger community and, further, continues to be supported by evaluation literature which honours the ideas of closeness but not too close (Ely,**

Anzul, Friedman, Garner, & Steinmetz, 1991) and of not being able to be yourself, "as a collaborative evaluator, I never get to whine or be small minded, even when people are systematically undermining a carefully wrought study. . . .As the mother of the process, I must be the person calmly above such pettiness, working tirelessly to make it succeed" (King, 1995, p. 98). What creates the problem for me within an interpretive inquiry practice is the view that the inquirer remains separate from the other participants wielding a kind of power on that basis.

### **Learning about the Meaning of being 'Anchored in the Work'**

*Being grounded in the concrete of the day-to-day.*

Inquiry relationships are the heart of the inquiry, anchored by what we are to accomplish. Being anchored in the work means remaining consciously attuned to the questions and approaches around which the inquiry is focused. Much as I began the Thesis Inquiry Project with a desire to act within an interpretive inquiry philosophy, Phase 1 compelled me to recognize that I was still caught between two worlds, data collection followed by interpretation and analysis, followed by, followed by etc. etc. In the reality of day-to-day work, I lost track of the need to "continuously refine and extend the design - to help it unfold" (Guba & Lincoln, 1989, p. 180). In my distraction, I slipped with somnambulant ease into the very familiar habits I wished to change. I was most forcefully impressed with

**the necessity of remaining conscious to the experience in the moment as it pertained to what we were gathered to do together.**

**Being anchored in the work has two dimensions. The first dimension is being connected around what we are gathered together to do. Developing and sustaining a shared understanding of what we are here to do together is essential. This is not anything new, of course. LaRocque, Boivin and Downie (1993) say, "a common purpose is essential to successful collaborations" (p. 8). It is not enough, however, to assume that the words that state a purpose are similarly understood by all participants. It is necessary to discern through dialogue what is important and meaningful to participants as they meet together. This is the opening conversation which begins the relationships through which meaning emerges.**

**The second dimension about being anchored in the work, is that the conversations are grounded in the concreteness of day-to-day life. The concrete experiences which occur in the day-to-day lifeworld of the participants contain the dialogue from which to pull relevancy for the work at hand. In the final session at Birdwood, we had an experience of Louise bringing into the conversation that which had already begun in the car driving to Birdwood, as the place to start. The work became grounded in the concrete, that is, finding a focus in the moment which is related to the work, rather than oriented to a prescribed agenda.**

## **Learning About the Meaning of Process**

*Once we had the connection, the movement didn't take long to get started.*

**Process is a word which litters the language of inquiry experience with dismaying regularity. It is generally understood, I think, as a way of doing something, to "progress, advance" (Webster, 1970). Within this notion, process is the pipe between the in-flow and the out-flow transformed into steps which guide action toward achieving a result (Fawcett et. al., 1996; Fetterman et, al., 1996; Levin, 1996). Webster offers an extended meaning by including a definition of process as meaning "something going on, a natural phenomenon."**

**With this definition in mind, Bohm (1980) provides an interpretation of process which is a way of seeing and communicating what is in the flow.**

**I regard the essence of the notion of process as given by the statement: Not only is everything changing, but all is flux. . . . That is to say, *what is* is the process of becoming itself, while all objects, events, entities, conditions, structures, etc., are forms that can be abstracted from this process. (p. 48)**

**I understand process to be a continuous flow, a totality of experience in which everything is happening at once and is moving in**

some direction. This process in an inquiry relationship is contained within the dialogue and framed by the work we come together to do. In order to talk about what is in the flow, we pull from it ideas, concepts, dimensions, parts, etc., so that we can examine them in some sort of bracketed way in order to talk with others about what we experience.

These concepts pulled from the flow cannot stand by themselves in the thinness of air. They must fall back into the flow to be altered by the continuing dialogue, "the purpose of which is to go beyond any one individual's understanding" (Senge, 1990, p. 241). In the continuing dialogue, pathways are opened "to change and clear space for organizational transformations by changing the inner landscape" (Brown, 1995, p. 155). My attention was drawn to understanding structures that might be contained in the flow underneath the words of conversation.

### **Each Conversation Contains a Complete Process**

*We have identified a process that is present everywhere, in every moment.*

As we explored the possible structures contained within a process, we also came to understand that all the elements of the process are present in every conversation, and across all the conversations that take place. Each conversation does not stand by itself but is connected to what has happened and what will happen. Connection is contained within mutual relationships and within the knowledge which arose from the

**conversation. In this way, each conversation becomes additive to the next. Imagine each conversation as a bead on a necklace, complete in itself yet connected to a larger whole.**

### **Learning About the Elements of the Inquiry Process**

***We are offering a process of transformative change.***

**What follows below are the abstracted concepts which have helped me to name and work within the flow of dialogue that unfold in the inquiry process, appreciating that these bits, too, will change within the currents of our continuing conversations.**

**Every moment has similar underlying structures which are now offered for your reflection. As you read the interpretation of the structures which surfaced for us out of the process, I invite you to remember a gathering, a meeting or a conversation in which you have recently participated. See it in your mind's eye as you read my interpretation of the elements found in every conversation. Do these elements resonate with your experience?**

**It is tempting to think of process as a linear experience. The stepping stone image comes to mind again. A desire for order and rationality, to be clear! Let's just accept that lived experience is a delight of interlaced experience. These structures or features of process are simply tentative structures held aloft so that we can talk together. They remain,**

however, embedded in the dialogues, indivisible. They are features, however, that I will explore in my practice as I leave Birdwood.

### **Discerning What's Important**

What is deeply important to participants is always present given that we bring ourselves into the conversation. "The whole past, in its many still unexplored forms, which the self brings into its present, is a past of responses to other beings and actions upon them in expectation of their reactions" (Neibuhr, 1963, p. 95). Being able to articulate what is deeply important for all participants in the work we do together is necessary if conversation is to move beneath the cover stories.

As we entered into the Birdwood experience, we had learned about the need to open up the question of what was important to each of us. In making a commitment to the Birdwood experience, we were prepared to risk sharing our vulnerabilities. For Louise it was the fear of being left alone. For Ruth, it was about having something meaningful upon which she could act. For me, it was about being accepted in spite of my limitations. Until we asked ourselves the question about what was important (and answered honestly), there were barriers in our conversations. A mutual relationship requires the ability to work in ways that support each other around what is important to us in a personal way. As we found in this Thesis Inquiry Project, as we have found in our other

projects, without addressing what is personally important, barriers arise in the relationship and substantive movement does not occur.

It is often difficult to establish a context of safety in which people are willing to risk sharing what is important to them. It is sometimes true, too, that we are not consciously aware of what is ultimately important about the task we have asked ourselves to do. Nevertheless, it is an essential structure that compels our attention.

Discerning what is truly important for stakeholders has been of concern for others. Mitroff articulated assumptional analysis (1983) as a way to search out underlying beliefs. Guba and Lincoln (1989) outline a hermeneutic dialectic circle process which is intended to "expose and clarify" (p. 149) different views upon which, hopefully, consensus will emerge, and Reason (1988) elevates group dynamics to consciousness.

In our practice, we became attentive to illuminating what was important to participants about their personal participation in relation to the anchoring question, through dialogue. This has depended upon a climate in which mutual relationships could be developed. Attending to the individual, however, is not enough. From the individual experience, it is necessary to understand what is important to the collective. Moving the individual to the 'we' is about discerning what ultimately collects us in our diversity.

It is usual to talk about purpose or focus for an inquiry. Purpose can be understood from a perspective of who wants to know what, for what purpose. Around this purpose, people gather to participate in an



**enterprise. Beneath this understanding of purpose, is a need to understand what it is important to the participants because this is the level at which effective learning and change occur.**

### **Necessary Confusion**

**Confusion, or incoherence as Bohm (1965) would say, is present by virtue of the diversity each participant brings to the inquiry. In my experience of this inquiry, confusion has four dimensions that require attention in working with its meaningfulness, the de-confusion of confusion!**

**Diversity of participants' meanings. Whenever a group of people gather to work together, initially, there is confusion by virtue of each person's interpretation of the meaning of language. Our perception is filtered through who we are. In creating a climate for mutuality, validating diversity, establishing a value that learning occurs through a willingness to revise our individual interpretation; then naming the confusion as necessary calls our attention. I have found that if I enter the confusion by validating it and opening up the conversation to a shared understanding of why we have come together, then acceptance of the feeling of being confused or uncertain occurs. Introducing confusion within an understanding of learning can be helpful.**

**Disequilibrium is necessary for learning.** "In order to facilitate the assimilation and accommodation of new experiences, we believe that disequilibrium is essential" (Cennamo, 1995, p. 34). This is the jolting experience, the disruption of what is familiar upon which we can begin to revise our thinking and actions. Assisting participants to receive the jolting experience as necessary for learning and to support them in what is often a frustrating experience requires attentiveness. There is more often a demand for orderliness, clarity and the comfort of familiar pathways.

**Sharing confusion/uncertainty.** As noted earlier, confusion is a feature of the process that arises whenever people initially gather. This is true for every occasion. Moving through the confusion does not necessarily mean that a great deal of time is needed. Into every encounter, however, people bring another set of experiences and learnings which can intervene or impinge upon the intent of a particular gathering. It is not an exercise in clarifying purpose of the given meeting or groping through an agenda setting process. Rather, it is at the level of clarifying meanings and experiences with participants, in that moment, of what is important to them. Thus, the importance of understanding and responding to the conversations that participants offer is the starting place.

**Conceptualization.** Clarity emerges from the confusion of conversation through conceptualizing what is happening and its meaning for action in relation to what the work is anchored in. With a sense of shared clarity, movement is experienced. It is that sense of "aha." Now I

**understand! And I understand differently than when I entered into the conversation.**

### **Making Meaning**

**In being attentive to the process at Birdwood, my colleagues and I were in a constant attitude of listening, hearing, interpreting and offering to each other as participants. We offered our understandings in the moment. We also, between one moment and the next planned moment, reflected as a team on the experience, added to the understandings and documented our insights to offer to the group. Sometimes these 'insights' formed the basis for another conversation, as in "the topic arises." Sometimes they were simply naming or reinforcing our existing practice. What I began to understand at Birdwood was how the topics which arose from the reflections came to be the connecting current to the next moment. Sometimes, the topic arose from the immediate conversation. I began to see that it was the reflections that focused learning into action. What imprinted itself into our memories, became the very thing we could take action upon. With this recognition came an appreciation that I did indeed have everything in the moment, the 'data, the interpretation, the action. My concern was how to achieve "effective action under real-time conditions" (Argyris & Schon, 1974, p. 4). I was very aware that action did not happen with written words that were distant from the process and from the participants from whom understanding was gleaned. Action**

resulted from what affected the participants in the experience of the conversation. This became conscious through reflection. Action was embedded in the dialogues.

### **Reflection-in-Action**

When we arrived at Birdwood, we introduced reflection as a way to be intentional about what was happening in the moment. At the end of each session, we took a few quiet moments to reflect on what we had experienced in the preceding dialogue. Schon (1987) writes about reflection-in-action as "thinking back on what we have done in order to discover how our knowing-in-action may have contributed to an unexpected outcome" (p. 26). The question we asked ourselves was not focused on action per se, but what had been our experience of the moment, reflection-on-experience.

By focusing on our experience, we found that we were remembering those aspects of the conversation that touched us in some way, that we were then moved to write down, speak about and then to act upon. Our reflections contained memories of our internal experience as well as what affected us within the content of the discussion. The individual reflections became a collective from which the next area for focus emerged. What we were learning was what Winter (1989) had already articulated: "'action' is not 'behaviour' (the effect of cause) but 'praxis' (the creative implementation of a purpose)" (p. 51). Our

experience was as Boud & Walker (1991), define, "a continuing, complex series of interactions between learners and the learning milieu, unified by a reflective process which assimilates and processes the learning potential of the environment, and can move learners to take appropriate action within the experience" (p. 18). The action we took, came out of the moment of its realization. We began to wonder if we could build upon the actions arising from each conversation and if these immediate actions were not the learning and change process itself? I was aware of my awkwardness in introducing reflection as an activity. Appreciating that meanings arising through reflection "are used and revised for the guidance and formation of action" (Blumer, 1969, p. 5), it seemed to be important to offer reflection at a point when I was feeling stuck. I puzzled how to introduce reflections without it being a "facilitated cycle of action and reflection" (Marsick, 1987, p. 3) or from an action research perspective which names, "a spiral interactive process in which actors identify a problem, plan an intervention, act, evaluate the action, and then re-evaluate the original problem statement and plan based on results" (ibid., p. 4). I was nervous about processes which separated the facilitator from the process and which are, in effect, pre-determined structures steering the process, not grounded in relationships.

## **Learning About Writing as Memory**

**We had recognized that written words alone did not move people into action. It was one of the reasons we had come together as a group. Our experience had taught us that our written abstractions of any sort were not the instruments of learning and action. We tried! Within our projects, we tried every approach we could think of in our activity as inquirers to stimulate and facilitate the conversations which would engender learning and action. It mattered little whether we wrote discussion papers, final reports, summaries of meetings, progress commentaries intended for reflections and learning or reconstructions of meetings. Abstraction became disengagement or objectification (Bergum, 1994). Stories of the experience of participants, particularly consumers of program activities provided glimmerings of movement in others but never sufficient to overcome the weight of conventional organizational life. How excited we were with this awareness - that writing was a way of documenting achievements, not making recommendations. We could now re-think inquiry reports. We were all too familiar with reports that sit on shelves, unattended. Implementing change in programs on the basis of evaluations has long been an on-going discussion. If learning and action occurs through the process of the dialogue, then the place of writing is as the memory of that learning and change. As a memory, writing serves as the place for beginning the next conversation. This means that ways of providing immediate documentation became**

necessary. In our practice we began experimenting with formats that could capture the discussion, learning and action that occurred in every session.

All research approaches offer suggestions as to what writing needs to look like to communicate learning/findings. Phenomenology is heavily imbued with descriptive qualities and literary texts, narrative has a framework for telling stories with a plot, scene, narrator and time as necessary considerations, action research suggests a case study method. Reports are familiar outcomes of many approaches. I suggest that writing becomes the memory of what has occurred in the moment, the actions to be taken and the insights emerging from an interpretation of the process. In this way, writing is integrated with the experience eliminating the problem of disjuncture. We did not go further than this articulation of writing at Birdwood. Writing would become an area for further exploration and testing of these ideas.

We left Birdwood on a considerable high, ready to act on what we had learned. It was my task to write in some shareable way, what we had learned. I sat at my desk to write a first-level interpretation of meaning from the transcripts. Not unlike-like Phase 1. It was hard slogging. It was four months before I offered my colleagues a draft followed by a further draft two months later. Life had intervened in different ways for each of us and for various reasons I did not receive comment on my words. It was a painful time because I was still thinking that I was writing something that would be co-authored.

**In my reflections on this experience, however, I recognized that I had become distanced from my colleagues in the writing. It was not unlike what happens in other inquiries when the writing is separate from the experience and life intervenes. Wasser and Bresler (1996) commented on their experience this way:**

**It's important to note that, while our case study description focuses on one intense year in which we were simultaneously engaged in data collection and data analysis, the process of writing up the results extends over a much longer period of time that does not include the same group members having the same relationship to each other. (p. 12)**

**Given the disjuncture that occurs between experiencing and writing, I learned that it is necessary to treat writing as an integrated and immediate endeavour. This means that the writing which becomes the final 'report' is actually finished the day the project experience is finished.**

### **Learning About Inquiry**

**This Thesis Inquiry Project has been all about illuminating an interpretive inquiry practice. It has also illuminated some over-arching issues in evaluation that I think are relevant for the field of practice.**



### **About Emerging Designs**

Our practice, as I articulated it in Chapter 1, was not unlike the 'procedures' named by other postpositivist inquirers (Cousins & Earl, 1995; Donmoyer, 1991; Guba & Lincoln, 1989). I thought that I understood about learning through experience, which would allow for more ability to respond to the unexpected. I did not, as Phase 1 dramatically demonstrated. No matter how tentative a 'design', I still followed along a path of sequential steps, the 'procedures'.

I found that there were at least three hurdles to get past if I was to be able to enter into projects which created the space for emerging designs. The first, of course, was myself and the desire to fulfill familiar expectations. The second hurdle was the proposal tendering process as it is currently practiced. The structures contained in proposals and the nature of the competitive process set up early barriers to sustaining space for designs emerging from the unexpected. Thirdly, as I have proposed earlier, mutual relationships are at the core of the inquiry process. It becomes necessary, then, to re-think the tendering process within the context of mutual relationships.

### **About Interpretation**

Within an understanding that interpretive inquiry is a social process, the act of interpretation itself must also be a social process. Thus,

attention is directed to the inclusion of stakeholder voices, to obtaining fullness and diversity of perspective, to re-constructing perspectives through dialogue and to arriving at shared meaning and/or clarity about diversity. These are essential qualities and heavy responsibilities.

In the experience of this Thesis Inquiry Project as well as other projects, we found there are only two chances at interpretation. The first chance comes in the opening round of conversations with the participants. Sometimes we are able to go back to participants with a written articulation of the conversation for clarification, confirmation and deepening the meaningfulness of the conversation. For most project participants who lived in the inner city, however, this process was not always possible. People living in the inner city are often transient, most frequently they are without phones and life is a day-to-day struggle of living in the moment. Scheduling meeting times is a mainstream notion that is not particularly relevant. Given that the interpretation is contained within the conversation, we were learning that confirmation of understanding and agreement to share the understanding was also obtained in the moment. This first chance was also the experience of Birdwood. When we left Birdwood, we had achieved an interpretation of our conversations to which we verbally agreed. At the end of the Birdwood experience, we could say, *We've done it!*

The second chance comes when the constructions of the first round of conversations are offered back to a stakeholder group. This notion of only two chances also held true for this Thesis Inquiry Project. The first

offering of an interpretation of Phase 1 was given to my colleagues. We held one conversation out of which we decided to undertake a second phase.

Another aspect of the interpretive experience is that which Wasser & Bresler (1996) define as the interpretive zone, "the crucible where researchers sift, sort, and consider the meaning of the fieldwork" (p. 7). As a collaborative team on our various inquiry projects and I in this Thesis Inquiry Project, we undertook another level of sifting and sorting. The learnings which were gleaned were then offered back to the key participant group for their participation in this tentative offering. This was the second opportunity for a collected interpretation. The constraints of organizational life - time, resources, interest and priorities - have not allowed for subsequent interpretive conversations. Thus, this means that in this second chance for gaining a collected understanding, learning and action in response to the interpretation must also be obtained. In this way what is subsequently written is not left to languish on the shelves because the writing will be the memory of a process already completed.

### **About Collaboration**

Collaboration is another of those words tossed about with the same ease as I did in my original proposal. I identified our group of women as "*the collaborative group*". Louise had offered us a way of thinking about collaboration, "the willingness to work together in uncertainty." It was,

however, an idea that remained flat on the table until Session Four at Birdwood. Even here we did not explore the meaning of collaboration for us as a group.

The Birdwood conversation positioned collaboration by naming it as an outcome of a particular kind of relationship, "*being connected*."

*We are saying that it is the end, the outcome. It names a connection, collaboration already names a kind of relationship that reveals bonds, interdependency, connection, it is not a means to an end, it is an end itself.*

This idea is opposite to what is often named as collaboration. Bruner (1991) saw collaboration as a way of achieving an end, a process with three requirements: jointly developed goals, shared responsibility and working in a way which utilized the expertise of every participant in the collaboration. Collaboration as inquiry requires continual reflection by participants (Reason, 1994). However collaboration is defined, the need for time in developing and sustaining collaborative endeavours is stressed repeatedly (Krentz, Kapuscinski, Browne, Cooper & Goulet, 1993; Wasser & Bresler, 1996).

The Birdwood conversation about collaboration was quite brief. It was part of Session Four which languished in a circular route, spinning on itself with no forward movement. We were content with seeing collaboration as naming a kind of connection that would be one of the inquiry outcomes. It had not occurred to us to wonder about our group as

a collaborative effort. What I can say is that we were working together in uncertainty, around a topic which interested us, and in a mutual relationship with each other. Is this collaboration? To have "methodological value," Wasser & Bresler (1996) suggest "there must be time allocated to the collaborative work" (p. 12) and this we did not intentionally do. What we discerned for ourselves was an activity of addressing relationship barriers as they impinged upon the conversations in the moment. Were we sufficiently critical, as Reason (1994) suggests is necessary for credible collaborative inquiry? What is the meaning of these distinctions when people are gathered together to seek understanding?

I raise these questions in the spirit of wondering what is helpful to an interpretive program inquiry endeavour which is inclusive but which unfolds over relatively short periods of time. We had not the time that appears to be necessary.

### Seeking a Setting for Interpretive Inquiries

Throughout this study, we were repeatedly confronted with the fit of our practice with the expectations of funding organizations. The kind of 'results' we were achieving was seen as helpful yet the demand for conventional evaluation designs, familiar behaviours of inquirers and final reports continued to be important. Being part of a setting amenable to a practice such as ours was essential. The organizational setting which matches this kind of inquiry is the learning organization first framed by

**Senge (1990). Such a setting allows for the possibility of creating "communities of inquirers. . . . [which] value living with their questions. These communities are sustained by a continued commitment to share this journey of exploration with one another on matters people care deeply about" (Ryan, 1995, p. 280).**

**There is an explosion of interest in and efforts being made to transform organizations into places which value and support the qualities of learning. Perhaps this creates a context for interpretive program evaluation, which also takes learning as its foundation.**

### **The Final Birdwood Conversation - An Illustration**

**Because of its distance from the earlier retreat, this final session at Birdwood became more than a single session to add to the others as we had done before. We now had another distinct period separated from the earlier retreat by our intervening lives of family, Christmas celebrations and work. These few words contain not only the "sheer busy-ness of our daily life" (Young, 1989, p. 174) but also that we had become changed through our experiences of these activities. This second retreat, then, became a distinctly 'new' opportunity to experience our practice. We committed this time at Birdwood to intentionally practice what we had learned in the seven previous sessions and of course, to add to our learning. It was a trial run, so to speak.**

**The following excerpts of conversation are intended to illustrate both the inclusion of learning into practice as we worked to understand writing. I have pulled from this experience the elements identified earlier. They appear more orderly than was present in the reality.**

### **The Anchor: Writing**

**Writing was the anchor for our conversation, the common purpose. In opening up an understanding of the meaning of writing there was diversity and disruption. Taking writing into the day-to-day meant that I needed to "practice" writing in this session.**

### **Understanding What is Important**

**Knowing how essential it is to connect with what is important for people as we undertake our work together, the final Birdwood conversation began with the invitation to talk about what was important. As Louise reminds us, the conversation had already begun on the drive to Birdwood. She interweaves this reality into the orienting conversation, an example of pulling relevancy from the concreteness of the day-to-day.**

***Lynda: That is important for me, that we can get this written about. People are beginning to ask what it is when I say I had a break through. And to get it written and documented - I have an urgency to do that - it is important for me. It***

*is important for me also to use today as an opportunity to practice some of our insight, so I would want to practice being attentive to process that underlies our conversation and that we use each session as a complete session in the moment in itself. So those are the things that I bring that are important to me.*

*Louise: What is important to me is that I have had experience already in the car, I need to allow the experience to lead me. That is what is important for me, because then I know it will be meaningful, to leave here with a sense of "I have learned something from the experience" that I have had the benefit of having. In other words what I need at the end of the day is to be able to have a sense of I've benefited from the experience I have had. I don't know what that looks like ahead of time. So it doesn't necessarily mean for me that when I leave here, being ready to write-I don't know what that looks like. All I know is that I need to allow, to make room for the experience in the moment to happen, to leave here with a sense of honouring it, learning from it, receiving the gift that was in it for me. I can't know that ahead of time.*

*Ruth: I have a need to work on the idea of process maybe much in the way you do Lynda, to try to practice aspects of what we are trying to bring into our practice more. You have already tried moving into practice but I still feel like a fledgling at it and it would be helpful to me to try to do what you suggested, trying to document our process on one page, on one of the tapes, that tried to say this is what we did and the action that came out of it in a way that you are suggesting and see what that looks like.*



In the experience of understanding what was important to each us, diversity became more apparent. I, in my comfortable habit, wanted to move to my task, how am I going to write up the Thesis Project? In the intervening weeks, between the Birdwood retreats, I had had an opportunity to try out some of our ideas, Ruth had not. She wanted to focus on experiencing our learning. Louise, who already journals daily, found my call for learning about writing, jarring.

*Lynda: You know , Louise, what I find really valuable in sharing what is important to us, was that when you started to speak, I became aware that I was talking task. As you and Ruth were talking, I have been trying to think, What is the experience that I need to pay more attention to? I think this movement to task is a way of avoiding the experience. My experience, even in the car and yesterday is an experience of being negative and judgemental and putting it on the other. I am wanting to find a way to reframe that at the same time as being honest. I don't do that very well.*

I undertook to write as we talked. On the right hand side of the page I created a column for noting process. On the left hand side, I wrote content notes as the memory of the conversation. I wanted to see if I could be attentive to both levels and intervene as I became aware of what was happening.

### **Being Disrupted**

**In opening up the conversation around what was important to each of us, we were disrupted by our diversity.**

*Louise: Every time the topic [ writing ] comes up I get the feeling of being jarred, when you talked I am jarred because I'm thinking I'm already having, I do have an experience of writing.*

### **Making Meaning - Clarification**

**Diversity created confusion in the moment. As we sought clarification, our words illustrated that we were living a mutual relationship: "I'm trying to understand," "that was helpful," "what I find really valuable is," "the conversation feels like trying to be equal." I saw us being real with each other, being honest about ourselves as well as being attentive to underlying processes. When I felt stuck in how to be additive (contributions which build on another's) to the conversation, I called for reflection. I was responding to a sense that there were barriers to movement.**

*Lynda: I don't know where to begin - I don't know how to have a conversation so, could we just stop the conversation and have a reflection on this hour?*

## **Reflection**

**Lynda:** *What I was aware of [when I called for reflection] was that I felt empty, I didn't know where to go, what to do next and I didn't have any ideas and then waiting to see if others had any ideas, or had a place to move and then having a sense of has it been enough silence, are we stuck, are is it just me who is stuck. I invited reflection. I don't know if you just complied with that or you also felt the need to stop and reflect?*

**Louise:** *I identified that the confusion was necessary as well so then it is a matter of being able to stay in it and recognizing that it is where we are. And asking again, and I think this is the common experience is our lack of direction in a sense of where do we go from here, is that need to know ahead of time and how that need to know ahead of time and how we experience our inadequacy is tied to that stuff and so I ask myself so what is it that I need to talk about.*

**Ruth:** *Here is what I've got and it seems very different from yours. For me it got me focused on the barriers to movement- like we have a loss of momentum and the loss of momentum had to do with the exchange that involved the need to respond to feedback. So what I was writing was how can we give honest feedback, a valuable comment even in the context of ourselves and our work, how can we receive it so it doesn't disrupt the movement? I think we experience this all the time in groups, whether we are working or personal relationships or anything - and I think it is always disrupting somehow. It resonated with me with lots of*

*experiences and then further reflecting that I had the experience of wanting to jump right in on the topic of writing but feeling like maybe that isn't what I should do because you were bringing it into maybe we need to focus more on the experience so I was feeling maybe this is too task oriented. Then it put me in touch with the whole thing about power relationships and our relationship.*

**An insight from our reflections was the necessity of confusion yet appreciating that confusion can also become a barrier to movement. Confusion can be frustrating and irritating. Moving through confusion to clarity required the qualities present in a mutual relationship: "equality," "I never feel that we are in a power struggle," "attentive in our listening," "valuing each other's input," "having the experience of the two of you adding to me," "feeling of continuity," "you aren't going to judge," "emotional safety," "feel valuable in our difference", "I feel anchored in our dialogue even when there has been days of no talk," "we need each other, I can't do it by myself."**

**By using reflection as an opportunity to pause, to try to understand what was happening in the moment and to share our experience, we were able to take action in moving forward. We did not remain stuck in a circular conversation.**

### **Relationship-Based Inquiry**

**I saw in our conversation that we were living an experience of relationship that was anchored in the work of our practice and framed by that practice. Our individual family lives and our friendships with others are different relationships with different people framed by, and anchored in other foci. This does not mean that we do not share what might be happening with each of us as we are affected by other realities of our life. It is a sharing, however, that is again anchored in our work. It is a relationship-based practice because it is through relationships that the work we are gathered together to do, emerges.**

*Ruth: I think it is important to recognize that what we are doing or talking about is that we are anchored in these qualities, the qualities that we are anchored in are going to be true of our relationship, of the way we interact with others, whoever those others are. And then to be able to be very clear that we are not just talking about a bunch of words, but we are talking about a practice that we can describe that manifests these characteristics.*

### **Writing - the Focus**

**In our unfolding conversation, we were focused on writing which rose to the surface of our conversation in this way.**

***Ruth: I had another thought as you were talking about wanting to move on. The thought was we are having the same experience of wanting to repeat the conversation and losing the memory. So we need the one page notes of the conversation that are going to be the memory that we have. What we are trying to say about the work is that what we need for ourselves and what others need, is the process notes that have the action identified.***

**Just how were we going to record experience both for the participants and for others who had not shared in the experience? It seemed to me that it was in the disjuncture between lived experience and the telling of it that movement was stopped. If writing is part of the process, what would it look like?**

***I mean this writing thing, that is something that occurred to me this morning when we were identifying topics, I think that the writing one is one that we have to deal with, but is it where does the writing fit then. I think that the writing as a process is the answer to that.***

***In a way, I think the writing becomes another part of the process, you think of it as affirming. It is those things we talked about this morning about the importance of being supportive because it validates their ability to solve their own problems and to make change or to move on the things they believe in, all that stuff. So it is not a report that is out here somewhere.***

Writing was now the focus of our conversation, our anchor, that is, what we wanted to learn about. Through the conversation, we become interested in the idea of two kinds of writing about experience. We did not find solutions.

*What is the writing that becomes meaningful for learning? For the people who have lived it they had it [learning] but for the people who have lived it to offer it to someone else for their reflection, how does it get offered to the larger community?*

*That is a struggle. People who had been part of the process understood its value, but they could not communicate it to their colleagues unless there was a relationship of trust. Conveying, sharing the learning is easier when you have that relationship with trust.*

*So that would tell me then that there is internal writing and then there is ending writing.*

*\* \* \**

*We have had a little bit of a clearer sense of what internal writing is - it is supposed to be moving to action. Or is it only supposed to reflect. . . . I don't know what it is supposed to do. Barbara and I tried hard to do a lot of internal writing, but I don't think that we used it effectively, so it must not have been the right thing. And yet some of the stuff when we go back and look at it is fantastic!*

*But people didn't read it, did they?*

*Well, I don't think that reading it is really a very helpful thing to do. I think that what it needs to be is something for action. Could the internal writing not be process writing with whatever piece of content really strikes one - I think we take a lot content as if it is quite important and it isn't. What if the internal focus was on movement and process?*

*\* \* \**

*Then you mean we would be putting out those things that needed attention in order for movement to occur.*

**Here, we are beginning to see that writing could orient to process so that the writing becomes facilitative to movement.**

### **Reflections Again**

**The call for reflections came again at the end of the session. What is raised to consciousness within oneself, verbalized and responded to, is the point at which action decisions can be taken.**

*Ruth: I feel a need for the writing to be our memory but also to move us to action in terms of what we just did.*

*Lynda: What I got out of it was the importance of the memory, for writing and for action and moving forward. I got out of it what a sense of synergy is about. Synergy comes when there is a natural building upon the other, so what I*



*experienced was a conversation of dialogue which was additive, each person pulling the next thought to another understanding and I also was aware that our feelings tell us about endings.*

*Louise: What I got from sharing our reflection is an awareness that there are different expressions of reflection and I became conscious that my expression of reflection is at an emotional level. I was moved. I can only get in touch with what moves me, and that is why I use the language like "touched." Once I could take in my heart, what touched me here and then I came up with these things. But what difference this has made to me is now I am much more conscious that there are different expressions, that different expressions of reflection.*

Reflection again opened up diversity of experience. By working with this diversity we came to see that reflection has two aspects, a head and a heart response from which action results.

*Ruth: It seems like it is easier to answer the question with action that we take on the head part than it is on the heart part, but there is probably action associated with both and this is the same struggle that people have with their work or will have in their work or will have when we work with them.*

### **Addressing Barriers**

**Responding to the head and heart of experience required being attentive to the barriers which arise and which prevent the forward movement. We experienced reflection as an opportunity to become connected to the space within, raise it to consciousness in the group and then begin to work with what emerged. Writing, then, became a brief memory of what has happened in the process, elevating to awareness that which we were affected by in the dialogue (and recording it) and identifying what we are moved to take action on. We then become accountable for following through on actions.**

## **CHAPTER SIX**

### **PULLING THE LEARNINGS TOGETHER**

#### **Introduction**

**For a brief moment, now, I look back on my journey of experience in a practice of interpretive program evaluation. What difference has the experience of the Thesis Inquiry Project made to my understanding of myself, evaluation/ inquiry, and my practice?**

#### **About Myself**

**At the beginning of this study, I was sensitive to living a split life, fractured by the notion of roles and an inner life largely hidden from view to others and in some ways, to myself. I was intellectually appreciative of the desire, or need for seeking integration of body, mind, heart, and spirit as necessary for living my life fully. I was encouraged by a research perspective that valued the inclusion of self.**

**The transformative jolt and experience of transformation that I had in Phase 1 supported my personal development toward integration and opened a way to see that learning in relationship with others is dependent upon the conscious inclusion of heart, body and spirit in addition to the mental or intellectual dimension with which I was so comfortable. My intent as I left Birdwood was to be conscious of, and intentional about**

**opening possibilities for mutual relationships appreciating that relationships are the work of the inquiry.**

### **Inclusion of Self In Inquiries**

**Including self in inquiries is very difficult. Yet, I have come to an understanding that including self is essential if inquiries are to generate the kind of learning and change that results in a better world.**

**Inclusion of self is about more than bringing one's skills and capacities to an inquiry. It is about more than fulfilling defined roles, for example, coach, facilitator, trainer (Fetterman, 1996). It is about more than "enhancing capacity" (Fawcett, et. al., 1996). It is even more than about mutual relationships as illuminated in Chapter Three. For me, inclusion of self is the willingness to bring oneself, fully, to an inquiry, visibly and explicitly. Ultimately, this means being vulnerable to one another. It is about supporting others to bring themselves, fully, to an endeavour, understanding that learning is dependent upon experience which includes body, heart and spirit with mind. Including oneself to such an extent in inquiries is not a stance generally taken in the evaluation literature. I do not think that we can begin to focus on truly hearing others (Lincoln & Denzin, 1994) if we are not, in equal measure, hearing ourselves.**

## **Understanding Evaluation/ Inquiry**

**You will have noticed in your reading, a shift from the word evaluation toward a more consistent use of the word, inquiry. You may also have wondered if our practice is evaluation at all? We wondered about that ourselves and at one point we began to play with other concepts hoping, I think, that we would be better able to convey our work to others. My own doubts have faded away. Our practice is evaluation. We are oriented to understanding something about ourselves and others as we participate together to address an anchoring question for learning and action. We are critical in our wondering questions. We are attentive to processes which support and sustain learning and action. Our experience has taught us, however, that the word "evaluation" is so embedded, most often, painfully in people's experience as measurement and judgment, that we have come to use inquiry to explicate the desire to understand. Interpretive inquiry is intended to convey a way of thinking which honours diverse individual perspectives, with a desire to seek a collected understanding.**

**I am aware that my expression of evaluation has changed which speaks to my change in thinking about and carrying out evaluations. In the prologue, I wrote, "To fulfill my responsibilities, I was interested in knowing something about the impact of services on clients and about how to improve overall service delivery in an effective way." Now, I have written, "We are oriented to understanding something about ourselves**

**and others as we participate together to address an anchoring question for learning and action." I believe that I have moved closer to being able to walk the talk of a relationship-based practice.**

### **A Relationship-Based Practice**

**When I reflect on the larger meaning of my experience in understanding evaluation through this study, I have come to understand the complexities of living life congruently. This means that one is true to self whether one is "anchored" by friendship, by a work activity, by a partnership relationship. To adopt a relationship-based practice as I had experienced it is an unremitting demand. How could I be continuously attentive to and conscious of myself? I found I could not. Even in this Thesis Inquiry Project, a research project anchored in learning about relationship, I was not able to sustain the kinds of behaviours that I knew to be necessary. To take on such a practice is to be committed to a continuous journey of learning fraught with struggle and not free of pain. At times it seems that the struggle is more memorable than the joy of learning and the actions for improvement which arise.**

**Is there really a choice? By virtue of being human, we live within relationships. Admittedly, this is difficult. It is physically and emotionally exhausting. Did I have the qualities that I needed? Did I have the stamina? Did I want to extend this kind of effort to every project? Could I care sufficiently about others to be on the line all of the**

time? What were the limits to my capacities? What were my boundaries in inquiry relationships? Did I have boundaries with my colleagues? Were there, indeed, inquiry questions in inquiry contexts in which a relationship-based practice was not helpful? Did I want to work in such projects? These are all questions which challenged me.

It is tempting to say that a relationship-based practice is an illusionary dream just beyond reach. And it is not surprising that the inquiry literature continues to maintain and justify a need for inquirers to be distant, to stand outside processes and to be contained by defined structures. This seems more do-able, somehow. Yet, to be part of inquiries grounded in relationships is to live life meaningfully, as "a way of reconnecting to meaning, purpose and the sense of wholeness and holiness that once, in another age, permeated the lives of ordinary men and women" (Lincoln & Denzin, 1994, p. 582). It is about the "concerns of spirit. . . returning to the human disciplines" (p. 583).

The qualities that we named as necessary to an inquiry relationship, are necessary for all relationships: a genuine interest in and responsiveness to the participants (each other); a willingness to reveal yourself to another; a readiness to be emotionally present, demonstrated trustworthiness, a willingness to learn (i.e. to revise what we already know), and a commitment to reflect on experience.

## **Working with Process**

**A primary learning from this study was a notion of process that is embedded in every dialogue. Process was defined using Bohm's (1980) conceptualization (see p. 140). Discerning and naming the features of such a process make it possible to work with the process in such a way as to expedite relationships and thus the inquiry. We had found that an Hermeneutic Dialectic Circle as articulated by Guba & Lincoln (1989) did not work in our experience. This was so even when we intentionally initiated a circle process. Two chances at interpretation seemed to be a constant. As I left Birdwood, I was keen to experience our concept of process. Would it prove to be helpful?**

## **Time**

**Because I had begun to realize that everything was present in a "moment," time became defined by the length of a given conversation. Seeing each moment as complete also means then, that in this moment of time, the mutual relationship is also complete. This view mitigates against a perspective that meaningful relationships take time, time as if we have to hold ourselves in abeyance until time has passed and a relationship established. Living the qualities of a mutual relationship means they need to be present in a first contact, even if the participants are strangers to each other. The question then becomes, how could I create a safe space, an**



**opening for vulnerability, for risk-taking - appreciating that this conversation is the only one that I might have? It was, and is, possible, as we have demonstrated repeatedly with client participants. Barriers seemed to be more present when working with mainstream expectations, conventions, habits and experiences of organizational life that have bred mistrust. What would we need to do to overcome these barriers?**

**Seeing time as compressed into complete moments, responded to the need to move evaluation and knowledge into action within the realities of the day-to-day demands of organizational life: too much work, too little time, too much confusion, too much change resulting in too much stress. Time for a stretched-out process, including contracting, identifying the research focus, elevating issues and concerns, deliberations to reach consensus, time to unpack and resolve, competing and diverse views and still arrive at timely information, was not possible. And, to repeat again, stretched out time impacts the possibility of implementation when knowledge is separated from those who have gained the understanding. What we seemed to have discerned was a way of working meaningfully and quickly.**

### **Writing as Memory**

**Significant to my understanding of effective writing in program evaluation, was the insight that emerged that writing serves as the memory or history of what has already occurred in the moment of**

experience. Distance between writing and experience sustains the disjuncture between the experience of learning and implementation. What would our writing look like within this perspective? "Arts-based research" (Barone & Eisner, 1995) opened new possibilities about how learning might be represented. This was particularly evident by the interest in narrative and phenomenology as methods appropriate to evaluation. The inclusion of these approaches in our practice world remained difficult. This is, of course, partly due to the entrenchment of science as the only credible approach to obtaining knowledge. The other difficulty is the ability to respond quickly with written stories so that they can elevate understanding and move that understanding into action. Yet we know that people are stirred by the stories they hear. What would/could our writings look like that told stories and documented process? Writings that would document memory and "outcomes along the way" (Clandinin, 1996, personal communication)? Would our representations be seen as credible? As accountable? As acceptable for the expenditure of moneys?

### **Creating Intense Learning Sessions**

What Birdwood revealed to us was that it was more possible and probable to create and sustain learning in settings removed from the competing demands of life. Not only were the competing urgencies reduced, but into the calmness we could be more present to ourselves and

others. I found that I was better able to hear beneath the surface and to demonstrate supportive behaviours such as asking the wondering questions, affirming others, offering my experience in the immediacy of the moment and revising my thinking. In this kind of a context, we broke through to a different pathway in understanding our practice. How could we introduce such an experience into the workplace? How would our initiatives be different from attending workshops and seminars?

### **Inquiry Contexts**

#### **Limits to our Practice?**

The inclusion of participants as equal partners in the inquiry relationship and in the learnings which emerge, is part of all interpretive inquiries. Thus, all interpretive inquiries must begin by illuminating what is important to participants. This, of course, includes the very diverse interpretations held by participants of evaluation itself. Are there situations or indeed, participants, for whom our practice would not be suitable? It is usual, perhaps, to immediately think that people who have impairment in thinking or talking would not be ready participants? We have not found this to be the case. Our projects have included working with people who have been brain-injured, who have addiction issues, who have experienced mental illness. Suitability is more a function of

acceptance of the value and effectiveness of an interpretive inquiry approach.

We have talked before about the limits of our personal capacities and our personal life situations. These two factors also limit the choices we make about the projects in which to be involved.

### Applicability

The Thesis Inquiry Project involved only women. That a relationship-based practice should become clearer for me is not surprising given that connectedness in relationships is a familiar knowing for women (Belenky, Clinchy, Goldberger & Tarule, 1986; Gilligan, 1982). I wondered what our practice would look like if men had been a part of our work?

### Could Practice be Sustained in Competitive Environments?

What we learned through Birdwood was that a relationship-based practice yielded possibilities for learning and action beyond what could be imagined or pre-planned. Our projects began, however, in relationships. Would we have 'work', given the dominant model of a competitive selection process by submission of written proposals? In our projects, in which we had been part of the opening conversations, the unfolding inquiry was freer of confounding and competing perspectives. Movement to learning was both efficient and effective. Such inclusion, however, has

implications for the selection of inquirers. The competitive process of proposal submissions precludes participation in such opening conversations. The notion of competition in itself is incongruent with the aims of an interpretive practice. Would there be a place or places for our continuing explorations? And if so, what kind of places?

Birdwood was an experience of everything in the moment. I now understood something about the embeddedness of lived experience, I had experienced relationship with two other women in a way that honoured our differences and I had glimpsed an underlying process which could provide a different way of thinking and acting within inquiries. When we packed up and left Birdwood for the last time, I had very mixed feelings. In some ways, I left feeling exhilarated, as if I had jumped onto a plane with all the anticipation of leaving on vacation. Yet, I was also aware that I was moving again into uncharted territory and another period of struggle would begin as I incorporated my learning into action.

## **EPILOGUE - LIVING WITH ACTION**

**I left Birdwood energized to continue my learning journey. I had already been privileged to participate with other women in studying ourselves in action. It was kind of amazing, too, to be examining the very work we were doing in the moment of our experience of it. It was messy, complicated, time-consuming and painful for me as I pushed open my boundaries in what felt at times like a hostile world. Nevertheless, we had persevered and a new opening was underway. I had certain ideas I wanted to begin experiencing immediately: the introduction of intentional reflection into conversations; writing in the moment that would capture movement and barriers to movement; intentional awareness of myself - to listen, to support experience; to trust myself and others that through our process together learning would emerge (I did not have to make anything happen); to work with the process structures we had identified; to create settings for learning and to deepen the conversation with my colleagues. Of course, I also had the task of writing up the 'report' of my and our experience.**

**We did begin to incorporate reflection into our practice. In one project in which only I was involved, reflection became an intentional aspect of every conversation for the past year. In this particular setting, it has been a very helpful dimension for naming learning, for strengthening relationships and for taking action. In other situations, the introduction of reflection was a disrupting experience. Sometimes the disruption created**

**the opening for learning, at other times, the disruption raised barriers. We are continuing to explore when and how to use reflection.**

**We continue to experiment with writing. We raise the issue of writing at the outset of projects in our continuing effort to write only that which is relevant to creating and sustaining learning and change.**

**I am learning more about working in the moment conscious of and attentive to the elements in the process that were illuminated in this dissertation.**

**For myself, in the year since Birdwood, through writing the dissertation and through the many inquiries in which I have been involved, I have come to another level of realization about the work I am doing.**

**I have always interpreted action as 'doing' some kind of activity, a demonstration of practical knowledge (Reason, 1994, p. 326). Dare I mention data gathering as one example! Action, for me, has been the kind of response I give to the abstracted 'bits' from the flow to which Bohm (1980) refers and I discussed on page 39. Attention to these abstracted concepts is what receives credence in inquiries, for example, designing inquiries, interviewing, interpreting, writing reports. I now think, however, that action is more about the movement that occurs under the dialogues, that is, the movement of relationships. This movement has often been talked about as 'process' which is seen as time-consuming, as 'soft', as non-productive, as dismissable. Sometimes, this 'process' is viewed as feminine. Yet, this is the very action that results in change. It**

becomes necessary to name these processes as action, to pay attention to them with all the dedication we give to other activities named as action. In this way we can re-frame outcomes to be the outcomes that emerge from every conversation, the "outcomes along the way" (Clandinin, personal communication, October, 1996). These are the outcomes that add up to the kind of learning and action that creates transformative change.

I began to more fully comprehend the lived meaning of an interpretive worldview. By the end of Birdwood, even though I intellectually understood the concept of living in a social world continuously being constructed and re-constructed, I still had not integrated the idea that each moment is complete in itself and, therefore, is an ideal already achieved. Previously, I had started with the notion of the lifeworld, capturing its unfolding meaning, satisfied and pleased by what emerged from the confluences. And then I would sit in judgement of myself. I had failed to analyze correctly. I had failed to be in tune with my colleagues. I worried about what you, the reader, would think.

Suddenly, what was intended as meaning in the moment became an ideal 'out there' to be obtained. For example, I had anticipated that my colleagues and I would co-author the document recording the memory of the Thesis Inquiry Project. The document would somehow embody the collaborative experience and reflect a collaborative interpretation of the meaning of our experience. When this did not and could not happen, I judged myself a failure because I saw that I had become a principal researcher distanced from my colleagues. The very kind of practice that I



**had found to impede implementation! For me to accept an interpretation of failure would mean that I was still at a place of evaluating my progress against a pre-determined standard. I have come to understand that it is not necessary to measure myself or others against another's idea or against an ideal. Appreciating that every moment is complete in itself, we are living the best that the moment can be at this time, that is, an ideal. I have come to recognize that it is not about what is ultimately 'out there' but rather, that we are together in a mutual struggle "to become oriented in an enigmatic world. . . the effort of mutually connected essences to discover the meaning of their existence" (Strasser, 1963, p. 269).**

**I can also say that after a year of exploration, of trial and struggle - working with process works. I can say that our creation of a learning circle approach is a way of generating meaning and implementing collective change within the workplace. I can say that our way of writing reports as works in progress has been accepted. I can say that we have found that we are able to use that one chance at a collected interpretation, to achieve learning and move it into action. All of this, however, is the next story.**

**Within the evaluation field, my colleagues and I are a community of learners, struggling to find ever more effective ways to improve our practice in the service of others. While I have gazed upon my own practice and that of my colleagues, it is only the foreground of a multi-coloured backdrop replete with the ideas and words of other practitioners who have something to teach us: words such as participation;**

**collaboration; action; feminisms; narrative; empowerment and phenomenology. I hope that our experience adds another colour to the inquiry mosaic.**

## References

- Argyris, C., & Schon, D. (1974). Theory in practice: Increasing professional effectiveness. San Francisco: Jossey-Bass.
- Barone, T., & Eisner, E. (1995). Arts-based educational research. Unpublished manuscript.
- Barritt, L. (1985). Researching educational practice. Grand Forks, ND: University of North Dakota.
- Belenky, M. F., Clinchy, B. M., Goldberger, N. R., Tarule, J. M. (1986). Women's ways of knowing: The development of self, voice, and mind. United States of America. Basic Books.
- Benner, P. (1994). The tradition and skill of interpretive phenomenology in studying health, illness and caring practices. In P. Benner (Ed.), Interpretive phenomenology: Embodiment, caring, and ethics in health and illness (pp. 99-127). Thousand Oaks: Sage.
- Bergum, V. (1994). Knowledge for ethical care. Nursing Ethics. 1(2), 71-79.
- Berton, P. (1965). The comfortable pew: A critical look at Christianity and the religious establishment in the new age. Toronto: McClelland & Stewart.
- Binney, G., & Williams, C. (1995). Leaning into the future: Changing the way people change organizations. London: Nicholas Brealey.

- Block, P. (1993). Stewardship: Choosing service over self-interest. San Francisco: Berrett-Koehler.
- Blumer, H. (1969). Symbolic interactionism: Perspective and method. Englewood Cliffs: Prentice Hall.
- Bogdan, R., & Biklen, S. K. (1982). Qualitative research for education: An introduction to theory and methods. Boston: Allyn and Bacon.
- Bohm, D. (1980). Wholeness and the implicate order. London: ARK Paperbacks.
- Boud, D., & Walker, D. (1991). Experience and learning: Reflection at work. Victoria, Australia: Deakin University.
- Brown, J. (1995). Dialogue: Capacities and stories. In S. Chawla & J. Renesch (Eds.), Learning organizations: developing cultures for tomorrow's workplace (pp. 153-164). Portland: Productivity Press.
- Bruner, C. (1991). Thinking collaboratively: Ten questions and answers to help policy makers improve children's services. Washington, DC: Education and Human Services Consortium.
- Bubner, R. (1981). Hermeneutics: understanding or edification? In J. N. Mohanty (Ed.), Phenomenology and the human sciences. Vol. 12. Denver: University of Oklahoma Printing Services.
- Carr, D. (1991). Time, narrative, and history. Bloomington: University Press.

- Carse, J. P. (1995). Breakfast at the victory: The mysticism of ordinary experience. San Fransisco: Harper Collins.
- Cennamo, K. S. (1995). A "layers of negotiation" model for designing constructivist learning materials. In Proceedings of the 1995 Annual National Convention of the Association for Educational Communications and Technology (17th). Anaheim, Ca.
- Connelly, M., & Clandinin, D. J. (1990). Stories of experience and narrative inquiry. Educational Researcher, 19(4), 2-14.
- Clandinin, D. J., & Connelly, M. (1995). Teachers' professional knowledge landscape. New York: New York Teachers College Press.
- Cousins, J. B., & Earl, L. M. (1995). The case for participatory evaluation: Theory, research and practice. In J. B. Cousins & L. M. Earl (Eds.), Participatory Evaluation in Education (pp. 3-18). London: Falmer Press.
- Denzin, N. K. (1994). The art and politics of interpretation. In N. K. Denzin, & Y. S. Lincoln (Eds.), Handbook of Qualitative Research (pp. 500-515). Thousand Oaks: Sage.
- Donmoyer, R. (1991). Postpositivist evaluation: Give me a for instance. Education Administration Quarterly, 27(3), 265-296.
- Elmore, R. F. (1978). Organizational models of social program implementation. Public Policy, 26(2).
- Ely, M., Anzul, M., Friedman, T., Garner, D., & Steinmetz, A. (1991). Doing qualitative research: Circles within circles. London: The Falmer Press.

- Erlandson, D. A., Harris, E. L., Skipper, B. L., & Allen, S. D. (1993). Doing naturalistic inquiry: A guide to methods. Newbury Park: Sage.
- Estes, C. P. (1992). Women who run with the wolves. New York: Ballantine Books.
- Fawcett, B., Paine-Andrews, A., Francisco, V., Schultz, J., Richter, K., Lewis, R., Harris, K., Williams, E., Berkley, J., Lopez, C., & Fisher, L. (1996). Empowering community health initiatives through evaluation. In D. Fetterman, S. Kaftarian, & A. Wandersman. (Eds.), Empowerment evaluation: Knowledge and tools for self-assessment & accountability (pp. 161-187). Thousand Oaks: Sage.
- Ferguson, M. (1980). The Aquarian Conspiracy. Los Angeles: J. P. Tarcher Inc.
- Fetterman, D. M. (1996). Empowerment Evaluation: An Introduction to Theory and Practice. In D. M. Fetterman, S. J. Kaftarian, & A. Wandersman (Eds.), Empowerment evaluation: knowledge and tools for self-assessment & accountability. (1st ed.). Thousand Oaks: Sage.
- Fetterman, D. M. (1988). Qualitative approaches to evaluating education. Educational Researcher, 17(8), 17-23.
- Fonow, M. M., & Cook, J. A. (1991). Back to the future: A look at the second wave of feminist epistemology and methodology. In M. M. Fonow & J. A. Cook (Eds.), Beyond methodology: feminist scholarship as lived research (pp. 1-15). Bloomington: Indiana University Press.

- Fontana, A., & Frey, J. (1994). Interviewing: The art of science. In N. K. Denzin & Y. S. Lincoln (Eds.), Handbook of qualitative research (pp. 361-376). Thousand Oaks: Sage.
- Gadamer, H. G. (1989). Truth and method. New York: Crossroad.
- Gendreau, L., & Workman, L. (1995). Awakening the spirit: A process of change. Edmonton: The Elizabeth Fry Society of Edmonton.
- Gilligan, C. (1982). In a different voice: Psychological theory and women's development. Cambridge: Harvard University Press.
- Glesne, C., & Peshkin, A. (1992). Becoming qualitative researchers: An introduction. White Plains, New York: Longman.
- Gordon, J. R. (1991). A diagnostic approach to organizational behavior. Toronto: Allyn and Bacon.
- Greene, J. C. (1994). Qualitative program evaluation: practice and promise. In N. K. Denzin, & Y. S. Lincoln (Eds.). Handbook of qualitative research (pp. 530-544). Thousand Oaks: Sage.
- Guba, E. G. (1978). Toward a methodology of naturalistic inquiry in educational evaluation. In E. L. Baker (Ed.), CSE Monograph Series in Evaluation. Los Angeles: UCLA Graduate School of Education.
- Guba, E. G. (1981). Criteria for assessing the trustworthiness in naturalistic inquiries. Educational Communication and Technology, 29(2), 75-91.
- Guba, E. G., & Lincoln, Y. S. (1981). Effective evaluation. San Francisco: Jossey-Bass.

- Guba, E. G., & Lincoln, Y. S. (1989). Fourth generation evaluation. Newbury Park: Sage.
- Guba, E. G. (1990). The paradigm dialogue. Newbury Park: Sage.
- Hammond, M., Howarth, J., & Keat, R. (1991). Understanding Phenomenology. Oxford: Basil Blackwell.
- Heider, J. (1985). The Tao of Leadership. New York: Bantam Books.
- Holstein, J. A., & Gubrium, J. F. (1994). Phenomenology, ethnomethodology, and interpretive Practice. In N. K. Denzin, & Y. S. Lincoln (Eds.), Handbook of qualitative research (pp. 262-272). Thousand Oaks: Sage.
- Howell, D. (1996, September 26). Gov't ignores anti-poverty report. The Edmonton Journal, p. 7.
- Husband, R., & Foster, W. (1987). Understanding qualitative research: a strategic approach to qualitative methodology. Journal of Humanistic Education and Development, 26(2), 50-63.
- Hutchinson, S., & Wilson, H. (1994). Research and therapeutic interviews: a poststructuralist perspective. In J. M. Morse (Ed.), Critical issues in qualitative research methods (pp. 301-322). Thousand Oaks: Sage.
- Jordan, J. V. (1986). The meaning of mutuality. Work in Progress, 23, 1-17. Wellesley: Stone Center for Developmental Services and Studies.
- Kanter, R. M. (1983). The change masters. New York: Simon & Schuster.



- Kernaghan, K. (1991). Empowerment and public administration: revolutionary advance or passing fancy? Canadian Public Administration, 35(2), 194-214.
- King, J. A. (1995). Involving practitioners in evaluation studies: How viable is collaborative evaluation in schools? In J. B. Cousins & L. M. Earl (Eds.), Participatory evaluation in education: studies in evaluation use and organizational learning (pp. 86-102). London: Falmer Press.
- Kleinman, S., & Copp, M. A. (1993). Emotions and fieldwork. Qualitative Research Methods, 28, 1-62.
- Krentz, C., Kapuscinski, P., Browne, N., Cooper, E., & Goulet, L. (1993). Collaborating within a faculty: research and program development. In D. J. Clandinin (Ed.), Searching for connections: Struggling for community (pp. 5-13). Edmonton: Among Teachers Community Centre for Research for Teacher Education and Development.
- Kvale, S. (1983). The qualitative research interview: A phenomenological and a hermeneutical mode of understanding. Journal of Phenomenological Psychology, 14, 171-196.
- LaRocque, L., Boivin, R., & Downie, R. (1993). Doing collaborative research: The challenges and the rewards. Paper presented at the annual meeting of the Canadian Society for the Study of Education.
- Leonard, V. W. (1994). A Heideggerian phenomenological perspective on the concept of person. In P. Benner (Ed.), Interpretive

phenomenology: Embodiment, caring, ethics in health and illness, Thousand Oaks: Sage.

Levin, H. M. (1996). Empowerment evaluation and accelerated schools. In D. M. Fetterman, S. J. Kaftarian, & A. Wandersman (Eds.), Empowerment evaluation: Knowledge and tools for self-assessment & accountability (pp. 49-64). Thousand Oaks: Sage.

Lincoln, Y. S., & Guba, E. (1985). Naturalistic inquiry. Beverly Hills: Sage.

Lincoln, Y. S. (1986, February). Negotiating politics in organizational cultures: Some considerations for effective program evaluation. Paper presented at the annual meeting of the Association for the Study of Higher Education, San Antonio, Texas.

Lincoln, Y. S. (1990). The making of a constructivist: A remembrance of transformations past. In E. Guba (Ed.), The paradigm dialog (pp. 67-87). Newbury Park: Sage.

Lincoln, Y. S. (1992). Sympathetic connections between qualitative methods and health research. Qualitative Health Research, 2(4), 375-391.

Lincoln, Y. S., & Denzin, N. K. (1994). The fifth moment. In N. K. Denzin, & Y. S. Lincoln (Eds.), Handbook of qualitative research (pp. 575-586). Thousand Oaks: Sage.

Mezirow, J., & Associates (1990). Fostering critical reflection in adulthood. San Francisco: Jossey-Bass.

Mezirow, J. (1991). Transformative dimensions of adult learning. San Francisco: Jossey-Bass.

- Miller, J. B. (1976). Toward a new psychology of women. Boston: Beacon Press.
- Mithaug, D. E. (1996). Fairness, liberty, and empowerment evaluation. In D. M. Fetterman, S. J. Kaftarian, & A. Wandersman (Eds.), Empowerment evaluation: Knowledge and tools for self-assessment & accountability (pp. 234-255). Thousand Oaks: Sage.
- Mitroff, I. I. (1983). Stakeholders of the organizational mind. San Francisco: Jossey-Bass.
- Morgan, G. (1984). Opportunities arising from paradigm diversity. Administration and Society, 16(3), 306-327.
- Morgan, G. (1986). Images of organization. Newbury Park: Sage.
- Moustakas, C. (1990). Heuristic research. Beverly Hills: Sage.
- Moustakas, C. (1994). Phenomenological research methods. Thousand Oaks: Sage.
- Munhall, P. L., & Boyd, C. O. (1993). Nursing research: A qualitative perspective (2nd ed.). New York: National League for Nursing Press.
- Niebuhr, R. H. (1963). The responsible self. New York: Harper & Row.
- O'Brecht, M. (1991). Heuristic research [Review of heuristic research]. The Canadian Journal of Program Evaluation, 6(2), 129-131.

- Patton, M. Q. (1978). Utilization-focused evaluation. Beverly Hills: Sage.
- Patton, M. Q. (1984, February). Sneetches, zax and empty pants: Alternative approaches to evaluation. Paper presented at the meeting of the California Postsecondary Conference on Evaluation.
- Patton, M. Q. (1990). Qualitative evaluation and research methods. Newbury Park: Sage.
- Petroff, E. (1986). Medieval women's visionary literature. New York: Oxford University Press.
- Quality of Life Commission. (1996). Listen to me. Edmonton: Edmonton Social Planning Council.
- Reason, P. (1994). Three approaches to participative inquiry. In N. K. Denzin, & Y. S. Lincoln (Eds.), Handbook of qualitative research (pp. 324-339). Thousand Oaks: Sage.
- Reinharz, S. (1992). Feminist Methods in Social Research. New York: Oxford University Press.
- Roberts, B. (1984). The Experience of No Self. Boston: Shambala.
- Roberts, B. (1985). The Path to No Self. Boston: Shambala.
- Rosenau, P. M. (1992). Post-modernism and the social sciences. Princeton: Princeton University Press.
- Ryan, S. (1995). Learning communities: An alternative to the "expert" model. In S. Chawla, & J. Renesch (Eds.), Learning

- organizations: Developing cultures for tomorrow's workplace (pp. 279-291). Portland: Productivity Press.
- Schon, Donald A. (1983). The reflective practitioner: How professionals think in action. New York: Basic Books.
- Senge, P. (1990). The fifth discipline: The art & practice of the learning organization. Framingham: Innovation Associates.
- Senge, P. (1990). The leader's new work: Building learning organizations. Sloan Management Review, 32(1), 1-23.
- Smith, D. (1994). Pedagon: Meditations of pedagogy and culture. Bragg Creek, Alberta: Mayko Press.
- Smith, J. K. (1989). The nature of social and educational inquiry: Empiricism versus interpretation. Norwood: Ablex.
- Smith, J. K. (1990). Alternative research paradigms and the problem of criteria. In E. Guba (Ed.), The Paradigm Dialogue (pp. 167-187). Newbury Park: Sage.
- Smith, N. L., & St. John, M. (1985). Overview of alternative evaluation methods ( report No. 107, interim draft). Washington DC: National Institute of Education.
- Spiegelberg, H. (1970). On some human uses of phenomenology. In F. J. Smith Phenomenology in Perspective 16-31. The Hague: Martinus Nijhoff.
- Stake, R. (1967). The Countenance of Educational Evaluation. Teachers College Record, 68, 523-540.

- Strasser, S. (1963). Phenomenology and the human sciences. Pittsburgh: Duquesne University Press.
- Sykes, B., & Wolfe, R. (1995). Caring together: A demonstration project. Edmonton: AIDS Network of Edmonton.
- Van Manen, M. (1990). Researching lived experience: Human science for an action sensitive pedagogy. Ann Arbor: The Althouse Press.
- Van Manen, M. (1984). Action research as a theory of the unique: From pedagogic thoughtfulness to pedagogic tactfulness. Curriculum Praxis (occasional paper No. 32).
- Walton, R. E. (1985). Toward a strategy of eliciting employee commitment based on policies of mutuality. In R. E. Walton & P. R. Lawrence (Eds.), Human resource management trends and challenges (pp. 35-65). Boston: Harvard Business School Press.
- Wasser, J., & Bresler, L. (1996). Working in the interpretive zone: Conceptualizing collaboration in research teams. Educational Researcher, 25(5), 5-15.
- Winter, R. (1989). Learning from experience: Principles and practice in action-research. London: The Falmer Press.
- Wolfe, R., & Gendreau, L. (1996) Streetworks evaluation. Unpublished report. Edmonton.
- Woolfolk, R. L. (1992). Hermeneutics, social constructionism and other items of intellectual fashion: Intimations for clinical science. Behaviour Therapy, 23, 213-223.

Workman, L. (1992). The experience of policy. Phenomenology & Pedagogy, 10, 215-223.

Workman, L. (1979). Quality assurance in medical social work. Unpublished master's thesis, University of Calgary, Calgary, AB.

Young, B. (1989). Not finished yet: The stories of four women's careers in education. Unpublished doctoral dissertation, University of Alberta, Edmonton. AB.

Young Beth. (1992). On careers: Themes from the lives of four western Canadian women educators. Canadian Journal of Education, 17(2), 148-161.