GROWING TOGETHER: THE EVOLUTION OF CONSCIOUSNESS USING

COLLABORATIVE DEVELOPMENTAL ACTION INQUIRY

by

LAKEESHA RENEE SMITH

(Under the Direction of Aliki Nicolaides)

ABSTRACT

Adulthood can be described as a time of negotiating a range of demands and complex roles and life tasks that cross multiple, overlapping domains of experience for which there are no definitive guidelines or training. These demands are compounded by the complex, ever-changing environments and circumstances of the 21st century. Adults are frequently required to develop expanded capacities that require not only new skills and behavior, but also new ways of knowing; however, many adults struggle with this. As a result, adult development and learning are key concerns in a variety of disciplines and for adults themselves.

The purpose of this action research case study was to explore the experience and facilitation of the evolution of consciousness in adults using the methodology of collaborative developmental action inquiry (CDAI). I convened and served as the primary researcher and facilitator for a group of seven women (myself included) who met virtually for 12 months to explore our own evolution of consciousness. We collected data at the first-, second-, and third-person levels, including pre- and post-group interviews, group meeting audio recordings, member post-meeting reflections, member

journal entries, and my own researcher memos. We also measured our current stage of development using the validated Global Leadership Profile. Data were collected and analyzed using a post-qualitative research approach that was eclectic, emergent, and congruent with the CDAI method. From these data, key learnings and insights emerged suggesting that intentional community is necessary for development; vertical development should not be privileged over horizontal development; and individuals have different "center of gravity" action logics from which they act, and sometimes make meaning, in different situations and contexts, as an involuntary default. Furthermore, CDAI serves as a useful liberating method for evolution of consciousness; and intentional facilitation and friendship are crucial for enacting CDAI in communities of inquiry and practice.

This inquiry serves as a useful illustration of CDAI in a non-organizational context and offers important suggestions for the development and facilitation of intentional communities of inquiry and practice seeking to support adult development. The inquiry also contributes to the literature around constructive-developmental theory and action research.

INDEX WORDS: Action research, Collaborative developmental action inquiry, Action inquiry, Collaborative inquiry, Case study, Constructive-developmental theory, Consciousness, Evolution, Post-qualitative research, Women

GROWING TOGETHER: THE EVOLUTION OF CONSCIOUSNESS USING

COLLABORATIVE DEVELOPMENTAL ACTION INQUIRY

by

LAKEESHA RENEE SMITH

B.A., Swarthmore College, 1996

M.P.H., Emory University, 2004

A Dissertation Submitted to the Graduate Faculty of The University of Georgia in Partial

Fulfillment of the Requirements for the Degree

DOCTOR OF EDUCATION

ATHENS, GEORGIA

2016

GROWING TOGETHER: THE EVOLUTION OF CONSCIOUSNESS USING

COLLABORATIVE DEVELOPMENTAL ACTION INQUIRY

by

LAKEESHA RENEE SMITH

Major Professor:	Aliki Nicolaides	
Committee:	Wendy Ruona	
	Karen Watkins	

Electronic Version Approved:

Suzanne Barbour
Dean of the Graduate School
The University of Georgia
May 2016

DEDICATION

To Kim, my soulmate, witness, and constant companion on the path

To Aliki, the lighthouse who held steady and led the way

To the beautiful ones who are not yet born, including my past, present, and future

selves—always in a state of becoming, always questing toward wholeness

ACKNOWLEDGEMENTS

No doctoral journey is ever taken alone, and this has been especially true for mine. There are my cohort members, who influenced and supported me collectively and in their own individual ways. There are my committee members, Drs. Ruona, Watkins, and Nicolaides, who supported and challenged me in my coursework and throughout the development of my research—to the very end. While there has been a cast of characters from both personal and professional spaces who have walked different legs of this path with me or who have been supportive in helping me navigate and learn through this experience, there are a few individuals who have been particularly instrumental.

First, I would like to mention and thank the six brave women—my co-inquirers— who participated in the evolution of consciousness group that I convened as part of my research. Indeed, my initial fear was that no one would share my interest or concern or be crazy enough to take such a journey with me. It was particularly special to engage in this work with dear friends, with whom I could share such an intimate and intense exploration. We will have that experience and memory for a lifetime, and it will no doubt support our continued "living inquiry" together. I am also deeply grateful to and for the women whom I did not know initially but came to know and appreciate over the course of our inquiry. You all challenged me, supported me, and reflected different parts of me. You brought as much of yourselves as possible to our endeavor. In so doing, you provided me with the opportunity to realize a previously unexpressed dream for intentional community, as well as an opportunity for my own growth and evolution. I

was and am deeply moved and humbled by your allowing me to see you and witness your lives—and all of the hopes, dramas, fears, and joys embedded within. The sacredness of this gift was never lost on me. I wish you all much light and love on your continued quests for wholeness.

Next, I would like to offer an incomplete but heartfelt acknowledgement of my brave, brilliant, bold, caring, and generous mentor and advisor, Aliki Nicolaides. You, who embody the energy of Ganesh and Kali, cut through confusion and illuminate shadow with fierce love. You were the right teacher and friend at the right time to hold this space of deep transformation that I was to embark upon during this journey. I am deeply thankful for your being, seeing, and knowing. Your fullness and generosity in giving of yourself has been like manna. Thank you for connecting me to the rich scholarly and inquiry traditions that helped illuminate me to myself and connect the disparate threads of my being and knowing.

Likewise, I would be remiss without naming Bill Torbert, whose beautiful and complex theory and approach have been integral not only to my dissertation work, but also to my living inquiry at this point in my life. As my understanding of the depth of action inquiry continues to evolve, so too does my gratitude for your life's work and contribution. I am honored to pick up and carry that torch. I am further honored to have discovered a connection and friendship with you that is nourishing, generative, and developmental. Thank you for your presence, care, and generosity.

I would also like to offer my deepest appreciation and gratitude for my inner circle of beloveds—new and old—who held me in different ways through this process. To my friend and fellow dissertation writing group member Allie, I felt our connection

from the first time I met you. Since then, I have enjoyed learning and growing with you. Not only have you opened up your home to me, but you have shared your beautiful mind and astute insights—sharpening my understanding of developmental theory and my work. Thank you for your friendship, clear seeing, and holding over these years.

To my dearest Bev, it has been a joy and pleasure to "head north" with you over these past few years. After that first brunch at Sun in my Belly, we have never looked back. You have been my loyal pace partner—the steady presence with whom I could mark time and who helped me to keep heart. The coffee shop reflexivity interviews, stomach-hurting laughs, delightful afternoons in the sanctuary, writing retreats, international travels, and companionship through tearful moments have made all the difference and has forever connected us. You are the rock and the salt of the earth—unwavering and unquestioned—for all who are privileged to be in your collection and cared for by you.

To Byrd, you have been the loyal and protective brother and friend/rolling buddy I desperately needed through this experience. You made it your mission to pull me out of my introversion and out of the house when I was in danger of falling into isolation and despair. Yours was an easy friendship and connection in which I could be my full self—a precious gift in all the complexities of my life over these past few years. I will cherish forever our Sunday night *True Blood* watching ritual, with me curled up with Stephanie on your couch. Indeed, I thank the two of you for adopting me as family and for always welcoming me into your home. Also, etched in my memory are our coffee shop writing and laugh sessions, brunches at Sundial, companion grocery shopping, and your famous live-DJ'd parties.

Stanford, who would have known that you would have entered my life again after more than 15 years during this particular time? I have often wondered at the significance of this, but it was almost as if we simply picked up mid-sentence a conversation that began in another time and place, when we were different people. The intensity of your presence in my life during this time—and since the beginning really—is ineffable but profound. Our relationship has been a joy and a challenge that has added color and juiciness to the singularity and grayness of my life. Your presence has helped to illuminate my light and shadow, unearthing a tender and primal longing that I struggled to name. In many ways, the presence and loving of you—as much a part of my living inquiry as my research—provided the backwind for my growth during this process. Thank you for being—you are one of the beautiful ones. Thank you for your love and sweet presence. Thank you for your seeing and witnessing of me and this journey. It has been more significant than you know.

I also would like to mention my mother, who joined this journey in a particular, noteworthy way. Toward the end, mom, you joined me in my little green house in the midst of your own journey. You have been a direct and up-close witness to the ruins and the final emergence into the light. I know that it has been stunning to watch, but you have endeavored to hold steady and support me even when there was no comfort to be had. Thank you.

Last but not least, to my beloved Kim, what can I say? You are everything. I don't know who I would be without you. We have been engaged in our living inquiry together for the entirety of our adult lives. Beyond your steady and abiding presence in and witness to my life overall, you have been an integral part of this experience, both as a

witness and supporter, and, surprisingly, a participant. No catalogue of the ways that you show up for and hold me will be sufficient. Suffice it to say that I would not have gotten through this without you. Indeed, I am because you are.

Finally, I offer a special thanks to Lovie, the neurotic but thoroughly endearing brown and barking companion with whom I share my space. Not only has she endured less attention and walks these past few years, but she has been a faithful sidekick during the long days and nights of writing the dissertation. Specifically, during the past couple of months, she had taken to sitting up with me, lying quietly curled in a ball next to the dining room table where I wrote. Each night, she would rest by my side until I retired for the evening after my long writing sessions. This was a notable difference from her earlier harassment and whining for my attention at the start of my doctoral studies. Her silent and steady vigil during those solitary and often difficult nights was appreciated.

Thank you all for being the wind beneath my wings.

TABLE OF CONTENTS

Page

LIST OF TABLES

LIST OF FIGURES

CHAPTER 1

INTRODUCTION

The spirit is never at rest, but always engaged in ever progressive motion,
in giving itself a new form.
<div align="right">—Hegel, 1910</div>

The idea for this inquiry was born from an epiphany—literally. It all started at

my dining room table on a relaxed Saturday afternoon in November 2012, in the middle

of a four-hour U-journaling exercise (Scharmer, 2009) for a class assignment. I was

responding to a prompt about what new possibilities I saw emerging in my life, and, as if

out of thin air, the idea came to me. Specifically, I was writing about my own personal

transformation process and how that particular time in my life felt full of new learning

and insights, full of challenges unsolved and questions unanswered, and pregnant with

possibility. It felt evolutionary in fact. Indeed, for the past couple of years prior, I had

been keenly aware of a burgeoning shift in my way of seeing and knowing myself,

others, and the world around me that had created some dissonance with how I had

typically understood things and how I was behaving in the world. This shift had, for

instance, caused me to question my career choices and begin pursuing others, and had

changed the way I viewed and acted in my relationships with close others. As I

considered the new possibilities of this shift during the U-journaling process, I felt an

aliveness and energy. Yet, the change I was perceiving had been difficult and painful at

times. There were plenty of missteps, angst, and battle scars. Consequently, I tried

different strategies, including my usual ones—therapy, meditation, yoga—to manage,

and they were more or less successful. Sometimes I felt stuck and frustrated, and

unsuccessful in navigating the shift along with the usual demands of my life. However,

in that moment, I was not feeling frustrated; I felt energized and hopeful. I also noted

that, ironically, a few key people in my close friendship circle were also in the midst of

what seemed like their own personal transformations or evolutions and were struggling to

get to the other side of them. I thought, "Wouldn't it be interesting if I did a study on

that—our individual change processes?" It immediately felt like the right type of inquiry

in which to engage—deeply personal, relevant, and timely. Almost immediately,

however, I found ways to begin talking myself out of it, even though I knew that this

inquiry was where I needed to go. Ultimately, that small but powerful seed germinated

into the study described in these pages. In actuality, the seed had been planted many

years earlier, before I could even fully understand it.

The evolution of consciousness as a topic of inquiry feels almost like searching

for the Holy Grail. As Hegel's quote in the chapter epigraph suggests, inquiry into this

topic is ageless and seemingly hardwired into humans' explorations of their own

condition. In that sense, there may have been nothing unique about either my

predicament or my desire to interrogate it. I may have simply been joining a long line of

ordinary humans who have pondered this topic. However, my entire life, it seems, had

been leading me to this study. For as long as I can remember, I have been in "ever

progressive motion" toward growth and change—and I have been acutely aware of this

fact. I have also taken on growth and change as a primary purpose in all of my life's

endeavors. Furthermore, since I was a child, I have approached my life as a "living

inquiry" (Marshall, 1999; Torbert, 1991), innately curious and always tinkering and

exploring at the boundaries of my knowing and experience. This was the first time, however, that I had explored the topic of growth and change more formally as a scholarly, academic endeavor.

Epiphanies are electric. They are creative and generative. They often point those who experience them in a direction. Typically, however, they do not provide the form and focus necessary for their manifestation; that usually comes later in iterations, in fits and starts, and through dialogue and consultation with close, relevant, and better informed others. The most recent and fixed iteration that I settled upon was a collaborative inquiry into the experiences and facilitation of the evolution of consciousness in adults toward greater personal and social awareness and effectiveness.

What follows in these pages is the form and content of this iteration of my inquiry as I currently understand it in its most recent manifestation. In keeping with the idea of a living inquiry, one that is deeply personal and subjective, this introductory chapter offers a broad and deep presentation of the concern that spurred this inquiry and that is firmly grounded in the perspectives of my co-inquirers and me.

Problem Framing and Concern

In Over Our Heads: The Forest

Adulthood can be described as a time of negotiating a range of demands and complex roles and life tasks that cross multiple, overlapping domains of experience (e.g., professional, familial, etc.) for which there are no definitive guidelines or training. Additionally, adults are often faced with regularly changing and unfolding challenges and expectations that not only require different actions than what they currently have competence and practice in but also involve generating new awareness, meaning,

learning, and developing in relationship to their environment. These typical demands of adulthood are now coupled with a new norm of ever-growing complexity, instability, and ambiguity in which adults find themselves in the 21st century. Indeed, these realities have become taken-for-granted and much-discussed assumptions in the fields of adult learning and organizational studies, in which practitioners and scholars have focused their attentions on helping adults and organizations navigate this new landscape (Dzubinski, Hentz, Davis, & Nicolaides, 2012; Merriam, Caffarella, & Baumgartner, 2007; Nicolaides & Yorks, 2008; Scharmer, 2009). Specifically, Nicolaides and Yorks (2008) write extensively about the need to help adults learn both competencies and greater capacities to manage and take action within the complexities of modern-day life. They summarized this modern state of affairs by saying:

> A paradox of our contemporary organizations and society is that we are accumulating new knowledge at an ever increasing rate, while at the same time we are confronted with the potential disasters of the unanticipated, nonlinear consequences of this accumulating body of knowledge. Even as our knowledge base in terms of seeing learning as a noun is becoming more and more rich, our sense of control over our world is becoming less. It is as if we are becoming less knowing even as we become more knowledgeable. Addressing this paradox … requires that we look at the process of learning, and take seriously the implications of understanding learning as a verb. (p. 50)

This statement points to the idea that success in adulthood requires an ongoing process of learning and adaptation. The authors also discuss the form that learning must take in order for adults to be successful in the modern-day landscape of complexity. They

emphasize the importance of an active learning from experience that is dynamic, present-focused, and attuned to one's environment (Nicolaides & Yorks, 2008). Kegan and colleagues (2001) further highlight the necessity and challenge of dynamic growth and adaptation in adulthood:

> We link adult growth and development to the lifelong process of constructing increasingly complex systems of meaning making—or ways of knowing—in order to better understand ourselves and our social roles in an increasingly complex world. Adults gradually evolve from a simpler way of knowing or underlying meaning system to another more complex way of knowing at their own pace depending on the available supports, scaffolding, appropriate developmental challenges, and encouragement for growth. We see development as an interactive process between the person and the environment, which transpires within a social-cultural context. In the United States, the social role and task demands on adults frequently outpace an individual's developmental capacities (Kegan, 1994). Moreover, there may or may not be the necessary supports to develop more complex capacities. (p. 7)

In addition to the necessity for adaptive and transformative learning in adulthood, it is often assumed that adults have the capacity and ability to navigate the requirements of adulthood or at least learn their way through them (Nicolaides, 2015; Nicolaides & Yorks, 2008; Yorks & Nicolaides, 2013). In actuality—and as Kegan (1994), a key theorist in adult development theory, describes in the earlier quote—many adults do not have this capacity and often find themselves struggling to manage these shifting demands and to adapt and grow into new ways of knowing, being, and acting. Kegan (1994)

highlights the unfortunate mismatch between adults' complexity of knowing and being (or order of consciousness) and what he calls the curriculum of modern-day adulthood and its demands on its students (e.g., 21st-century parenting, partnering, working, etc.). He explains that these curricular demands are not so much around one's intelligence or the content of what one knows, but rather how one knows or makes meaning of one's experience, relationships, and self (Kegan, 2009). This meaning-making process or capacity deeply influences a person's ability to navigate the curriculum of adulthood. Related to this, he argues that for many the experience of adulthood, and meeting its curricular demands, is one of being "in over one's head"—a concept that is helpful in understanding the practical concern that drove this inquiry. Specifically, being "in over one's head" does not refer simply to the typical difficulty of practically and logistically balancing and managing one's myriad and often conflicting social roles and obligations. Rather, it refers to a problem much deeper than that. The experience of being in over one's head is really about meeting one's epistemological and ontological limits—the edge of one's knowing and being—while simultaneously experiencing life demands that require more capacity. It is about more than merely struggling to effectively juggle and check off items on a long to-do list of activities and commitments in a purely instrumental or single-loop way (i.e., using environmental feedback to make corrections in one's behavior toward different outcomes). What Kegan and I—in the context of this inquiry—are referring to is a fundamental disconnect between how one currently knows and makes meaning of oneself and the surrounding world (or one's epistemological capacity) and how one must know and make meaning of oneself and the surrounding world in order to function effectively (or the epistemological demand). Kegan (1994)

refers to this as a "mismatch between external epistemological demand and internal epistemological capacity" (p. 41). In summary, it is an inability to engage in double-loop learning and shifting (i.e., using environmental feedback to make corrections in one's underlying strategy toward different outcomes) despite one's best efforts and intentions. Put another way, it is an inability to scaffold to the next, required way of understanding and knowing. It is with this gap—this challenge—that this inquiry was concerned.

In Over Our Heads: The Trees

My story. The challenge of being in over one's head is of personal relevance to me as I have often struggled, and continue to struggle, to adapt to and meet the demands of my own life. More than that, I have specifically struggled to make the necessary shifts in epistemological and ontological awareness and perspective to address major life concerns and areas of ineffectiveness and challenge—often finding myself in over my head. What does the experience of being in over one's head look like at the personal level, particularly from the perspective of the women[1] involved in this study? For most of us, it often felt like "being stuck," unable to move forward, and repeating or reliving painful situations and patterns of maladaptive behaviors, oftentimes despite an awareness of their ineffectiveness. Put succinctly, being in over one's head is an experience synonymous with not being able to change. In order to paint a clearer, more grounded picture of the concern that sparked this inquiry, I first describe my own first-person experience of being in over my head before moving on to briefly describe this phenomenon from the collective perspective of my co-inquirers.

---

[1] This inquiry was conducted with a group of six other women who served as co-inquirers, the details and context of which will be described later in the chapter and in Chapter Four.

The experience and awareness of meeting my epistemological and ontological

edge[2] started in my late 20s when I found myself in an unhappy, unhealthy marriage from

which I seemed unable to extract myself. The challenge for me was that I knew I was

unhappy, and I was suffering immensely. I also knew that my husband and I had

irreconcilable differences that were unlikely to improve. I even had some idea about how

I had ended up in the situation. My unhappiness largely stemmed from the fact that my

marriage and my behavior in it felt completely out of alignment with my deepest personal

values about relationships and the type of partnership that I wanted. Yet, I could not act

on this knowledge and feeling—and not because of religious beliefs about divorce or a

lack of resources to support myself practically. I was, in fact, extremely fearful and

ambivalent about leaving. I knew what to do but just could not do it. I could not act on

what I knew and felt. During this time, I sought therapy, I journaled, I read self-help and

spiritually focused literature, attempted to contort myself around the contours of my

relationship, negotiated various solutions—unsuccessfully—with my husband and

regularly processed my emotions with my closest friends. It was all mostly to no avail,

save for a few temporary "break-throughs" or palliatives that never lasted. I could not

find a way out of my suffering. Throughout this process, I sensed that my inability to

"fix" this situation was connected to some deeply held and distorted beliefs and fears

about myself and relationships that were slightly beyond my understanding. Essentially,

I was "stuck." I remained unhappily married and frustrated with myself for five years. I

continued to go to therapy—both individual and couples—and I continued to engage in

all manner of other practices (mentioned earlier) to alleviate my suffering and work on

---

[2] In this context, "edge" refers to a limit or boundary beyond which one cannot easily move.

other concerns that had surfaced. Somewhere in the midst of this, I even joined a Buddhist community and began seriously developing a Buddhist and meditation practice. In some ways, however, all of the "work" I was doing made things even more difficult because I was fully aware of my "stuckness" and my inability to act effectively—or even act at all. Something was missing in my epistemological and ontological perspective, and I knew it. My way and scope of knowing was limited; it was not enough. This was the first time in my life when I felt unable to scaffold my own learning or align my actions with my intentions, regardless of how hard I tried. I eventually did get a divorce, and while this was a huge coup in terms of my own wellness and development, I was still not on the other side of my developmental shift and way of knowing and being.

About two years after my husband and I parted ways, I met and entered into a relationship with another man who was very different from my ex-husband. While the circumstances and dynamics of this new relationship initially appeared distinct, they followed some patterns similar to the dysfunction of my previous relationship. Specifically, once the relationship stopped working, I once again felt unable to extricate myself from the situation despite my most genuine intentions and best efforts. As before, I unsuccessfully tried all of my usual tools to enable me to act on my feelings. I was "stuck" again. This time, however, there was a slight epistemological gap. I began to get glimpses of the patterns of my own behavior and ways of knowing that facilitated these experiences of staying in unhealthy and unhappy relationships. I also began to realize that some of these patterns were similar to my relationships with members of my family of origin, from whom my perspectives and experience were also starting to shift.

At the time when the epiphany of this inquiry first came to me, I had both personal and professional concerns that left me feeling in over my head. Perhaps the best way to summarize my experience was one of struggling to move beyond the limited ways of knowing and being that manifested and/or kept me "stuck" in reenactments of painful and ineffective family and intimate relationship dynamics. Beyond the relationship realm, I was also struggling, both practically and conceptually, to align my livelihood with my deepest values and intentions. For years, I had felt called to do work that was very different than what I was doing. I did not dislike my work, which was in a field I was deeply passionate about; however, it had become increasingly clear over the years that it did not speak to my deepest heart's desire, nor did it reflect my most valued skillsets and abilities. Similar to the relationship realm, it was not in line with how I wanted to be in the world. Intermittently, I struggled with feelings of boredom and dissatisfaction—sometimes more acutely than others. Sometimes, I struggled with completing tasks efficiently because of a subtle malaise and restlessness. In fact, this experience had followed me across different jobs since I had started working. As a result, I spent my early working life changing jobs every couple of years or going back to school to pursue more relevant callings. At the time the inquiry began, I had been in my current position for seven years, and I had mostly found challenge and growth there, as well as flexibility and deep connections with colleagues that enabled me to stay as long as I did. Another reason I stayed was because I did not want to continue to repeat my previous pattern of changing jobs only to eventually experience a similar dissatisfaction since I knew my next change needed to be more substantive and meaningful. Nonetheless, I struggled periodically and wanted a significant change. In order to

supplement my overall lack of fulfillment in my career, I vigorously pursued my emerging passions outside of work. I participated in meditation retreats. I deepened my yoga practice and became a certified yoga instructor. I even began teaching yoga during the weekends, including deeply generative work with incarcerated women and women in recovery from substance abuse. I pursued an interest in energy medicine and became a Reiki (energetic touch healing) practitioner. I also started hiking and camping, along with other hobbies. In essence, I tried to build a rich and satisfying life. Yet, far from quenching my desire for more fulfillment, these activities only served to highlight the disconnect between who I was in different realms of my life and the ways in which my professional life was not reflective of my deepest passions. In fact, at that time, I had been feeling the call of change more urgently. I answered the call by making new commitments and explorations—pursuing a doctoral degree being one of them. I also finally ended my relationship. These changes, and my subsequent movement toward more of an authentic and generative life and "beingness" in the world, did not come without significant struggle. I struggled daily—practically and mentally—to keep these commitments to myself and to effectively enact my deepest intentions. Sometimes I felt unsure of my actions and lost around how to be in the world differently than I had been. Most significantly, my view of myself and my approach to my life had not changed in the ways I wanted to enact myself and my life.

This is a difficult struggle to write about on many levels. First, it challenges parts of my personal mythology—or my espoused theory (Argyris & Schon, 1974)—and my public persona of being in the world with fully aligned intentions and actions, and with authenticity and competence. It feels somewhat like telling on myself—admitting this

lack of awareness and insight, and ineffectiveness. Additionally, in writing about my epistemological and ontological edges, I am necessarily in tricky territory as not all of the landscape is available for my viewing. I do not have full insight around it.   In the language of constructive-developmental theory, I do not hold this knowing and experience as "object," but rather I am still "subject" to it (Kegan, 1984) (see Chapter 2 for a fuller explanation of this concept). I cannot fully see it; it is a blind spot. Indeed, this inquiry was as much about me coming to a new subject-object relationship around my own current way of knowing as it was about wanting to generally understand how to facilitate developmental shifts in adults who feel in over their heads.

Both of these realms—professional and personal—were two sides of the same coin. At their core, these struggles were about developing increased awareness of and greater competency in the ways that I brought myself to all of my life's endeavors. They were also ultimately about how I knew and experienced myself, others, and the world, and how I took action based on this. More concretely, some of the things I endeavored to do seemed simple on the surface or practically speaking. In most cases, I did not lack the knowledge, skills, or resources to do them, and in the instances where this was the case, I usually was able to take steps to eliminate those deficits. Rather, I found myself bumping up against an invisible wall or resistance that prevented me from fully enacting my skills and knowledge. I was also acutely aware of the fact that my way of knowing and being in the world was not enough for me to enact the life and relationships I wanted for myself—to dislodge this mental and practical "stuckness." That was a deeply painful and humbling experience, at times undermining my sense of confidence and self-efficacy. Of course, I continued (as I still continue) to pursue therapy, journal, process with friends

(which partially provided the impetus for this study), maintain an often inconsistent yoga and meditation practice, and experiment with other strategies to manage my multiple life worlds. Admittedly, after almost 10 years of concerted effort, I started to see the light at the end of the tunnel. However, before starting the study, I had the distinct feeling of trying to "push myself over" the epistemological and ontological "finish line" but not quite being able to complete the final leg of the journey. I was left with nagging and seemingly unanswerable questions: What would help to facilitate my further development and evolution of consciousness? What was needed now?

Our story. As it turned out, I was not alone in my consideration of these questions. The other women in the study had been asking similar questions. These questions and our shared interest in answering them were what prompted them to enroll in the study. In order to fully understand their experience of being in over their heads, I conducted a series of conversations (see interview guide in Appendix A) with each woman individually to get a sense of the concerns or issues that brought her to the study. Prior to our conversation, I also asked them to write a narrative response to the interview questions, which I also completed in congruence with my first-person research approach. The rationale for this type of data collection, as well as the process by which I gathered this information, is described in more detail in Chapter 3.

Before summarizing the collective concerns of the group, it is useful to provide a brief description of the group demographics. The group consisted of seven women of color, mostly Black (myself included); however, a few of us were not American-born or were first-generation American. All of us were between the ages of 30 and 50. Most of us were full-time working professionals with graduate degrees (one was a full-time

student and a couple were part-time students). Most of us were not married and did not

have children (one woman was married; one was separated with a child). Most of us

lived on the East Coast of the United States (two were living internationally in the

southeastern region of Africa).

Co-inquirers' written responses and follow-up interviews revealed several key,

shared concerns and themes that help to illustrate the concern that framed this inquiry.

Specifically, co-inquirers described wide-ranging, persistent life concerns and challenges

across multiple domains; challenges that were instrumental or logistical in nature but that

also involved an adaptive component whose solution often eluded us; a strong desire for,

but difficulty with movement and growth beyond our current state; uncertainty about the

future; and the need for more support and community. The following examples offer a

taste of how these concerns manifested practically[3]:

> Ruth: I've tried to put myself on a schedule many different times without success.
> I lack the discipline needed in order to accomplish my goals and have a healthy
> spiritual life. I find that when I put God first that He will take care of everything
> else in my life. But I also tend to slip back into old patterns of behavior that
> haven't worked in the past …
>
> Lily: I feel like I'm in an active state of growth and development which is
> uncomfortable and scary since I'm not sure what's going to be on the other side of
> it all … Even though I know what I want and have support, there's a way that I
> feel stuck and incapable of moving beyond this point. I lack a great deal of

---

[3] All names, except mine, have been changed to pseudonyms.

confidence and faith that things will work out—that I can cope and make things happen …

Danielle: My greatest struggle professionally will be trying to perform the duties of this new job well. In a larger context, there is an ever present expectation to use the skills, education, and opportunities I have had to make a difference in others' lives and to do the work that God has placed me on earth to do. But as I mentioned before, I'm still befuddled as to how to do this.

Rose: I often feel isolated. I wish I were closer to more of those people who inspire me, particularly those in my family. Some days I am afraid that my world is going to get too small … Few really understand what I'm doing here, and I have a hard time talking about it when I don't feel like I'm doing enough or have enough success to talk about. I don't feel that anyone can really relate to the challenges I deal with, or would necessarily think they are interesting or relatable…

This is a fitting opportunity to discuss the issue of therapy as a useful and necessary support for the women in this group, especially as it relates to some of the specific challenges we faced, some of which were personal and potentially psychologically-based. It is important to note that the personal challenges to which I refer did not, for the most part, relate to members dealing with any major psychopathology. That is, the overall challenge and concern that this inquiry examined was not related to the specific emotional or psychological challenges that we were experiencing. In my case, for example, I do not suffer from any mood, personality, or psychiatric disorders and have never received any such diagnoses throughout my many

years of therapy with different therapists. In fact, besides the relationship difficulties I described earlier, I was functioning quite successfully (if not always happily or efficiently) in other areas of my life, and generally felt capable of following through with my intentions—until suddenly, it seemed, I wasn't. Similarly, for the other women in the study, the overall concern extended beyond purely psychological challenges or even the specifics of the personal and professional circumstances in which they found themselves. Again, the challenges with which we, and this inquiry, were concerned centered on the much deeper issue of meeting one's epistemological and ontological edge, and not purely within the purview of therapeutic knowledge and intervention. In fact, some of us were in therapy at the time and had been for years while still struggling with the same issues, but we still found ourselves in need of additional support.

Furthermore, I question the idea that therapy is the only or best mechanism by which one can facilitate growth and development, particularly where no major psychopathology is involved. Kegan (1982), himself a psychologist, also challenged this notion, arguing:

> In an age when psychology has become the secular religion and the practice of psychotherapy the new priestly rite, the impression is often conveyed that the solution to life's ills could be found in universal psychotherapy, if only it were practical. The natural supports of family, peer groups, work roles, and love relationships come to be seen as merely amateur approximations of professional wisdom. From a developmental perspective this view of things is quite backward. Developmental theory has a long-standing appreciation of nature as the source of wisdom … However important and valuable the careful practice of "unnatural"

(self-conscious) therapy, developmental theory would seem to suggest that, rather than being a panacea for modern maladies, it is actually a second-best means of support, and arguably a sign that the *natural* facilitation of development has somehow and for some reason broken down. Not only does an understanding of "natural therapy"—those relations and human contexts which spontaneously support people through the sometimes difficult process of growth and change— offer "preventive psychology" a sophisticated way to consider a person's supports, it offers a new guide to therapeutic practice by exposing some of the details of those interactions which it is quite possible successful therapy is replicating, whether it knows it or not. (pp. 255-256)

This passage suggests that there is space for other types of supports to facilitate adult development and transformation beyond therapy. Particularly relevant to the field of adult education, educative and collaborative interventions—in non-therapeutic settings— may be just as or even more useful in facilitating development. This does not suggest that therapy is not important and needed, or that adult education and development (or this inquiry group) should replace "self-conscious therapy." I, in fact, have been an admitted proponent of psychotherapy for years—a strong believer in the power and importance of therapy in helping people to develop increased awareness and insight, alleviate emotional and psychological suffering, and treat major psychopathology. However, as I have come to understand the limits of therapy in my own evolution of consciousness and navigation of change, it has necessarily raised questions about other facilitators of and supports for growth and change. As many adults, beyond the women in this group, struggle fiercely

with being epistemologically and ontologically in over their heads—both within and outside of therapy—these are important considerations.

Statement of Inquiry Purpose

Given the previously stated concerns, the purpose of this action research (AR) case study was to explore the experience and facilitation of the evolution of consciousness in adults using the methodology of collaborative developmental action inquiry (CDAI). Specifically, I examined the following research questions:

1. Within the context of a CDAI group, what developmental supports and challenges facilitate the evolution of consciousness of women to more complex capacities and ways of knowing that allow for greater individual and social awareness and effectiveness?

2. How does the context of a CDAI group serve as an effective holding environment for the evolution of consciousness?

3. How does a CDAI group function as a system, and how does it develop collective capacity to evolve consciousness?

Conceptual Framework

This inquiry and its related conceptual framework (see Figure 1) were informed by Kegan's (1982, 1994) constructive-developmental theory and Torbert's (2004) collaborative developmental action inquiry (CDAI) approach, which are described in more detail in Chapters 2 and 3. Specifically, this inquiry focused on what type of holding environment and facilitative actions help adults evolve from their current stage of consciousness to a more complex stage. I primarily utilize an action inquiry (Torbert & Associates, 2004) and constructive-developmental (Kegan, 1982, 1994)

conceptualization of consciousness as the scope and quality of one's awareness (Torbert & Associates, 2004) and one's meaning-making structures and complexity of "thinking, feeling, and social-relating" (Kegan ,1994, p. 32). As shown in the conceptual framework, I proposed (and explored through this inquiry) that with the developmental support and challenge of an appropriate holding environment, a person can evolve from her or his current stage of consciousness—which comprises her or his scope and quality of awareness and meaning-making complexity—to a more complex stage of consciousness for greater personal and social effectiveness. Further, I proposed that the CDAI approach and method provide an appropriate and useful holding environment conducive to the evolution of consciousness. My primary assumption was that CDAI offers the depth and breadth of complexity for such deep transformation through its attention to the four territories of experience, the three levels of research and practice, the four parts of speech, and timely action and inquiry (described in more detail in Chapter 3). The depth and breadth of CDAI, and its related concepts and practices, are designed to increase both the quality and scope of one's awareness and, in turn, one's meaning-making complexity.
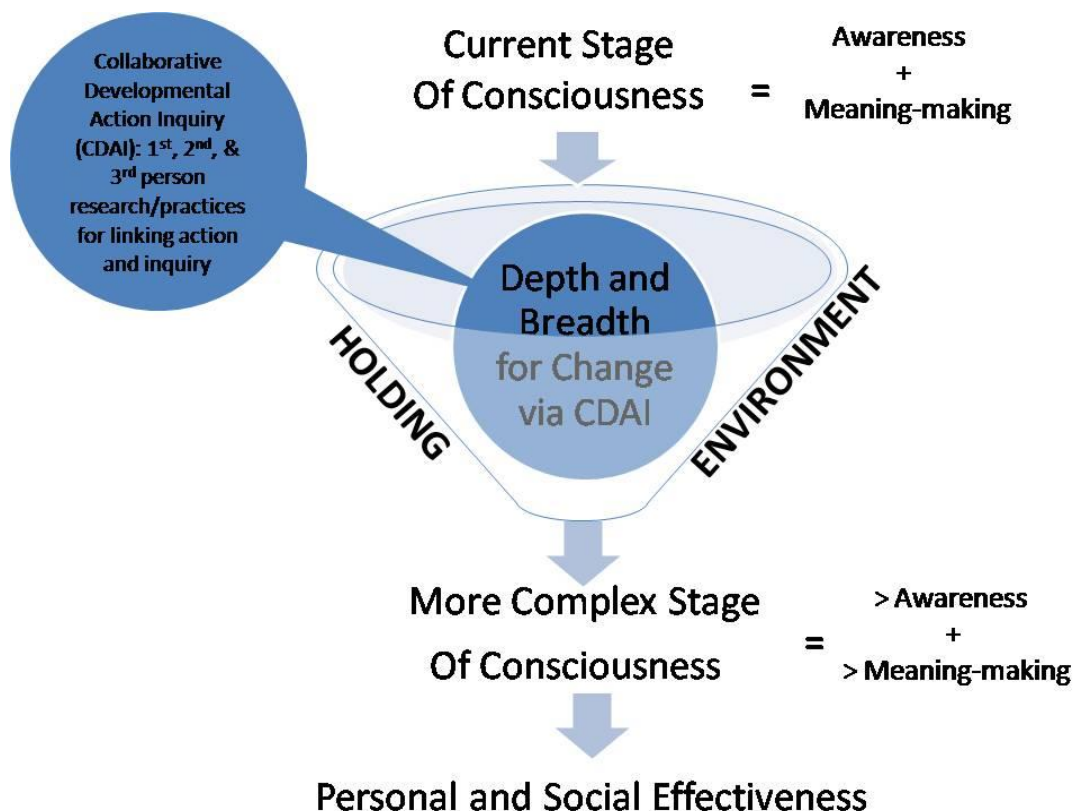
Figure 1. Conceptual framework of the facilitation of evolution of consciousness using CDAI.

Group Bounds: A Specific and Intentional Bracketing

It is important to note that this study was explicitly bounded by women of color's experiences of the evolution of consciousness. Specifically, the majority of the women in the group self-identified as Black; however, there were a couple who self-identified within other non-White racial and cultural categories (e.g., bi-racial, Cape Verdean, Asian/Chinese). As such, the term *women of color* is meant to describe the collective racial and cultural composition of the group rather than represent a statement about the equal representation of different racial and cultural groups of women of color (e.g., Latina, Native American, etc.). This is congruent with the assertions of women's

reproductive rights activist Loretta Ross (2011), who cautions against using a purely

racialized definition of the term *woman of color*, which she describes as "a solidarity

definition, a commitment to work in collaboration with other oppressed women of color

who have been 'minoritized'" (Ross, 2011). It is also important to disclose that I did not

initially choose to bind the group in this way. However, because of the initial group

formation process, during which I invited close others as the first co-inquirers (described

in more detail in Chapter 3), the group happened to comprise Black women. As I

reflected on this fact and considered the literature around this topic, I realized that this

was a powerful opportunity to study the evolution of consciousness in a population—

women of color—that is not typically examined through this lens. Indeed, most of the

research conducted around constructive-developmental theory does not explicitly address

issues of racial and cultural diversity (Kegan, 1994). When issues of diversity do arise,

they usually cluster around gender and educational level (Kegan, 1994). Regarding

gender, Kegan (1994) devoted an entire chapter to addressing feminist claims that

constructive-developmental theory is male-centric and to describing the difference

between his subject-object "ways of knowing" and Gilligan's stylistic "ways of knowing"

(Kegan, 1994, Ch. 6) and how it is possible to enact gendered stylistic differences within

his stages of consciousness. As it relates to women of color, and specifically Black

women, much of the overall theoretical scholarship around race and culture

understandably focuses on critical race theory and racial vulnerability and oppression.

Cultural critic and Black feminist theorist bell hooks (2001) discussed the need to address

issues beyond critical race theory and oppression. Specifically, in her work, she has

called for a re-focus on a love ethic from the early civil rights movement as a means of

resistance against nihilism and dehumanization, and as a necessary dimension of

liberation and self-actualization. In contextualizing the importance of focusing on love

(and other human issues of deep feeling) she writes:

> Early on in our nation's history, when white settlers colonized Africans through
>
> systems of indentured labor and slavery, they justified these acts of racial
>
> aggression by claiming that black people were not fully human. In particular it
>
> was in relation to matters of the heart, of care and of love, that the colonizers drew
>
> examples to prove that black folk were dehumanized, that we lacked the range of
>
> emotions accepted as a norm among civilized folk. In the racist mindset the
>
> enslaved African was incapable of deep feeling and fine emotions … When
>
> slavery ended, many of the racist stereotypes that had been used to subordinate
>
> and alienate black people were challenged. But the question of whether or not
>
> black people were capable of love, of deep and complex emotions, continued to
>
> be a subject for heated discussion and debate. (hooks, 2001, p. xix)

She goes on to state that the abandonment of considerations of and a discourse on love in

the Black liberation struggle has fueled the creation of nihilism, despair, and violence

within the Black community, as well as the continued denigration of blackness both

within and outside of the Black community (hooks, 2001). While this inquiry did not

focus on love or on race (or gender), I conducted it with women of color in order to

contribute to the various literatures (e.g. constructive-developmental theory, CDAI,

critical race theory) that have not adequately considered or explored the issue of

consciousness in women of color, as mentioned earlier. In this way, I followed the

suggestion of hooks (2001) and social activist, philosopher, and cultural critic Cornel

West (1994) that more attention be paid to the "souls of black folk"—albeit for slightly different reasons. hooks (2000, 2001, 2002), a woman of color, began her considerations of love from her own, first-person experience of lovelessness and seeing an opportunity (and need) to extend her considerations to the larger Black community. Similarly, my desire to explore the evolution of consciousness in women of color stemmed from my personal considerations of my own evolutionary process and struggle, and that of close others around me who happened to be women of color. As such, this inquiry is also a love offering toward the fuller exploration of the "deep feeling and fine emotions" of women of color beyond typically race-based, purely critical, or oppression-focused considerations, and beyond non-diverse or non-culturally focused considerations of adult development and transformation.

Significance

This study is timely and relevant for several reasons. The demands on adults are ever-increasing, and many adults struggle with the various requirements and challenges of adulthood, and struggle to make the necessary shifts in perspective needed to meet these challenges (Kegan, 1994). In fact, one could say that success in adulthood can be defined not so much as a set of specific social and economic achievements but as the ability to cognitively and practically manage the range of requirements and demands of adulthood. This requires an ongoing process of learning and adaptation that many adults struggle with on their own. The fields of adult education and organizational studies have focused attention on helping adults and organizations navigate this new landscape, emphasizing the need to help adults develop competencies and greater capacities for managing and taking action within the complexity of modern-day life (Nicolaides &

Dzubinski, 2015; Nicolaides & Yorks, 2008). Additionally, the field of psychology (including some of its subspecialties, such as humanistic psychology and constructive-developmental psychology) and mental health providers are keenly focused on helping individuals cope with and manage the various mental and emotional struggles they face. In fact, the constructive-developmental approach, which framed this inquiry, is rooted in psychology and development theory. Additionally, all of these disciplines express an interest in helping and working with adults individually, relationally, or in groups. However, there is little discussion or empirical evidence around how to intentionally facilitate development in adults. This study is concerned with this gap. My hope is that this study contributes meaningfully to these conversations.

Organization and Structure

This chapter introduces and provides an overview of the deeply personal but broadly relevant concern at the heart of this inquiry, namely the challenge of meeting the demands of 21st-century adulthood and the epistemological capacity-demand mismatch that often surfaces. In the chapters that follow, the story of this inquiry and some of its outcomes unfold. Chapter 2 reviews the relevant concepts, theories, and literature that framed this inquiry, particularly those presented in the conceptual framework. Chapter 3 describes the research paradigms and design, methodological approaches, and actual methods employed in this inquiry. It also describes the contexts of the study in more depth, along with other relevant considerations. Chapter 4 tells the story of the developmental arc and movements of the group throughout the study. Chapter 5 presents the key learnings—including thick illustrations and interpretations—that I gleaned from

the inquiry data. Chapter 6 presents the meta-insights I drew from the key learnings, and their potential implications for future research and practice.

If it is not already evident from my choice of CDAI as the paradigmatic approach for this inquiry, and from the content and written presentation in this chapter, this was a deeply personal, radically subjective and intersubjective inquiry. As such, I have taken certain liberties with the structure and form of this third-person presentation to maintain the integrity and shifting needs of this inquiry's representation, while also serving this document's purpose as a key demonstration of my scholarly production of independent knowledge as recognized by my academic discipline. Overall, I have adhered to the standard meta-structure of the dissertation (e.g., overall chapter structure and nomenclature) for the sake of organization and clarity; however, there are often significant, purposeful departures in intention, presentation, language, and content demonstrated throughout. More specifically, I employ a narrative tone and style congruent with the radically subjective nature of the inquiry. This dissertation presents my first-person narration of second-person research and inquiry and its third-person outcomes. In many ways, like the study, this dissertation and the process of writing it was its own action inquiry—a moment-by-moment exploration into the most relevant and useful action (in this case, delineation of my ideas and their written expression) toward the completion of this document and contribution to various academic conversations and society. This dissertation does not represent a completion but rather my best current iteration.

CHAPTER 2

LITERATURE REVIEW

Perhaps the secret of living well is not in having all the answers, but in pursuing unanswerable questions in good company.
                                                                        —Rachel Naomi Remen

Given the need for continuous adaptation in adulthood, it becomes critical to

understand how adults come to develop more complex capacities and ways of knowing

that allow for greater personal and social awareness and effectiveness. Specifically, what

are the "supports, scaffolding, appropriate developmental challenges, and encouragement

for growth" (Kegan, 2001, p. 7) that are needed to facilitate learning and development?

This is a key question with which many adults and those who seek to support their

learning and development continuously grapple. As described in the previous chapter,

this question is also personally relevant. However, as this challenge and curiosity is not

unique to me, I was particularly interested in figuring this out in community—essentially

inquiring with a small group of intensely interested others. For many, the immediate

question that arises from that stated interest may be around the justification for and

benefit of undertaking such a personalized inquiry in collaboration with others—with an

adult development and learning perspective and outside of the context of individual

therapy. This review is the beginning of a theoretical and empirical response to that

question. In fact, this review represents only one aspect of the entire landscape of my

inquiry, but one that I believe is crucial in its contribution to the justification, method,

and possibilities for a CDAI approach to this inquiry. Specifically, in this chapter I

examine the practice of collaborative inquiry—which broadly encompasses CDAI—as a method of interrogating the process of adult learning and development through a review of the relevant literature. This focus has turned out to lead me to key understandings and framings in the pursuit of my larger purpose, as shall hopefully become clearer momentarily. First, I discuss transformative learning and transformation through the lens of constructive-developmental theory as a foundation for my thinking about collaborative inquiry groups as facilitators of development and transformation. From there, I review the relevant empirical literature on collaborative inquiry, highlighting key themes and ideas. Finally, I conclude with a review of the relevant literature related to CDAI as a specific type of collaborative inquiry. Of note, I will introduce and define key terms and concepts, as appropriate, throughout this chapter as a foundation for the deeper discussions that follow in later chapters.

As part of this review of the literature, I queried the education, psychology, and business literatures using Google Scholar, Educational Resources Information Center (ERIC), PsychINFO, and ABI/Info Complete. I used an emergent search process beginning with a variety of terms taken from key themes related to the topic and using the relevant key terms from the particular database thesaurus in various combinations (using Boolean phrases). Search terms included: collaborative inquiry, adult education, adult learning, group learning, group therapy, self-help groups, adult development, communities of practice, second-person inquiry, psychological development, collaborative developmental action inquiry, developmental action inquiry, and holding environments. I also conducted searches of key authors whose scholarship is focused in these areas, such as Eleanor Drago-Severson, Robert Kegan, Bill Torbert, John Heron,

Peter Reason, and Etienne Wenger. Once relevant literature (e.g., articles, dissertations, etc.) was identified, I reviewed their reference list for additional key literature. Finally, since beginning this inquiry, I have had the privilege of connecting with key others within the relevant scholarly and practice communities. Through these connections and interactions, I have been introduced to additional relevant and current literature as needed, which proved to be a particularly useful approach.

During this broad search, I found virtually no empirical studies on the application of constructive-developmental theory in groups toward intentional development. Additionally, while the theoretical roots of CDAI are deep, it is still a relatively nascent area of study, there is not a large body of empirical literature that employs CDAI as a methodology, and most of the available studies are in unpublished doctoral dissertations. I will review and describe these as they are relevant in illuminating important considerations for this inquiry. Because of the scarcity of studies on CDAI, I have widened my lens and considerations to collaborative inquiry; a related, umbrella approach. However, the scarcity of studies using a CDAI approach, especially outside of purely educational or professional settings, further speaks to the need for this inquiry and the gap in the literature that it addresses.

Constructive-Developmental Theory

Before addressing the focus of this literature review—collaborative inquiry—it is important to consider the issue of adult development and transformation. In this regard, I, and others (Drago-Severson, 2009; Torbert, 1999), find constructive-developmental theory conceptually and practically appropriate. Constructive-developmental theory is a stage theory of adult development that seeks to explain how adults evolve progressively

over time in the ways that they make sense of themselves and the world. There are numerous types of constructive-developmental theories, but the term was first coined by Kegan (1982) as one of its earliest proponents and Kegan's stream is the one which will be referenced in this paper. Kegan's constructive-developmental theory extends the work of Jean Piaget (1954) with children and focuses on how adults make meaning of themselves and their worlds across the lifespan. It is constructive in the sense that it addresses how a person constructs or interprets his or her experience and it is developmental in that it addresses how these constructions and interpretations develop or grow in complexity over time.

Constructive-developmental theory posits several key concepts. First, Kegan (1982) describes six stages or *orders of consciousness*[4], essentially meaning-making perspectives that a person progresses through from infancy to adulthood: incorporative (0), impulsive (1), imperial (2), interpersonal (3), institutional (4), and inter-individual (5). The later three stages are the most discussed and considered in the context of adult development as the earlier two are related to childhood and adolescence. As such, the six stages are often divided conceptually into three distinct categories - dependent, independent, and interdependent—with stages 0-2 falling into the dependent category, stages 3-4 falling into the independent category, and stage five falling into the interdependent category based on the level of dependence of their self-concept on self or others. Kegan has renamed the three later stages in his later work: Traditional

---

[4] Given the range of adaptations to and streams of developmental theory, there are other terms used to describe orders of consciousness. Some typical ones include: stages (of development), orders or habits of mind, forms of mind, action logics (to be described in more detail later), ways of knowing, and meaning-making perspective/complexity/capacity. Because, this inquiry draws from both Kegan's (1982, 1994) and Torbert's (2004) conceptualizations of development, I use some of these terms interchangeably and fluidly throughout this document.

(Interpersonal), Modern (Institutional), and Post-modern (Inter-individual) (McCauley et al., 2006). Other popular terms for these stages, include: the socialized mind, the self-authored mind, and the self-transforming mind, respectively. Table 1 provides an overview of the framework, along with Kegan's multiple terminologies.

Table 1

Overview of Kegan's Constructive-Developmental Framework

	Dependent/Socialized Mind	**Independent/Self-Authoring Mind**	**Inter-independent/Self-transforming Mind**
Kegan's Orders of Consciousness	*Interpersonal / Traditional / 3rd Order*	*Institutional / Modern / 4th Order*	*Inter-individual / Post-Modern / 5th Order*
What is object?	Enduring needs and dispositions	Interpersonal relationships	The autonomous self
What is subject?	Interpersonal relationships	The autonomous self	The transforming self

Note. Adapted from Brown (2012) and McCauley et al. (2006)

Adults at the Traditional/Interpersonal stage (the socialized mind) have a sense of themselves mostly in relation to others. While they are able to reflect on their own needs and desires, because they gain confirmation through their interpersonal relationships, they are able to override their own needs and desires for those of others. People at this stage often internalize the feelings of others and are guided by the people and institutions that are most important to them. As such, mutual respect and affiliation are primary concerns. This transition (from the preceding stage) usually happens in adolescence and early adulthood.

For adults at the Institutional/Modern stage (the self-authored mind), the role of the other shifts; no longer is confirmation gained purely through others. Adults at this

stage recognize a self that exists outside of its relationships. As such, they perceive and

rely on their own personally generated values and desires and use these to mediate

between their own and other's values. Competence, achievement, and attainment of one's

own deeply held values and purpose are primary concerns. Most adults who transition

into this stage do so in the middle and later years. Research has demonstrated that most

adults fall into the Traditional (socialized mind) and Modern (self-authored) stages

(Berger, 2012; Kegan, 1994; Rooke & Torbert, 2005).

     Adults at the Interindividual/Post-modern stage (the self-transforming mind) are

able to fully manage the complexity between their own knowing and experience and that

of others. They perceive that their identity and values are fluid and constructed over time

through their own conceptions and through interactions with others. They are able to see

the limits of their own values and "inner systems," as well as see similarities between

their own and others' values and inner systems. In this way, they are often able to move

away from a view of the world as dichotomous and think at a systems level. As such,

personal growth and ongoing development of themselves and others is the primary

concern. This is considered a rare order of consciousness that very few people attain.

     Each stage typifies a different "subject-object differentiation" (Kegan, 1982, p.

28) whereby a person develops different relationships to what he or she constitutes as

"subject" and as "object." Specifically, orders of consciousness or perceptions to which a

person is subject are taken for granted and hidden from the person. He or she identifies

with those perceptions; they are his or her identity. Orders of consciousness or

perceptions that are object are outside of the person and therefore available for reflection

and revision. As a concise explanation, Kegan (1994) wrote, "we *have* object; we *are*

subject" (p. 32). Once a person progresses from one stage to another, what was subject (or hidden) at the earlier stage becomes object (or seen) at the later stage and the perceptions at the later stage become subject until progression to the next stage at which time they then become object and so on. Additionally, the perceptions and ways of knowing from previous stages become incorporated into later stages such that a person is increasingly gaining access to a wider, more comprehensive perspective (or capacity for perspective-taking) that includes more of self and others. However, a person's order of consciousness influences what he or she is able to notice and become aware of, and thus what is available for description, reflection, and change. This is necessarily important to keep at the forefront of any focus and attempts to help adults learn and develop.

Additionally, Kegan cautions against privileging later stages over earlier ones or confounding them with intelligence or education (Kegan, 1994, 2009). Rather he argues that the primary consideration is whether the individual's capacity (or stage) is in line with the complexity of the demands to which he or she is subject. This speaks to the epistemological demand-capacity alignment issue discussed in Chapter 1. In effect, one could argue that a person needs only as much mental capacity as his or her life and society demands. Once the demands change or, put another way, once the current meaning-making system no longer serves, the person is theoretically "ready" or "required" to transform to the next stage. Unfortunately, this process is not usually so simple or straightforward; hence the need for appropriate supports and scaffolding.

Development from One Stage to Another as Transformation

The movement from one order of consciousness or stage to another is akin to the transformative learning experience described by Mezirow (Kegan, 2009; Mezirow,

1990). Specifically, Kegan's *orders of consciousness* are referring precisely to the same concept as Mezirow's *frames of reference* (Kegan, 2009). Both are essentially referring to a person's epistemology or way of knowing. In his Transformative Learning theory, Mezirow outlines a ten-step process, in which critical reflection on experience is a major component. Mezirow asserts that in order to learn from and act based on a new experience, one must critically reflect on that experience in order to come to deeper understandings (Merriam, Caffarella, & Baumgartner, 2007; Mezirow, 1990). While it is possible to learn without reflection, this type of learning is typically rote and related to changes in *what* we know (e.g., knowledge, thoughts, or strategies) or instrumental learning, rather than changes in *how* we know (e.g., orders of consciousness or frames of reference) or transformative learning (Merriam et al, 2007; Mezirow, 1990). Instrumental learning is necessary in some cases and allows us to extend our repertoire of experience and skills into new spheres and situations. However, it is transformative learning, which leads to changes in perspective and worldview that allows for previously unimagined possibilities and creative action in the present and future. This type of learning is considered the hallmark of maturation and growth, and adulthood (Brookfield, 1987, p. 39.; Mezirow, 1990, p.13). It is also considered emancipatory in that it allows for more awareness and freedom of action (Cranton, 1996; Mezirow, 1981, 1990). Cranton writes: "Transformative learning empowers individuals, as options and alternative ways of seeing the world become available. If I do not know there is a choice, I am less free … the goal is freedom from the constraint of not knowing" (Cranton, 1996, p. 29). Similarly to Kegan (1982, 1994), Mezirow stipulates certain conditions (or supports) under which transformation is possible (Merriam et al, 2007; Mezirow, 1990).

Specifically, the critical reflection Mezirow describes as crucial to transformative learning is often mediated through discourse with others who are able to interrupt or challenge a person's taken-for-granted assumptions. It is against this backdrop that learning and transforming in community (or in relationship) becomes important. Similarly, as mentioned above, Kegan talks about "supports, scaffolding, appropriate developmental challenges, and encouragement for growth" (Kegan, 2001, p. 7), which do not occur in isolation.

Collaborative Inquiry

Learning and Transforming "With"

Collaborative inquiry or co-operative inquiry (CI) is a form of action research (AR) that focuses primarily at the individual and group levels rather than the system level and where everyone involved is both a co-researcher and co-subject (Coghlan & Brannick, 2010; Kasl & Yorks, 2002b; Reason, 1999). Similar to AR, it involves structured cycles of action and reflection that allow participants to learn from their experience. CI is based theoretically and methodologically in the work of Heron and Reason (2006), which explicitly argues that research be solidly grounded in the whole-person, personal experience of the researchers/subjects (Heron & Reason, 2006; Kasl & Yorks, 2002b). Specifically, they outline an "extended epistemology" that involves four distinct ways of knowing[5] that are attended to and activated through CI: experiential, presentational, propositional, and practical (Heron & Reason, 2006; Kasl &Yorks, 2002b). Kasl and Yorks (2002b) provide a clear and concise description, writing:

---

[5] These are not meant in the developmental sense.

Experiential knowing is evident when we meet and feel the presence of some

energy, entity, person, place, process, or thing. Presentational knowing is

expressed in graphic, plastic, moving, musical, and verbal art forms.

Propositional knowing is formulated by intellectual statements, both verbal and

numeric, organized with logic and evidence. Practical knowing is evident in

knowing how to exercise a skill (Heron, 1996, p. 33). (Kasl &Yorks, 2002b, p. 6)

These different types of knowledge are interrelated and build on each other in a pyramid-

like fashion with experiential knowledge at the base and practical knowing at the top. In

this way, Heron and Reason address the entire range of a person's experience as a way of

facilitating communication and understanding of that knowledge, which is essential to CI

and group meaning-making (Heron & Reason, 2006; Kasl &Yorks, 2002a, 2002b). Kasl

and Yorks (2002a) write: "Heron presents the four ways of knowing as a cycle: the

learner *experiences* a felt encounter which is grasped and *presented* intuitively, expressed

propositionally and extended into *practical* action" (Kasl &Yorks, 2002a, p. 2).

While the specific goals of a CI group can be as varied as the groups and

members themselves, group outcomes are often transformational in nature as groups

implicitly and explicitly assist members with taking on and enacting new perspectives

both within and outside of the group. Cranton (1996) writes:

 In transformative group learning, individuals take responsibility for their own

learning. They seek out new perspectives, challenge commonly held views,

question themselves and each other, and often work toward change outside of the

group or program. Learners may identify problems and constraints that they share,

define collective goals, and engage in group action to address their concerns. The

focus may be on epistemic perspectives (knowledge-based) if learners are

working in the same profession or subject area. It may be on sociolinguistic

perspectives (social norms and the use of language) if people share a concern with

a social issue, such as sexism or racism; or the emphasis may be on psychological

perspectives if the individuals are working toward a common personal goal—

recovering from an abusive relationship, for example. (Cranton, 1996, p. 30)

Through their work, Kasl and Yorks (2002a) also make a direct connection between CI

and transformative learning. They suggest that CI's extended epistemology actually

supports and furthers the possibility of transformative learning through its attention to

multiple ways of knowing beyond the purely cognitive (a typical criticism of Mezirow's

theory) (Kasl & Yorks, 2002a). Furthermore, they argue for the transformative value of

learning in community (or relationship), writing:

Learning from experience and transformative learning are both supported by

learning in the context of a group. The context of group has several benefits.

Groups offer ready access to diverse and challenging perspectives. They create

social support for construction and reconstruction of meaning. Collaborative

inquiry groups typically meet for an extended period of time, thus making it more

likely that members will develop the trust and empathy that is associated with the

whole-person epistemology of learning-within-relationship. (Kasl &Yorks, 2002a,

p. 7)

While, examples of this form of AR are not abundant, there are several examples of CI in

non-professional settings that describe the benefits, including transformative learning, of

CI (Dyer & Loytonen, 2012; Kasl & Yorks, 2002c). In a rare special journal issue

looking at CI for adult learning, eight diverse cases of CI are presented that demonstrate its transformative potential (Kasl & Yorks, 2002d). The CI groups described run the gamut from nursing managers inquiring into ways of communicating that promote mutual respect and cohesiveness in the workplace to Jewish women seeking to understand, heal from, and resist internalized oppression. In all of the groups, participants described experiences of transformative learning and/or healing from the group. Participants in CI groups of Caucasian-Americans focused on examining "White Supremacist Consciousness" described shifts in their meaning-making perspectives as a result of having the space to acknowledge and examine previously unexamined and un-discussed beliefs and assumptions (Barlas et al., 2000; European-American Collaborative Challenging Whiteness, 2002). In another group, transformations in perspective were facilitated through the development of critical subjectivity that occurred as a result of gentle challenge from other group members in the form of a structured group practice of playing "devil's advocate" (Rosenwasser, 2002).

Another theme that emerged in the literature around how CI supports transformation is the practice of the multiple ways of knowing. Several studies mentioned the importance and expression of various ways of communicating experience, particularly presentational knowing, beyond the purely cognitive (Dyer & Loytonen, 2012; Rossenwasser, 2002; Weinberg Zelman, 2002; Wherrett Roberson, 2002). The use of metaphor, dance, poetry, storytelling, painting, and movement were not uncommon and group members often attributed these expressions as part of the groups' power and effectiveness. Rossenwasser (2002) writes of her CI group:

> I personally learned that a fully dimensional learning experience is key to a
>
> transformative learning environment—one that engages the physical, cognitive,
>
> intuitive, emotional, creative, and spiritual realms—allowing us as learners to
>
> access and bring all of ourselves to the inquiry, thus expanding our ability to learn
>
> from our experience. (Rosenwasser, 2002, p. 61)

Further, in support of practical knowing, CI groups also promoted changes in behavior or

social action (Barlas et al., 2000; Rossenwasser 2002; Weinberg Zelman, 2002; Wherrett

Roberson, 2002). These actions were both part of CI's action-reflection cycle and a

result of the transformative learning that took place, which opened up the possibility for

new responses. Weinberg Zelman (2002) writes:

> As a direct result of the learning that occurred through the process, some
>
> participants were able to take risks in the "outside" world they would not have
>
> considered possible prior to this experience. (Weinberg Zelman, 2002, pp. 40-41)

These practices and outcomes speak to CI's usefulness as a tool not only for enhanced

awareness, but also more effective action in the world.

Collaborative Inquiry as Holding Environment

A key aspect of CI's learning and transformative power undoubtedly rests in its

function as a good holding environment. In his discussions of appropriate supports and

challenges for developmental movements, Kegan (1982, 1994) talks about the holding

environment, a concept borrowed from Winnicot (1960) who discusses it in the context

of the mother-infant and the therapist-client relationship (Kahn, 2001; Kegan, 1982;

Winnicott, 1960). In both Kegan's and Winnicott's conceptions, the holding

environment offers intensive support, care, and relationship that facilitates the

development process by providing a space of security that buffers the anxiety produced by internal and external shifts and explorations of new landscapes (Kahn, 2001; Kegan, 1982; Winnicott, 1960). Kegan (1994) argues that good holding environments are necessary for developmental shifts, writing:

> Such supports [of development] constitute a holding environment that provides both welcoming acknowledgement to exactly who the person is right now as he or she is, and fosters the person's psychological evolution. As such, a holding environment is a tricky transitional culture, an evolutionary bridge, a context for crossing over. It fosters developmental transformation, or the process by which the whole ("how I am") becomes gradually a part ("how I was") of a new whole ("how I am now"). (p. 43)

In order to be effective, however, holding environments must be more than simply supportive. According to Kegan (1994), they should also provide appropriate challenge and they should be well-anchored (that is persist) on both sides of the developmental transformation. Specifically, he asserts that good holding environments should provide both "high support and high challenge" as part of its "tricky transitional culture" (Kegan, 1982, 1994). Following the conceptualization of holding environments as "bridges," they also serve the three functions of "holding on, letting go, and sticking around" (Kegan, 1982, p. 121). In this way, they affirm, accept, and "hold" the individual at his or her current stage (holding on); allows and supports (and often spurs) the individual's shift in meaning-making complexity (letting go); and are stable or present on the other side of an individual's developmental shift, which can be disorienting (sticking around).

Collaborative inquiry groups, as conceptualized and practiced, meet the criteria for an effective holding environment. They attend to and provide support for the expression of participants' experience multiple ways of knowing. Through the expression and testing of divergent assumptions and experiences, CI groups challenge participants' taken-for-granted assumptions and ways of knowing. Additionally, they are typically conducted over extended periods of time that allow for full exploration of the inquiry of interest and the subsequent transformative learning of group participants (Dyer & Loytonen, 2012; Kasl &Yorks, 2002c). Participants in the Challenging Whiteness CI groups reported that the groups created contexts of trust and support that allowed them the vulnerability to engage in critical self-reflection and challenge their own beliefs and behavior (Kasl & Yorks, 2002b).

In summary, collaborative inquiry is a viable approach to fostering adult learning and transformation through its function as an effective holding environment; use of multiple ways of knowing and expressing experience; and its use of action-reflection cycles that prompt transformative and emancipatory action. Furthermore, transforming with others is likely not only ideal, but necessary.

Collaborative Developmental Action Inquiry

Collaborative developmental action inquiry (CDAI) (Torbert, 1999; Torbert & Associates, 2004) extends CI and offers a more specific and appropriate approach and methodology for this inquiry. Specifically, CDAI combines two key theoretical perspectives: action inquiry and developmental theory (Chapter 3 offers a much more detailed description of CDAI) (Foster, 2012). In this way, it is both action-oriented and developmentally focused for the purposes of helping individuals, groups, and

organizations to effectively and simultaneously inquire into a situation (from multiple levels and perspectives) and take appropriate action in the moment. This process of timely and effective action necessarily involves and requires increased levels of awareness and more complex meaning-making capacity—hence the developmental focus. Specifically, "the process of collaborative action inquiry involves paying attention to one's experience on multiple levels to assess whether our actions, in the moment, are aligned with our intentions" (Banerjee, 2013, p. 36).

As part of developing greater meaning-making capacity and the ability to inquire and act in a timely fashion, CDAI suggests that "self-reflection, action inquiry, and dialogue as well as living in the company of others further along on the developmental path has been shown to be effective" (Cook-Grueter, 2004, p. 277). Furthermore, Torbert (2004) extends constructive-developmental theory by delineating an approach and method by which individuals can use intentional communities of practice and inquiry to develop. Torbert (1991, 2004) also describes the use and practice of CDAI amongst friends, colleagues, and family, but also within Foundational Communities of Inquiry that can be formed within developmentally-advanced organizational structures.

However, there are only a few studies that actually examine this assertion or rather consider CDAI as part of their inquiry (Banerjee, 2013; Brown, 2012; McCallum, 2008; Miller, 2012; Nicolaides, 2008; Nicolaides & Dzubinski, 2015). These studies demonstrate that having more complex meaning-making capacity does indeed allow one to more effectively lead, particularly in complex environments, (Banerjee, 2013; Brown, 2012); engage in transformative learning and benefit from educational supports and challenges (McCallum, 2008; Miller, 2012; Nicolaides & Dzubinski, 2015); and

experience and navigate ambiguity (Nicolaides, 2008; Nicolaides, 2015). Of these, however, only three utilized an action research approach to CDAI with the purposes of intervening in a group or system to actively further development and increased effectiveness (Banerjee, 2013; Miller, 2012; Nicolaides & Dzubinski, 2015). Banerjee (2013) utilized a CDAI approach to develop and support the leadership capacities of early-career scientists in the context of a leadership academy within the large technical health organization where she was employed. Specifically, her study involved conducting 10 monthly (three hours each) action inquiry sessions with seven early-career scientists and convening an AR team comprising nine supervisors and/or mentors of these scientists. The AR team held six meetings (two to three hours each) to plan and discuss the action inquiry sessions. The sessions mostly involved the use of action inquiry case-based learning whereby the early-career scientists chose and presented problematic critical incidents or challenges from their work in a structured process to be reviewed and discussed with other members of the group as a way to examine the scientists' underlying meaning-making and to encourage a wider perspective about issues. AR team members and early-career scientists were also introduced to CDAI's four parts of speech as a method to improve their communicative actions (see Chapter 3 for more detail).

Banerjee (2013) found that for these early-career scientists the CDAI approach created a flexible and adaptive "micro-culture" that offered a sense of community and connection that was extremely important in helping them navigate professional, adaptive challenges. She also noted that CDAI provided opportunities for respite, reflection, new meaning-making and perspective-taking, and different action that did not exist outside of the CDAI-based training context. Not only did CDAI support the development of the

early-career scientists (i.e., the intervention group), but it also revealed the adaptive

challenges faced by the AR team (their supervisors and mentors) in supporting them and

allowed for AR team members' development. Additionally, the use of CDAI created

second-person communities of inquiry that helped to shift how early-career scientists, and

their mentors and supervisors, related interpersonally. Perhaps most significantly, the AR

team members and the early-career scientists were able to engage in single-, double-, and

triple-loop learning (Torbert & Associates, 2004) toward solving adaptive challenges

through CDAI. As a result of these first-person changes, the early-career scientists

successfully planned a large-scale intervention using their newly developed adaptive

leadership capabilities—which had a positive system-wide impact. Finally, Banerjee

noted that her leadership capacity increased as a result of conducting the study.

Similarly, this study offers support for the usefulness of CDAI in developing leadership

capacity within an organizational setting.

In a very different context—and on the more non-traditional end of the AR

spectrum—Miller (2012) used a CDAI approach to explore and transform her pedagogy

in an undergraduate leadership studies course over four semesters with different cohorts

of students. Miller used a radical subjectivity in her enactment and presentation of

CDAI, employing an "action research process of recursively asking and answering living

questions about the method of undergraduate teaching and learning, with the students

involved as co-researchers" (Miller, 2012, p. 1). Her first- and second-person research

was integrated with the course curriculum and organization and sought to meet the

learning outcomes of the course while examining her and the students' experiences as a

case study for learning about and exercising leadership. Toward this end, she and her

students captured and considered data at the first-, second-, and third-person levels. Through the process of enacting her increasingly inquiry-based teaching and learning approach and multiple action inquiry cycles over the course of each semester's cohort of students, not only did students experience increased agency around their own learning and leadership, but Miller was able to develop and implement a more experimental and emancipatory pedagogy that helped to facilitate students' shifts. She described her active engagement with and process of double-loop learning in real time, demonstrating CDAI in action. Miller's is one of the few studies that rigorously enacts CDAI through an ongoing and transparent revision of researcher purpose, strategies, and actions. Additionally, she invited her dissertation committee into the action inquiry of the study as part of a collective consideration of emancipatory pedagogy and methodology. Further, she restructured the traditional chapter form and organization of the dissertation to present her story and learning narratively, according to the action research cycles as they unfolded over the course of the inquiry.

Finally, Nicolaides and Dzubinski (2015) described an inquiry that utilized CDAI as part of a layered research study examining the functioning of adult education programs and their ability to better support adults in meeting the demands of 21st-century society. The researchers were particularly interested in the transformative learning potential of their CDAI methodological approach. The study involved the formation of teams of researchers who engaged in rounds of critical reflection and collaborative inquiry around the topic of adult education, while also engaging participants—graduate students, alumni, and colleagues in adult education—in critical reflection about the topic through interviews and focus groups. The rounds of inquiry served as first- and second-person

data collection and analytical processes. Specifically, in their first cycle of reflection, the researchers formed four teams and engaged in inquiry with different groups of participants at their institution, including: (a) students, alumni, and faculty in an online Master's degree program; (b) college of education deans; (c) adult education faculty; and (d) Master's degree students. Following this round of inquiry, the researchers then engaged in a second round of debriefing and first- and second-person reflection, analysis, and inquiry among themselves about the findings from the first round of inquiry during their institution's annual research symposium. During the symposium, student researchers engaged participants in a similar round of first- and second-person reflection and inquiry. After these simultaneous rounds of critical reflection and inquiry during the symposium, the researchers enacted a third round of reflection and inquiry that resulted in another round of inquiry at an adult and continuing education conference, where a small subset of the researchers presented the findings to participants and engaged them in a round of reflection and inquiry. Each round of inquiry was enacted using a reflective, participatory process that included first- and second-person critical reflection, dialogue, and inquiry, which led to increased capacities for inquiry at the personal, group, and organizational levels. Two of the groups of inquirers revised their assumptions and experienced perspective shifts. The authors maintained that CDAI created conditions for transformative learning for both the researchers and participants, who were able to revise their current assumptions toward new conceptualizations of adult education.

In summary, there appears to be support for the assertion that CDAI is a useful approach for the evolution of consciousness. Each of the empirical studies presented here demonstrate the flexibility of the CDAI approach through their diverse enactment of it.

They also demonstrate CDAI's potential to foster shifts and transformations in researchers and study participants. However, all of the empirical studies of CDAI took place within formal organizational or educational settings. Additionally, although they all sought to foster some form of learning and transformation, none of them was explicitly developmentally focused. Given that the empirical literature around CDAI is limited and nascent, and that few use an action-oriented rather than an observational approach (Banerjee, 2013; Miller, 2012; Nicolaides & Dzubinski, 2015), this inquiry addressed an important gap in the literature. Specifically, this inquiry provided an illustration of how consciousness becomes more complex, of the CDAI methodology in action, and of its facilitation of the development of more complex meaning-making capacities outside of a professional and educational setting. In the next chapter, I describe the study design and methods used to enact CDAI and this inquiry.

CHAPTER 3

METHODOLOGY

The purpose of this action research (AR) case study was to explore the experience and facilitation of the evolution of consciousness in adults using collaborative developmental action inquiry (CDAI) methodology. Specifically, I examined the following research questions:

1. Within the context of a CDAI group, what developmental supports and challenges facilitate the evolution of consciousness of women to more complex capacities and ways of knowing that allow for greater individual and social awareness and effectiveness?

2. How does the context of a CDAI group serve as an effective holding environment for the evolution of consciousness?

3. How does a CDAI group function as a system, and how does it develop collective capacity to evolve consciousness?

In the following chapter, I describe the research design and methodological approaches that were used to answer these questions. Specifically, I discuss the overall paradigmatic approaches used, the actions taken by the group over the course of the study, and the research methods employed to collect and analyze data for the study. As part of this discussion, I also address other key considerations related to the study, such as our use of technology.

It is important to disclose here that in this chapter I grapple with two aims. The first aim is to adequately describe the approach, design, and methods used in this inquiry. The second—infinitely slipperier and more challenging—is to convey the "behind-the-scenes" action and decisions—the muck and messiness—of this particular method and my enactment of it in a way that is both clear and transparent but not overwhelming and undisciplined. Indeed, Bridges-Rhoads and colleagues (2015) speak to the need for and usefulness of more methodological transparency within qualitative research, particularly those studies that fall outside of the positivist paradigm. However, they also complicate the notion of methodological transparency by examining the various decisions about what gets discussed and what gets left out in descriptions (particularly in dissertations) of how qualitative researchers collect, analyze, and present data. They describe the challenge and "politics" of revealing the messy and iterative nature of qualitative research and how researchers come to know what they know. At times, the descriptions of methodology and methods do not match the theoretical underpinnings of the research. Doing so often introduces constraints and complications for which there is limited guidance and models within the standards of traditional representations of data and research. I struggled with this challenge in the current chapter (and beyond) in many ways. How do I describe and best represent the simultaneous messiness and rigor of this inquiry as I enacted it? Similarly, how do I describe my twisting journey down the paths and frameworks that necessarily guided and structured my inquiry, followed by my eventual veering off of that road, my entanglements in briars and brush, and my ultimate discovery of Oz? These questions are not small considerations as they speak not only to the reproducibility of the study and claims around rigor and trustworthiness, but to the epistemological stance and

related representation of an inquiry using CDAI as the paradigmatic approach in the first place as well as the brand of knowledge it produces (and by what means). I can offer no definitive resolution to these concerns. However, as will become a refrain from this point forward, this dissertation is but one, limited representation of the entire landscape of this inquiry. My intention is to describe it as clearly, rigorously, and with as much integrity to the method as possible. My disclosure of the subjective, iterative, and shifting nature of the inquiry—and my related uncertainty and methodological choices—is part of that.

Research Approaches and Design

This inquiry was guided by multiple approaches and study designs, which encompass, overlap with, and inform each other. This study can be best described as an action research case study using collaborative developmental action inquiry as both an approach and method. I also utilized a post-qualitative research approach in the implementation of the research methods. The use of a radically-subjective, first-person voice to narrate the second-person story is fully congruent with the CDAI methodology, but rather resembles a type of autoethnography. Given the complexity and emergent nature of the study, all of these approaches and frameworks informed my design and implementation thinking and choices. In the next section, I provide overviews and descriptions of each approach before describing how I used them practically in the inquiry.

Action Research Overview

This inquiry utilized an AR approach overall. Action research is an umbrella term for a variety of research approaches that privilege change and action (Coghlan & Brannick, 2010; Reason & Bradbury, 2008). In order to enact change, AR is typically

conducted collaboratively between the researcher and community or organizational

stakeholders. In this way, the researcher is not distanced from the research context and

participants but rather endeavors to work with participants (as co-inquirers) toward

desired action and change. In addition to CDAI, other common types of AR include

collaborative inquiry (which is related to CDAI as described previously), community-

based participatory research, participatory action research, action science, appreciative

inquiry, and practitioner research, depending on the discipline or specific methods

employed. Because of the diversity of AR approaches and methodologies, there is wide

variability regarding the epistemological positionality of the AR researcher. Herr and

Anderson (2005) hold that AR exists along a continuum according to the level of

researcher embeddedness within the context and system, local stakeholder involvement in

the research, and the relationship or positions of power between the researcher and

participants, depending on the AR tradition. Specifically, AR researchers can be full

"insiders" or participants within the study context, conducting research on him or herself

on one end of the spectrum, or can be "outsiders" or external researchers studying others

within a particular context at the other end of the spectrum. Participants can function as

full co-inquirers or have peripheral involvement in the study design and implementation.

These epistemological choices necessarily impact how the research is conducted and the

knowledge it produces. Regardless of the specific type and form of AR, the following

key features are typically consistent in different degrees:

- AR is collaborative. Stakeholders in the research outcomes are involved from

  the beginning in shaping the focus, process, and activities of the project. As

  such, AR is never formulated by a researcher in isolation for the purpose of

answering a question primarily of interest to the researcher and his or her scholarly community using disinterested research "subjects." AR is formulated based on the mutual concerns of the researcher and stakeholders within the research setting or community.

- AR is focused on change. It is problem-focused and seeks to generate knowledge for the purpose of developing and applying solutions in real time that address current and future problems faced by individuals, practitioners, or communities. In this way, AR intervenes within a system or community to improve practice, outcomes, and/or effectiveness.

- AR is iterative and emergent. It occurs in multiple cycles of inquiry and intervention that involve variations of planning, acting, observing, and reflecting (Herr & Anderson, 2005). Through the process of moving through the multiple cycles of inquiry and action, "new questions, new literature, and new methods emerge" (Herr & Anderson, 2005, p. 71).

- AR is reflexive. Action researchers and stakeholders reflect on their behaviors, thoughts, and assumptions for deeper understanding about an issue and about their role in changing it. In addition to engaging in the AR cycles of problem-solving and enacting change, researchers and stakeholders reflect individually and collectively on the process of problem solving.

- AR seeks to contribute transferable knowledge. Specifically, action researchers seek to find and disseminate relevant and meaningful knowledge beyond the setting within which they are working in order to contribute to the larger pool of understanding.

In these ways, AR is distinct from traditional social science research, evaluation, everyday problem solving, and business consulting even as it may share similar information gathering and problem-solving methods (e.g., surveys, focus groups, team building, coaching, and strategic planning) with these various approaches.

Action research is typically carried out in iterative cycles of thinking, acting, and reflecting. Coghlan and Brannick (2010) detail a useful action cycle that involves four basic steps of constructing, planning action, taking action, and evaluating action. In the constructing stage, the researcher and stakeholders (or co-inquirers) co-determine through observation and dialogue what the issues are and establish a basic framework for action. In the planning action stage, the researcher and co-inquirers develop a plan of action and determine the best intervention based on their understanding of the issues and contextual factors. In the taking action phase, the plans and interventions are enacted. During the evaluating action phase, the researcher and co-inquirers examine the intentional and unintentional outcomes of their interventions to determine their effectiveness and inform the next action cycle (Coghlan & Brannick, 2010). Throughout these cycles, various quantitative and qualitative research methods used in traditional research approaches are often used.

In addition to enacting the action cycle of constructing, planning action, taking action, and evaluating action, the researcher and co-inquirers engage in a second meta-learning cycle, which involves constant reflection on the action cycle and process. In this way, the researcher and co-inquirers examine how the action research process is unfolding and what they are learning through the process. This reflection often occurs formally at the individual, interpersonal, and organizational or community level through

journaling and dialogue (or other methods appropriate for the context). The overall AR approach fits well within the collaborative, action and inquiry focus of this study, and CDAI was the type of AR that best suited the specific concern that we sought to address. Given the use of CDAI as the AR approach, this study was more congruent with the more insider approaches to AR. Specifically, my research participants served as co-inquirers as we explored a common concern that was mutually-relevant and interesting.

Collaborative Developmental Action Inquiry

This study utilized a CDAI design, which is both an approach and method of AR, in which a group of interested participants work collaboratively with the primary researcher as co-inquirers to explore the study topic, implement any facilitative interventions, and collect data on the outcomes of these interventions. Developed by Torbert (2004)**,** CDAI focuses on developing individuals' and organizations' ability to engage in simultaneous action and inquiry for greater awareness and effectiveness in the moment. Torbert (2013) describes CDAI as a "meta-paradigmatic approach of scientific inquiry that integrates first-person, adult spiritual inquiry and consciousness development in the emerging present with second-person, transformational mutuality-seeking social scientific inquiry over a lifetime, and third-person, intergenerational, objectivity-seeking social scientific inquiry and its effects" (p. 265). CDAI seeks to build capacity to triangulate between the subjective, inter-subjective, and objective aspects of real-time action and inquiry. In this way, it extends traditional social science paradigms which privilege and focus on objective or third-person, "after-the-fact" knowledge.

CDAI is a fairly complex approach heavily influenced by action science and constructive-developmental theory. Specifically, it incorporates and builds on action

science's considerations of second-person communication practices and parts of speech, and single-, double-, and triple-loop learning (Foster, 2012). As it relates to second-person communication practices or communicative action, Torbert (2004) extends action science's concepts of advocating and inquiring to include four parts of speech: framing, advocating, illustrating, and inquiring. Torbert suggests that one most effectively uses the four parts of speech sequentially. Framing describes the purpose for the communication and setting the context; advocating states an assertion or position; illustrating provides concrete details that support the advocacy; and inquiring involves questioning and inviting input from others. According to Torbert, incorporating these four parts of speech into one's communicative action is a second-person practice that allows for greater awareness and effectiveness through increased mutuality and the receipt of better and more accurate information from others. CDAI also extends action science's discussion of single- and double-loop learning to include triple-loop learning. Single-loop learning is the most basic form of learning and involves making connections between one's actions and the outcomes of those actions, and being able to identify and implement basic changes in action for different results as needed. Double-loop learning comprises a deeper level of learning whereby a person makes connections between his or her strategy or underlying approach for the purpose of understanding the cause of the outcomes generated by his or her actions. Triple-loop learning draws connections between one's deeper assumptions and ways of knowing and his or her strategy and actions. While all three levels of learning are necessary for different types of change, triple-loop learning is often considered a prerequisite for true and lasting transformation.

Additionally, CDAI makes use of constructive-developmental theory to consider adults' and organizations' progression through sequential stages of psychosocial development, or action logics, that both challenge and support their ability to engage in the timely and skillful action and inquiry that CDAI outlines. Specifically, Torbert (2004) details eight primary action logics, which are essentially epistemological frames or orders of consciousness that represent and inform the way a person knows and takes action in the world. Only seven are considered the most empirically present and relevant for most adults (Fisher, Rooke, & Torbert, 2003; Torbert & Associates, 2004). A person moves from earlier action logics to later ones over time as she or he develops more mental and emotional complexity. This movement represents what I (and others) alternately refer to as development, growth, evolution (in this context), or evolution of consciousness (Berger, 2012; Kegan, 1982, 1994; Torbert & Associates, 2004). From the least to the most complex, the seven action logics most relevant to and prevalent in adulthood (along with that action logic's focus of awareness and primary perspective) include: Opportunist (own needs and self-interest); Diplomat (social acceptance and belonging); Expert (internal craft logic rules, mastery, and rationality); Achiever (own personally important results, goals, and plans); Redefining (relativity, impact, and influence with others); Transforming (systems view, and process and goal oriented); Alchemist (transforming self and others, and interplay of awareness, thought, action, and effect) (Fisher, Rooke, & Torbert, 2003; Torbert & Associates, 2004). Table 2 builds on Table 1 (presented in Chapter 2) by illustrating how Torbert's (2004) and Kegan's (1982, 1994) frameworks overlap and relate to each other. I use the various terms interchangeably where relevant and appropriate.

Table 2

Comparison of Kegan's and Torbert's Constructive-Developmental Frameworks

Framework	Dependent / Socialized Mind		Independent / Self-Authoring Mind		Inter-independent/Self-Transforming Mind	
1) Kegan's Orders of Consciousness	*Interpersonal / Traditional / 3rd Order*		*Institutional / Modern / 4th Order*		*Inter-individual / Post-Modern / 5th Order*	
What is object?	Enduring needs and dispositions		Interpersonal relationships		The autonomous self	
What is subject?	Interpersonal relationships		The autonomous self		The transforming self	
2) Torbert's Action Logics	*Diplomat*	*Expert*	*Achiever*	*Redefining*	*Transforming*	*Alchemist*
Action logic	Norms rule needs	Craft logic rules norms	System effectiveness rules craft logic	Relativism rules single system	Most valuable principles rule relativism	Deep processes and inter-systemic evolution rule principles
Main focus	Socially expected behavior, approval	Expertise, procedure, efficiency	Delivery of results, effectiveness, success within system	Self in relationship to system; interaction within system	Linking theory and principles with practice, dynamic systems interactions	Interplay of awareness, thought, action, and effects; transforming self and others

Note. Adapted from Brown (2012) and McCauley et al. (2006)

CDAI is both action-oriented and developmentally focused for the purpose of facilitating timely and effective inquiry into and action around a situation from multiple levels and perspectives. This process necessarily involves and requires increased levels of awareness and more complex meaning-making capacity—hence CDAI's developmental focus. Specifically, CDAI describes four territories of experience that an individual and group has access to and can be aware of in any given moment (Torbert & Associates, 2004). These include one's intentions or purposes, one's plans or strategies, one's behaviors or actions, and the third-person outcomes that occur as a result of these.

Increased attention to and awareness of these four territories of experience—a key first-person practice in CDAI—signals development and makes timely, more effective action and inquiry more possible and likely. As mentioned earlier, in this study, our group process, choice of interventions, and data collection and analysis strategy were influenced by the overall CDAI approach and method. Specifically, considerations of first-, second-, and third-person research and practice influenced my choices and decisions throughout the inquiry. I also privileged an extremely emergent design beyond more traditional forms of AR given CDAI's flexibility of method and its focus on action and inquiry in the moment. Furthermore, as the convener, primary researcher, and participant in the study, my first-person perspective and observations were crucial features of the second-person inquiry and story. This positionality necessarily impacted the conduct of the study, as well as the representation of it, which included significant autobiographical data. My use of a radically subjective, first-person voice and of autobiographical data was consistent with CDAI and, more specifically, this type of inquiry, which was taken up as part of a personal concern. However, it was also consistent with AR. Herr and Anderson (2005) write:

> Action research is characterized by its use of autobiographical data. If, for example, the research question is about their own professional practice or personal experience, researchers are clearly required to study themselves (Tenni, Smith, & Boucher, 2003) or, if a researcher is the facilitator or instigator of a change process, part of the research documentation is the researcher's roles, actions, and decisions. (p. 77)

In keeping with the intent of a personally grounded, subjective inquiry rooted in CDAI's considerations of first-, second-, and third-person research and practice, this inquiry is presented as a first-person narrative of second-person research and its third-person impact or outcomes.

Case Study Design

Case study research is a particular type of social science research that "investigates a contemporary phenomenon (the 'case') in its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident" (Yin, 2014, p. 2). A case study can utilize single or multiple cases (or smaller cases embedded within one large case) and can feature a variety of evidence types and sources similar to other forms of social science research (Yin, 2014). Case studies are versatile in the types of questions they can answer. They can be used descriptively or explanatorily. They can also be used to test or build theory, or as an open exploration into a topic. As a case study, this inquiry was both exploratory and descriptive (Yin, 2014) as it sought to examine and describe the phenomenon of consciousness as it reveals itself and evolves (potentially) in the context of a CDAI group. Specifically, while this inquiry was informed by Kegan's (1982, 1994) constructive developmental theory and Torbert's (2004) collaborative developmental action inquiry methodology, it was not necessarily a "test" of these theories and methods as much as it was an exploration and description of a particular enactment of these frameworks, which served as theoretical and methodological guides. This inquiry functioned as an embedded case study, with the primary case and unit of analysis being the group (or second-person level) and each member of the group serving as her own case (or first-person level) unit of analysis

within that. While I collected data at all levels, during my analysis I chose to privilege the larger, primary case (or the group).

Although I considered the unit of analysis of this case explicitly for the purposes of "bounding" the inquiry—particularly given the multiple levels enacted—the case study design only loosely guided my conceptualization of the study. Namely, this was a case study precisely because it functioned as a case study—"investigating a phenomenon in its real world context," from which it cannot be separated. More specifically, it offers a practical illustration of CDAI in action. However, beyond this issue of a "bounded" context that cannot be separated from the phenomenon under exploration, this inquiry was structured more explicitly around its CDAI approach rather than a typical case study. Additionally, given the complexity of the study and its approach, which privileges simultaneous action and inquiry based on what is arising in the moment, I necessarily tried to remain aware of and open to various strategies and methods to meet the shifting needs of the inquiry. This led me to my unlikely discovery and use of a post-qualitative research approach.

Post-Qualitative Research

Post-qualitative research is the critical, raucous, and rule-breaking cousin of qualitative research. Like all of the other "posts" (post-modernism, post-positivism, etc.), post-qualitative research boldly argues that there is no standard methodological truth or "gold standard" to adhere to in conducting research, especially qualitative research (Lather, 2013; Lather & St. Pierre, 2013). Rather, it asserts that qualitative research and method are messy and emergent, and should be guided primarily by the needs of the particular inquiry, its underlying theory and approach, and what the researcher discovers

"in the trenches." Lather (2013) and St. Pierre (2014) trace the history and development of qualitative research and method and the emergence of post-qualitative research, outlining: (a) Qual 1.0—conventional interpretive inquiry that stems from humanistic sociology and anthropology, privileging the subject's authentic voice and rich descriptions of lived experience that are closer to the truth than mere quantification of experience; (b) Qual 2.0—a slight departure from conventional interpretive inquiry that acknowledges messy texts, dialogue, and reflexivity but that eventually becomes "centered, disciplined, regulated, and normalized" (Lather, 2013, p. 635) through qualitative textbooks, journals, and courses that make qualitative research designs and processes knowable and teachable in advance; (c) Qual 3.0—employs post-modern theories and other critical epistemologies (e.g., feminist theories, race theories, etc.) to expand the field; however, it becomes bogged down in defenses and justifications of qualitative methods and their related epistemologies before returning to a structured and normalized "interpretive mixed methods" (Lather, 2013, p. 635); and finally, (d) Qual 4.0—a method still in the process of "becoming," after the previous movements of qualitative research. Qual 4.0 is what is generally thought of as post-qualitative research. Lather (2013) succinctly and poignantly describes the gestalt and emergent nature of this qualitative "turn" as the result of:

> researchers who, weary of a decade of defending qualitative research and eager to get on with their work, again imagine and accomplish an inquiry that might produce different knowledge and produce knowledge differently. This inquiry cannot be tidily described in textbooks or handbooks. There is no methodological

instrumentality to be unproblematically learned. In this methodology-to-come, we begin to do it differently wherever we are in our projects. (p. 635)

In the course of conducting this inquiry, I quite unintentionally began using a post-qualitative research approach. Despite having taken multiple research methods classes during my masters and doctoral training (which included both quantitative and qualitative methodology from different disciplinary perspectives) and having previously conducted both quantitative and qualitative studies, I found myself significantly out-tasked by the complexity of this inquiry. Specifically, I was drowning in interesting but "odd" data with which I did not know what to do. Also, given the intensely subjective and intersubjective nature of the research, I found myself triggered by my study and co-inquirers at different points and deeply immersed in the "action" of the study in ways for which I was completely unprepared. Finally, despite my attempts to remain in control, maintaining the slight distance or detachment necessary for disciplined inquiry as suggested in most of my methodological texts, I found that I was neither solely in control nor distanced. Ironically, I found myself needing to alter or develop "new" ways of enacting traditional methods in order to maintain the rigor and integrity of the research. It required a much deeper engagement with my inquiry and a different level of daring as I determined when and how to alter methods to best suit the inquiry's purpose—sometimes in the moment. Practically, it involved enacting a different type of interviewing technique and analysis approach than what I had been trained in, for example (described in more detail later). In many ways, my conduct of (or methodological approach to) this research became an action inquiry. This is a significant point. In fact, I was enacting what I believe to be the true intent of the CDAI approach, but whose research methods

have not been explicitly elucidated. The question then becomes, how does one fully enact attention to one's purposes, strategies, behaviors, and outcomes across first-, second-, and third-person practice and inquiry in the moment? Additionally, I was functioning in the multiple roles of convener, facilitator, and co-inquirer. This necessarily placed me in tricky territory, requiring both single- and double-loop learning at various moments. St. Pierre (2014), who writes about and has taught post-qualitative research to doctoral students for over a decade, describes the challenge of conducting post-qualitative research which often has no clear guides. She identifies the necessary "overturn" of conventional (circa 1990s, or what Lather [2013] calls Qual 1.0) humanist qualitative methodology, which exhibits a latent positivistic form of knowledge production and often treats words like numbers, as "brute data" (St. Pierre, 2014, p.10) in a bid for legitimacy. She further asserts the need to align epistemology, ontology, and methodology within a study such that the underlying assumptions, theory, and knowledge claims made by the study align with the research design and methodology. This often results in a post-qualitative "mangling" (Greene, 2013) of practices that are emergent based on a thorough understanding of theory and deep engagement with one's research and data but better meet and represent the study's purposes. St. Pierre (2014) poignantly describes how she instructs her doctoral students in post-qualitative research, having found limited examples in the literature and relatively little guidance in qualitative methodology textbooks:

> I advise my students to actually *use* the "post" analyses that have been available
>
> for over sixty years. I encourage them to try to forget humanist qualitative
>
> methodology and *begin with the epistemological and ontological commitments of*
>
> *the analysis*—e.g., Derrida's deconstruction, Foucault's power-knowledge

reading—and use it to think about whatever they're interested in thinking about—

dropouts, the Common Core Curriculum, reading. I assure them that if they've

studied the theory carefully their "methodology" will follow…. Of course, there's

no recipe, no textbook that explains, step-by-step, how to "do" a Foucaultian

power-knowledge reading or genealogy; there's no "research design" or "research

process" for how to "do" Derridean deconstruction. To use those analyses, one

must read and wrestle with texts written by Foucault and Derrida that may, at

first, seem too hard to read and with ideas that may upend one's world so that

"thinking is living at a higher degree, at a faster pace, in a multidirectionary

manner" (Braidotti, 1994, p. 167) that certainly can't be captured in advance of

the study in a research proposal or a timeline. If one tries to reduce those analyses

to recipe, process, and systematicity, the magic of inquiry can become what

MacLure (2013) called "lumpen empiricism." Further, using those analyses is, I

believe, much more difficult than interviewing six to eight people and then,

attending neither to epistemology nor ontology, coding the interview transcripts

and watching "themes" somehow miraculously "emerge." (St. Pierre, 2014, pp.

10-11)

This statement speaks to the fact that post-qualitative research is not comprised of any

one set of specific methodological practices, but rather a more complex, attentive, and

creative convergence between epistemology and method. While not necessarily limited

to first- and second-person research, what St. Pierre describes is a process and method

that very much resembles CDAI and supports and promotes an extended epistemology

(Heron, 1996). This was the broad methodological approach that I unintentionally

utilized in this study. While I may not have set out to use a post-qualitative approach, my

process very much mirrored the one that St. Pierre describes. At any given point, my

methods necessarily shifted to fit the intent of the collaborative, radically subjective and

intersubjective nature of the inquiry. In effect, this represented my own double-loop

learning throughout this inquiry. Specifically, my use of post-qualitative research

methods in this inquiry was manifested primarily in my emergent and sometimes

improvisational "troubling" and "mangling" of traditional qualitative research methods

(e.g., interviewing, coding and theme development, etc.), which again is very much

congruent with AR and CDAI epistemologies and approaches. It was also manifested in

my use of a radically subjective and interpretive voice rooted in my being-ness or

ontology as the convener and participant/researcher. In this way, I attempted to connect

epistemology, ontology, and methodology as St. Pierre (2014) instructs.

Autoethnography

    While this inquiry was primarily informed by AR and CDAI, it exhibited

elements of autoethnography, which may be more familiar to some than CDAI.

Autoethnography comprises various types of studies that involve the researcher studying

herself or himself within her or his own culture (Patton, 2002). Here, "culture" can also

be extended to include one's organizational context, community, etc. Patton (2002)

describes autoethnography as "an autobiographical genre of writing and research that

displays multiple layers of consciousness, connecting the personal to the cultural" (p. 85).

The extent to which autoethnographers privilege themselves in their analysis, maintain

their social scientist positionality, and write subjectively varies significantly. However,

the primary distinguishing feature of an autoethnography is the level of self-awareness of

the researcher and her or his subsequent use and reporting of her or his personal
experience. Autoethnography also often blends science and art, which can be
controversial in the social sciences, particularly within more positivistic paradigms
(Patton, 2002). My use of a narrative first-person voice; inclusion of my first-person
experiences and insights as part of the inquiry and analysis; use of an interpretive analysis
process; and creative and narrative presentation of participant data were consistent with
autoethnography. Certainly, one of the criteria I used in judging the quality of this
document was its aesthetic merit, which is considered one of five criteria of quality for
autoethnographic research (Patton, 2002). This inquiry departed from a strictly
autoethnographic approach, however, in that it also privileged the second-person,
intersubjective space, which was the unit of my analysis. Furthermore, I remain steadfast
in my assertion that my choices around positionality and presentation were congruent
with and emblematic of the CDAI paradigmatic approach and method.

With this design and methodological grounding established, in the next sections I
detail the actual methods of the study. First, I introduce my co-inquirers[6], whom I "flesh
out" over the course of the next two chapters.

Co-Inquirers

Selection and Engagement

The participants in this study consisted of seven women, including myself.
Because of the nature and methodology of this study, we held multiple roles as co-
inquirers (researchers and members of the CDAI group) and co-participants. Members
were recruited using the purposive sampling methods common in qualitative research

---

[6] As mentioned in Chapter 1, I refer to participants alternately as co-inquirers (as I did during the group) or as group members.

(Creswell, 2009). Specifically, I utilized snowball and network sampling whereby I identified and approached potentially eligible women from my personal network who would be interested in participating in this type of study, and then participants (and others) also identified potentially eligible and interested women from their networks. Once I decided to embark upon this first-person research, which grew out of an intense and deeply personal journaling process and concern, I contacted three other women—close friends of mine—who were also experiencing similar challenges as me and who would likely be interested in taking this journey with me. I discussed my idea with them, and they immediately expressed interest in participating. This particular approach of inquiring with friends and close others is very much congruent with CDAI, which describes the practice of forming "triangular friendships" in which a trio of friends or close associates intentionally and explicitly commit to ongoing mutual transformation (Fisher, Rooke, & Torbert, 2003). However, in keeping with suggested collaborative inquiry guidelines for a robust and effective group of this sort, I determined that six to eight women would be engaged and recruited into the group (Heron & Reason, 2006). This number would allow for a diversity of experiences and perspectives, while also being a manageable size for facilitation and sharing. Given this preference for six to eight group members, I needed to branch out and engage at least two additional women beyond the initial group of four comprising my closest friends and me.

The study received institutional review board (IRB) approval in July 2013. After that, I formally began recruiting additional members. Initially, I asked the existing members if they knew any other women who would be interested in and appropriate for the group. Only one of the group members could think of one other woman, who turned

out to not be interested. I then determined that I would need to recruit women from

multiple sources. Toward this end, I created a brief flyer advertising the study for

distribution via various listservs to which I had access and social media sites (such as

Facebook). I also created a longer, two-page invitation letter with more background and

information about the study (see Appendix B). This letter was a personally descriptive,

intimate introduction to the study, framed to emotionally engage participants who were

personally interested in and connected to the research. This was particularly important

given that the participants would be co-researchers who needed to have a personal stake

in the topic and concern. My plan was to send the letter to potentially interested women

as a precursor to a discussion and telephone eligibility screening process to ensure that

there was good "fit" for the group. I was looking specifically for women who were at

least 30 years old, self-identified as women of color, had access to the technological

resources needed for the study (e.g., a computer with internet access and video

conferencing capabilities), felt like they were in the midst of a personal transformation or

evolution of consciousness, were willing to commit the time and energy to exploring the

topic with a group of other women for a period of 10-12 months, and who were willing to

pay for a developmental assessment ($125). Once this process was over and a potential

member agreed to join the CDAI group, the plan was to ask her to sign and return a

consent form and a memorandum of understanding (MOU) (see Appendix C) outlining

the study focus and general group expectations.

A slight departure from my original plan, all of the women beyond the initial

group were identified and recruited through word of mouth. In most cases, potential

group members received a copy of the flyer, invitation letter, and MOU through email,

either from me or someone else who thought that they would be interested and a good fit.

In one member's case, she and I met at a workshop months before recruitment started.

As planned, each woman received the MOU and consent form to read over and to

facilitate a longer discussion between her and me about the group, her interest and

potential "fit" or eligibility, and to answer any questions she might have before agreeing

to join. In most cases, these discussions went smoothly, as women expressed excitement

about the group and their desire to meet with other like-minded women to discuss and

consider these issues. Most of their questions centered on the time commitment, the

structure of the group and meetings, and the content of meetings. In total, 11 women

were introduced to the study by me or someone who knew them. I had a conversation, via

phone or email, with eight of these women about the study. Five of the eleven women

decided not to join the group, mostly because of the time commitment. One woman had

concerns about the action research approach and the requirement that group members pay

for any assessments and interventions administered as part of the group. In the end, we

ended up with seven women in the group.

Co-Inquirer/Member Demographics

Table 3 provides a snapshot of member demographic profiles. More descriptive

narrative profiles are offered in Chapter 4.

Table 3

Member Demographic Profiles

Name (Pseudonyms)	Age	Race	Location	Profession	Action Logic
Mimi	39	Black	Mozambique	International health development administrator	Early Redefining
Lily	40	Black	Pennsylvania	School psychologist	Late Achiever
Rose	33	Bi-racial (Black/White)	Mozambique	Entrepreneur	Achiever
Danielle	37	Black	Georgia	Physician	Redefining
Jessie	50	Asian	Georgia	Project manager/engineer	Early Redefining
Ruth	40	Black	Pennsylvania	Doctoral student	Achiever
Shakiyla (me)	40	Black	Georgia	Public health practitioner and research administrator	Late Redefining

Context

Given its personal nature, this inquiry did not take place within a formal system but rather within the shared context of seven women of color's experiences of and inquiries around their challenges in meeting the demands of adulthood and their evolutions of consciousness to better meet these demands. Specifically, it took place within the context of a virtual CDAI group (Torbert & Associates, 2004). In this way, the context or "site" of this inquiry was multi-layered—both within the subjective, first-person perspective and experience of each group member and within the intersubjective, second-person functioning and experience of the group itself. As such, one could say that there were, in effect, eight "sites" or contexts—representing the seven group participants

and the group itself or the relationship between them—each with its own history, territory of experience, and evolutionary trajectory. This relates to the embedded case design described earlier as each woman served as her own case, embedded within the larger case of the group.   More specifically, I was concerned about and paid attention to (a) my own and each co-inquirer's first-person or individual experience within and outside of the group; (b) our second-person experience within the functioning and structure of the group, or rather the texture and quality of our collective interactions; and (c) the third-person impacts that our first- and second-person experiences had in each of our life worlds or external environments. All of these levels of inquiry were important and we captured our experience at each of these levels.

Technology Structures

In discussing the design, process, and functioning of the group, it is important to raise the issue of technology since it was an important feature and aspect of the group's work. Because group members lived in different locations around the world, the group was conducted using Adobe Connect video conferencing. We relied on the technology to facilitate the content of the group as well as its interpersonal aspects. While the Adobe Connect platform was generally accepted by all members of the group and allowed for flexibility of use, there were significant challenges with the technology. Specifically, there were recording losses and problems with recording quality due to issues with Adobe's recording format and playback function. This was particularly problematic from a research perspective and jeopardized the integrity of our data, as some of our earlier meetings were not transcribed accurately or completely due to poor recording quality, requiring significant effort to salvage. Additionally, due to sporadic connectivity

problems experienced by individual members before and during meetings, meetings typically started 15 minutes behind schedule, shortening crucial time together. While I usually began opening the meetings at least 10 minutes in advance and invited participants to join early to account for any technological glitches, we continued to struggle with this for a while. To address these issues, I asked members to use an Adobe-integrated conference line that I secured for the audio portion as a default rather than the option of using the computer's voice and audio functions. This helped significantly. I also started using this conference line for the primary meeting recordings because it was more stable than the Adobe recording function (although I continued to record the video and audio of the meeting through Adobe).

Of most concern to me was the interpersonal distance created by the technology. Because of the nature of the group and our work together, I believe that the video conferencing format created an emotional distance among members, especially since most of them did not know each other outside of the group. A couple of the members voiced this concern explicitly or expressed a desire to meet in person. Furthermore, some of the very personal interventions that we engaged in likely would have worked better in person. Specifically, this was my experience of our U-journaling activity (described later). I had done this particular exercise on two previous occasions, once alone and once with another person face-to-face. My experience of it in the group felt very different. Though I did facilitate the exercise while also trying to participate (which partially accounted for the difference in my experience), its power, in some ways, felt lost in translation nevertheless.

Certainly, the virtual aspects provided a comfortable distance for some group members, particularly those with social anxieties, as we usually kept our screens frozen when we were not the speaker to preserve bandwidth and reduce connectivity issues. Indeed, Lily, who suffered an anxiety attack during a meeting (discussed in Chapters 4 and 5), was able to leave the group unnoticed while she collected herself because her screen was frozen. Personally, I was quite frustrated with and ambivalent about the technology; I struggled with it immensely both as the facilitator and primary convener and researcher. Not only did it complicate our ability to connect and develop relationships with each other, but behind the scenes, it was expensive, and it was difficult to get technological support to resolve glitches or issues that arose. At times, I rued the decision to conduct the group virtually and felt that I would have preferred an in-person group, which may have improved group bonding and allowed for other intervention options (e.g., the use of movement, other artistic forms, etc.). However, given the current prolific use of social media, video conferencing, and other virtual technologies to bring together like-minded people around the globe, this group structure held much promise. Further, this experience in itself, while not directly part of the inquiry, provided useful data in regards to facilitating these types of virtual groups.

Methods

In the following section, I discuss the methods used as part of this inquiry. Specifically, I describe the methods used by the group to enact CDAI. These include the various activities and facilitative actions that we used as part of our explorations into consciousness. Of particular note, I offer these here and in detail—an explicit departure from more traditional methods chapters—as part of my intention to elucidate the CDAI

method in-action and as this study's unique contribution to the literature. Following that,

I describe the methods used as part of the larger inquiry of the study. For the sake of

organization and structure, I separate these two pieces of the overall work—that is, the

action inquiry "minor" of the group, and the action inquiry "major" (or meta-action

inquiry) of the entire study.

Action Inquiry Minor

      Activities and intervention(s). CDAI seeks to facilitate more effective,

simultaneous action and inquiry in the moment. It accomplishes this primarily through

two mechanisms, which could be ends themselves: the development of greater mutuality

between people and groups that allows for more open and honest information sharing,

and the development of more complex meaning-making capacity and greater personal

awareness that encompasses multiple levels of awareness and increases one's ability to

give, receive, and act on single-, double-, and triple-loop feedback (Fisher, Rooke, &

Torbert; 2003; Foster, 2012; Torbert & Associates, 2004). Rather than offering a set of

prescriptive practices and interventions for accomplishing these goals, however, CDAI

offers an approach and a set of tools that promote first-, second-, and third-person inquiry

and practice. The following section describes the activities and specific interventions or

facilitative actions that we took as part of our developmental work. As the convener and

facilitator of the group, I decided on the initial meeting structure, content, and activities

using CDAI as a guiding framework (described in Chapter 4). However, as part of

facilitating a collaborative process and developing mutuality, all "formal" interventions

were chosen collectively based on our individual and shared interests and goals.

Specifically, I tried to suggest and include activities and processes for consideration that

(a) addressed first-, second-, and third-person inquiry and practice; (b) included the four territories of experience; and (c) would help facilitate and develop increased reflection and awareness, and expanded meaning-making capacity. Additionally, to move beyond the purely cognitive level, I considered and suggested options that encompassed collaborative inquiry's extended epistemology or four distinct ways of knowing (described more in Chapter 2) where feasible—experiential, presentational, propositional, and practical knowing (Heron & Reason, 2006). Finally, through our discussions and prior work together, it was important to include activities that explicitly addressed our individual "stuckness" or change resistance.

Possible interventions were listed and sent to the group via the email listserv for consideration, along with simple descriptions and related literature or materials explaining the intervention (where available and appropriate). Some of these were augmented slightly to incorporate group member suggestions and preferences. Early on, group members were also provided with a clear and concise published article (Foster, 2012) about the CDAI method and were offered the opportunity to suggest potential interventions that fell within the larger structure and/or intention of CDAI concepts and approach.

Before I describe the activities and interventions, it is important to note that this description may give the impression that there was a lot of activity in the group. In fact, many of these interventions and activities—particularly the ongoing practices—were woven almost seamlessly into our functioning and structures. Indeed, as I discuss in upcoming chapters, one member felt that we were not engaging in enough activity and were spending too much time in reflection and dialogue. As mentioned earlier, the

activities and interventions are listed and described explicitly as part of my intention to illustrate the enactment of the CDAI method and as part of the methodological transparency described earlier. Specifically, my intention is to make clear and explicit those key aspects of the group and the inquiry that are available for description for future research and practice. Furthermore, they were selected and enacted as part of fully engaging the first-, second-, and third-person practices and inquiry of CDAI.

Group process. We held once or twice monthly, two-hour virtual meetings for a total of 12 months (more detail is provided in Chapter 4). Congruent with CDAI, we alternated between inquiry and action. Meetings were structured to include mindfulness practices (e.g., meditation and centering exercises), dialogue and sharing, intentional developmental practices or interventions, and group reflection. During the initial phase of convening and inquiry, most of our work centered on getting to know each other and better defining and understanding the shared concern and group focus. Then the group began moving into a formal action/intervention phase, with reflection on individual and collective experience and meaning-making around the group. These actions fell into two categories: intentional, formally chosen intervention activities and ongoing activities conducted for some other purpose that also served as a type of intervention to increase member awareness and meaning-making capacity.

The ongoing developmental activities included an in-group centering practice and member journaling between meetings. The four formal interventions included: an action logic self-assessment, a U-journaling process, a personal 360 assessment, and a 3-2-1 shadow process.

Ongoing activities. The following activities were part of our regular functioning and were not explicitly presented or labeled as "interventions." They were selected by me as the convener as part of enacting the CDAI method.

Centering practice. At the beginning of each group meeting, after our check-in, I lead the group in a short mindfulness or centering practice. I chose this practice, and sought the permission of the group to conduct it, to help develop mindfulness (or the ability to focus one's attention), which is an important feature of the expansion of one's awareness. Indeed, Torbert (2004, 2008) talks about meditation and mindfulness practices as key first-person practices for developing one's scope and quality of awareness. I have also found this to be true in my experience as a longtime yoga and meditation practitioner. This activity, in fact, served dual purposes. Not only was it an excellent first-person practice to facilitate the expansion of awareness, but it was an apropos way to open the group and bring members into the present moment. Because I am a trained and experienced yoga and meditation instructor, I was able to facilitate this activity for the group easily. I did, however, ask other members to suggest and consider leading other types of mindfulness activities. However, no one volunteered to do this. I usually collected data on group member reactions to the practice immediately following the practice during the meeting. Based on feedback, most members found it helpful. A few also described difficulty with focusing their thoughts, which is not uncommon even for experienced meditators. At the beginning, Ruth shared with me privately that she felt uncomfortable during one of the meditations because I used an Eastern term/concept (e.g., third eye) that conflicted with her Christian beliefs. She said that she simply began meditating on Christ so as to still be participatory, but she felt that I should be aware that

she had done that. I thanked her for her feedback and asked her to share these types of

insights in the group as other members may have shared her experience. This was good

feedback for me as I had inadvertently used this language (and merely used the term as a

locator for where I wanted members to focus their attention as we conducted a total body

scan), and this prompted me to use very value-neutral and non-faith-based centering

practices moving forward.

     Journaling. This activity served dual purposes. First, it was meant to serve as a

data collection tool to document member' experiences both within the group and in their

lives. It was also a reflective and reflexivity practice. As I considered first-person

inquiry practices that would be useful for group members to develop their reflection skills

while also chronicling their experience within and outside of the group, journaling

featured high on the list. Specifically, group members were asked to journal about their

first-, second-, and third-person experiences and reflections within and outside of the

group. I suggested a private online journal platform (Penzu.com) that allowed members

to do this while also easily sharing their reflections with me (and the group, if they

wanted). I also asked them to keep a journal either online or otherwise throughout the

study, which they would share with me periodically. Members had different experiences

with and took different approaches to this activity. Specifically, Jessie regularly and

randomly shared her journal entries with me using the Penzu journal. Another member,

Danielle, who typically journaled regularly on her own, found it difficult to journal

electronically and decided to buy a hardcopy book for her group journaling. Still other

members did not regularly journal and found it a difficult practice to develop. We

brainstormed around various solutions, such as recorded journals or short recorded conversations with me; however none of these worked very well.

Formal interventions.   In addition to the ongoing activities just described, we conducted the following formal interventions. As mentioned, the group identified and chose these (with one exception) as our formal facilitative actions to peer into and evolve our consciousness.

Action logic self-assessment. This activity was not formally chosen by the group; however, it best fits into the category of a formal intervention and one-time activity. In the early phases of the group, we completed and discussed self-assessments of our current action logic, which are provided by Action Inquiry Associates to individuals after they complete and submit the Global Leadership Profile (GLP) for scoring. The self-assessments are meant to facilitate consideration of and reflection on one's current, emergent, and fallback action logics in preparation for receiving one's actual assessment and feedback report. We each received one after turning in our GLP responses for scoring. During the second meeting, we began a robust discussion of constructive-developmental theory (CDT) and our thoughts about our current stage or action logic, which we continued online. Some members found it difficult to assess themselves at one action logic; rather, they felt that they used different action logics in different areas of their lives. Additionally, many of us identified more than one fallback action logic that we used during times of stress or ambiguity. Admittedly, assessing one's or someone else's action logic is not an easy task and usually requires special training and/or deep knowledge and experience with the concepts. In doing this activity, my purpose was to further expose members to the concept of CDT and also use these assessments as a

springboard for more intentional work together later in the group process around our

meaning-making capacities.

     U-journaling practice. U-journaling is a first-person practice whereby one

journals the answers to a series of 17 questions designed to help one access deeper levels

of awareness (specifically, self-knowledge) and develop practical ideas for creating a

desired emerging future (Scharmer, 2009). It is part of Theory U, a "social technology of

transformational change" (Scharmer, 2006, p. 4) that provides a theory and a process for

undergoing individual and collective change and innovation. I suggested this practice as a

complement to the similar but more external personal 360 assessment intervention that

we conducted (described later). I also thought it might be a useful first-person practice

for the group as members expressed a desire in earlier sessions to uncover their deepest

desires and discover their callings. I presented information about the intervention and

asked the group to review and decide if we wanted to pair the practice with the personal

360 assessments. Once members agreed, we underwent a U-journaling practice as our

first, formal (and collectively chosen) intervention during our June 2014 meeting. I

facilitated the practice since I had gone through it and facilitated it informally once

before. I also participated in the exercise. Group members sent me their typed responses,

and I did a preliminary analysis of the responses to determine themes across participants.

I did this by collating all responses in one document, reading through the responses by

question and noting similarities and differences. I prepared a summary document of

findings and common themes, which I sent to group members prior to our July meeting in

preparation for debriefing and discussion, along with our personal 360 assessment results.

Similar to most meetings, members sent me their post-meeting reflections about the

activity and the meeting. During the following meeting, we discussed our individual experiences with the practice as well as the themes described in the summary document. Most members found the experience useful and validating, if not necessarily enlightening or transformative. Specifically, the exercise confirmed for members that they were on the right path and that there was a sense of hopefulness around the future, which is important to note, given members' usual frustrations with their "stuckness" and slow-moving developmental processes.

On a process note, most of the members commented that the exercise was longer than they expected (though I had posted the description and questions beforehand) and that it got physically tiring toward the end. For my part, as mentioned earlier, I found it difficult to facilitate and participate simultaneously. It was challenging to get to a deeper level of presencing while also facilitating.

Personal 360 assessment. Conducted in June 2014, the personal 360 assessment was suggested by Ruth, who had done it before on her own at a time when she had wanted to gain greater clarity and awareness about herself and opportunities for change and development. The assessment is a set of five open-ended questions, that we collectively developed, about the inquirer posed to a small group (3-7) of close others from various parts of the inquirer's life world who have different perspectives about her (see Appendix D). This assessment was meant to offer group members a third-person perspective about her strengths, areas for growth, and blind spots. It also seemed to be an ideal complement to the U-journaling process, which was more of a first-person exploration and awareness-raising exercise. Group members were immediately excited about it. Mimi said that she had goose bumps when it was first mentioned. I viewed this

as a significant coup and as an outcome of my efforts to transfer the locus of control and power away from me and increase mutuality within the group. Even with the group's excitement about the intervention, it took us over a month to implement this intervention, as we first went through several revisions of the original set of questions provided by the group member who suggested it. Several members also had concerns about who to choose as respondents since some of them felt that they did not have many people in their lives who knew them enough to provide accurate feedback about them. We also discussed what type of holding environment we needed to create in the group to support members around receiving potentially difficult feedback.

In implementing the assessment, we decided to conduct it via Survey Monkey, with me serving as the administrator so that respondents had full choice of anonymity, should they prefer it, and so that our responses were collated. Group members sent out an email request to their potential respondents along with the survey link and a completion deadline. Several of us assessed each other because we were close friends outside of the group. Once the responses came in, I collected each individual member's feedback (including mine) verbatim into one document, which was provided to that member for review prior to our July 2014 meeting. We discussed the feedback and process and our learning from it during the meeting.

As it turns out, receiving the feedback was not the difficult part, but rather a few members struggled during the implementation phase, specifically around choosing and requesting feedback from respondents. Lily, who experienced social anxiety and interpersonal connection challenges, could only choose from four people in her personal life, and none professionally, who knew her well enough to respond to the questions—her

mother, husband, best friend, and therapist. Her therapist opted out of the assessment as she was not appropriate. While three respondents turned out to be adequate for our purposes, this process further highlighted for her the lack of varied and intimate personal relationships in her life. Jessie, who also struggled to choose respondents because of her lack of close connections, used mostly people from her professional life who only knew her in a professional context since she tended to keep her personal and professional lives very separate. She described herself as "very private"; however, she did not disclose having any emotional difficulty with the exercise. Finally, Rose, who only had one response, became emotionally upset during our debriefing session/discussion about the activity, saying that she found it very difficult to even ask people for feedback. She connected this to similar issues she had more generally with reaching out to and staying connected with people in her life. She disclosed that this issue was very painful for her and something that she continuously struggled with despite being aware of it. In fact, her one respondent spoke in several places about her not staying in touch with her friends and family.

Regarding actual feedback, most of the members found it moving and touching to hear how highly the people in their lives thought of them. Mimi said that it made her feel loved to receive the feedback. She also said that the feedback about her developmental challenges was not surprising—a sentiment shared by the other members. She and others expressed frustration over still not being able to see progress around certain issues that have plagued them for years. As part of the discussion, which I facilitated during our July meeting, I asked the group to consider how we could use this information to move

forward and continue our development. At that moment, many of us were unaware exactly how to move forward, further exhibiting the overall challenge within the group.

   3-2-1 shadow process. As part of our exploration into our own consciousness, including our blind spots, we engaged in shadow work. Shadow work is designed to reveal unacknowledged or repressed aspects of one's psychological and emotional experience, or the "dark side of the psyche" (Wilber, Patten, Leonard, & Morelli, 2008, p. 42). In October 2014, the group practiced the 3-2-1 shadow process, which uses a structured process to identify and work with an aspect of the practitioner's shadow (Wilber, Patten, Leonard, & Morelli, 2008). The process can take anywhere from 15 to 60 minutes. It involves facing, engaging, and owning the emotions around a particularly challenging or triggering person or experience and uncovering how the person or experience represents an unacknowledged, rejected, or repressed part of oneself. I sent the group an electronic copy of the instructions. I also recorded the written instructions for us to use as guided activity and emailed the recording to the group. For all except one of us, this was our first time engaging in a structured shadow process. We all practiced the process on our own and debriefed our experience during the first November 2014 meeting. Most of us found the process unusual to manage cognitively as it involves some visualization. However, most of us found it useful and thought that it yielded new insights. Everyone expressed interest in trying the process again at a later time on our own, as well as with the group.

Action Inquiry Major

   In the next section, I describe the methods used to conduct the inquiry, specifically the data collection and analysis procedures.

Data collection. As mentioned earlier, the data collection methods for the study were heavily informed by the CDAI method. In order to adequately answer the research questions, we captured and recorded our experience at the first-, second-, and third-person levels. Specifically, the following data were collected:

Pre- and post-group individual reflexive and provocative "interviews" (first- and second-person). I conducted pre- and post-group individual reflexive and provocative "interviews" with members (see questions in Appendices A and F). I describe these as such because they actually were more like provocative conversations designed as semi-structured interviews for capturing an individual member's first-person experience of the challenge and concern that initially led her to the group (pre-group "interview"/ conversation), and her thoughts about and experience of the group and any evolution she experienced (pre-group "interview"/ conversation). Because of my professional experience conducting structured and semi-structured interviews with research participants, I felt confident in my ability to have conversations with members that aligned with and careened away from the questions, probing deeper in places and touching lightly in others to gather the needed information as the moment dictated. What I was unprepared for was the experience of conducting these intimate conversations with close friends and women with whom I was about to engage (or did engage in the case of the post-group conversations) in a deeply subjective and intersubjective co-inquiry and exploration. Because of the personal nature of the inquiry and my prior knowledge and comfort with most of the members, I was able to probe deeper into incomplete or surface responses, challenge contradictory statements, and assert my opinions and insights based on my own experience within the group and/or personal knowledge of the member for discussion. I did not interview members from a distanced, dispassionate

position, probing to simply clarify an answer or invite a deeper response. We engaged in a mutual meaning-making process about their concerns, our experiences and perspectives, and the group. Not only did this approach yield more insightful information, but many members found the conversations illuminating and engaging.

These reflexive, provocative conversations marked my first utilization of a post-qualitative approach. I began enacting this technique in the moment to best meet the needs of our inquiry. Initially, I had concerns about the validity and ethics of inserting so much of myself into these conversations. I worried about not adhering to standards of rigor by influencing their responses. However, this felt like a more authentic approach to collaborative meaning-making with a co-inquirer as well as probing deeper into members' first-person experiences and understanding. This was more congruent with the intent of CDAI. Further connecting epistemology with methodology, as St. Pierre (2014) suggests, I addressed my concerns about rigor by combining any assertions I made during our conversations with inquiry and intentionally making space for more of each member's voice in the conversation. This also served as a type of validity checking as I was able to test my observations and assumptions with members in real-time at various points in the study process.

Individual self-assessments of current action logic (first-person). As described earlier, group members completed self-estimates of their current, emergent, and fallback action logics using a self-assessment document provided after they completed the GLP. The assessments were based on our own perceptions of our action logics according to the descriptions provided in the document. They were compared against the actual GLP results

and provided important information to consider as it relates to our own experience and understandings of our meaning-making.

Personal/journal reflections (first- and second-person). As mentioned above, these consisted of group members' and my particular reflections on our individual process and experience within and outside of the group, our reflections on the group process and development, and our experience of interventions. These were captured in writing (through emails and journal reflections). Specifically, group members agreed to keep journals about their life experiences. I left it open to members to decide the content of their journal entries; however, I also provided general prompts for members to reflect on and journal about upon request. While I recommended that members journal weekly, the frequency was their choice. In the end, only a couple of members journaled and sent their responses regularly. However, I had a total of 10, significant journal entries between Jessie and Lily, which provided invaluable triangulation of data and information about the group functioning from their perspectives.

Recordings and transcriptions of group meetings (first- and second-person). All group meetings were video and audio recorded, saved in video and MP3 formats, and transcribed for later analysis. Additionally, because all of the meetings included opportunities for members to reflect on the first- and second-person experience in the group, the meeting minutes contained particularly rich and useful data beyond merely capturing the activity of the group.

Post-meeting reflections (first- and second-person). After each group meeting, members provided reflections about their experience of the meeting and group process. I

sent a short series of post-meeting reflection questions via email (see Appendix E) to capture any triggers, new insights about ourselves or the group, and any other issues that arose.

Researcher memos (first-person). As the primary researcher and facilitator, I documented my own insights about my experience as well as the overall research process through recorded or electronically journaled researcher memos after meetings and as new insights arose. My recorded insights were transcribed for later analysis. These data not only captured any meta-learning that occurred, but also served as ongoing validity checks (discussed in more detail later).

Intervention products and materials (first-person). I collected and reviewed all intervention "products" and materials created by and for each member, such as U-journaling responses and personal 360 assessment feedback. While these were not specifically "analyzed," they informed my deeper understanding of our individual and collective concerns. I also used them to triangulate across other data sources.

Email and online exchanges (second-person). Most of our practical and relational communications occurred online and via email. These exchanges included mundane scheduling emails, reminders, meeting summaries, etc. They also included more substantive content, such as group member updates and requests for emotional support and feedback. I saved these in an email folder and transferred them to Word documents for analysis.

Global Leadership Profile (GLP) (third-person). The GLP is a validated 30-item sentence-completion test used to assess respondents' current action logic or order of consciousness (Rooke & Torbert, 2005; Torbert & Associates, 2004; Torbert, 2014). It was developed by Bill Torbert and based off of the Washington University Sentence Completion Test (WUSCT) (Torbert, 2014). It is meant to be self-administered and completed in an hour

or less. It is typically scored by two independent raters in order to classify the respondent

into one of eight action logics. Afterwards, a detailed report is provided to the respondent

that describes his or her current action logic or "center of gravity" action logic, emergent

action logic, and fallback action logic, with details about how the current action logic informs

the way he or she makes meaning and relates and interacts personally and professionally.

The report also provides information about ways in which the respondent may facilitate

development of his or her emergent action logic. Each group member took the GLP as a

third-person assessment as a condition of participation prior to the start of the group. We

agreed to not receive our scores until the conclusion of the group; however, we decided to

receive our scores before the group ended, along with a debriefing session and overview of

how to make sense of the information from an external facilitator. This decision was

discussed and made with the help of my mentors. Specifically, in the course of my

participation in another intentional community of practice and inquiry, my developmental

stage was tested and disclosed to me. I found this knowledge extremely useful and began

experimenting with actions that intentionally challenged my current action logic. This

knowledge helped me see the ways that my co-inquirers in this group could benefit from

knowing their action logics. Yet again, I was tinkering with my previously determined

methods to best meet the need of the emerging inquiry.

     External feedback and observations (third-person). This included gathering external

data through the personal 360 assessments. My initial design approach and plans were to

have us solicit external feedback and observations regularly at specific intervals throughout

the project from key, relevant others in our personal and/or professional life worlds through

more regular 360 assessments or accountability partnerships around specific change goals

and/or new action. However, as shall become clear in Chapter 4, the group developed into its own system and feedback loop that shifted our focus to the group as a practice site.

Data analysis. In the following section, I describe, as transparently as possible, the process I used to analyze and make meaning of the data collected as part of the inquiry, and of the overall inquiry itself. However, in full disclosure, this was where things became messy and a bit slippery, as most qualitative data analysis does—quiet as it is kept. The most one can do is describe the process by which he or she structured and applied rigor to the process. However, the analytic dance and interpretive footwork of gleaning meaning from words, feelings, and experiences is a bit like sending a fax— meaning, when I put my sheets of paper into the machine, it works, but I cannot quite see or explain how.

In the case of this inquiry, the use of a post-qualitative approach, which is most apparent in my data analysis process, further complicated matters. Specifically, I experienced a crisis of sorts in the course of my analysis when I realized that the favored and recommended method of coding and theme development would not work in my situation. Like a good, well-trained, but novice qualitative researcher, I had developed a detailed analysis plan and process and sent it to my advisor for review. I had even developed a list of provisional codes using my conceptual framework and research questions (Miles, Huberman, & Saldana, 2014). I had purchased my qualitative data analysis software (HyperResearch). I was ready to follow my plan. Then as I read through my data—one of the initial steps in my plan—I realized that I had too much data from varied sources that required a holistic consideration to reduce each discrete piece to codes and themes. It felt a bit like sending my data to humpty-dumpty's fate: How

would I put them back together again? How would I capture the complexity of my data and inquiry in a way that made any sense and maintained their integrity? Unfortunately, I did not know the answer nor did I know what else to do. I was essentially in methodological no-man's land with no food, no water, and no map. And no one was coming to save me. My initial response was denial. I entered my initial data (a couple of the post-group "interview" transcripts) into the software and started coding. That worked fine enough as these were data I recognized. Interviews were "light" qualitative data, and they were manageable since there were only six. I even told myself that I could simply delimit my analysis to the post-group "interview" transcripts alone – consulting the other data as necessary and relevant, which my advisor compassionately but promptly shut down. Once I went back to my other data and engaged my research questions, I knew I was really in trouble as all efforts to code and develop themes broke down completely. I spent weeks avoiding my analysis until in a conversation with my advisor I finally disclosed that coding was not working for me and that I was stuck. I sheepishly asked if I could forgo the coding process, and to my surprise she agreed, disclosing that she herself had used a different analysis method that included thick memoing and alternately working with theory. I seemed to have found the Land of Oz, which seemed to be a quietly kept secret.

With my advisor's blessing and initial guidance, I never looked back. In subsequent conversations with other researchers, I discovered an entire world of qualitative analysis that did not involve analysis through coding and theme development that no one seemed to be talking about and that was certainly not in any of the canonized textbooks, many of which I owned. It was then that I discovered post-qualitative

research, when a classmate sent me a special journal issue that featured an approach that reminded her of my descriptions of how I was analyzing my data. I nearly cried reading through those initial articles (Greene, 2013; Lather, 2013; Lather & St. Pierre, 2013). I wasn't just being lazy or overly complex. I had simply but unintentionally followed my already "unconventional" inquiry to its natural culmination—into the long tradition of complicated methodology. I was marrying the epistemology with the methodology of my approach and inquiry (St. Pierre, 2014).

Although I did not use coding in a traditional way, I did use a rigorous and systematic process, which was thoughtful and documented. I used coding more as an organizational and sorting feature, which is congruent with typical qualitative methods (Miles, Huberman, & Saldana, 2014). However, I used other, emergent methods as part of my analysis that felt more congruent with my epistemology, ontology, and the overall CDAI method, which again is a post-qualitative approach (St. Pierre, 2014). Figure 2 provides a visual overview of my data analysis process. In the next section, I describe those aspects within the major categories of my process that can in fact be described. The process can be separated into the data organization and storage process, which followed typical approaches, and the actual analysis process, which was not typical but was fully congruent with my overall methodological approach.
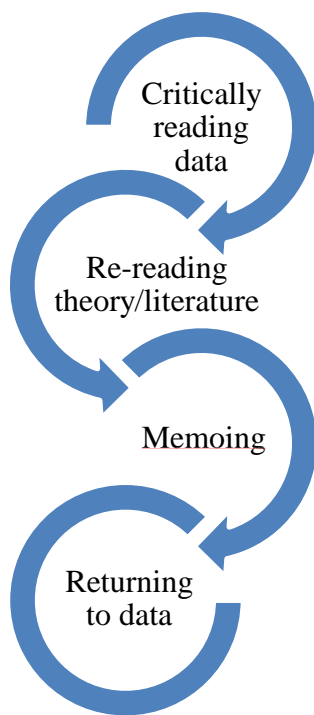
Figure 2. Data analysis process.

Data preparation, cleaning, storage, and organizing. In keeping with good

qualitative research practice (Creswell, 2009; Miles, Huberman, & Saldana, 2014; Roulston,

2010), I undertook several data preparation, cleaning, and organizing steps prior to analysis

to help ensure the validity of the data. First, all recorded data were transcribed by a

professional transcriptionist or converted to a textual form in preparation for data analysis.

Post-meeting reflections and email discussions were transferred into Microsoft Word using

relevant and meaningful file names and saved in organized study files on my personal

computer.   Because I used a transcriptionist, I checked the accuracy of recorded

transcriptions that had significant missing text by re-listening to the relevant recording while

reviewing the transcription and making any edits or corrections. This process served as a

data cleaning measure and also represented my initial data analysis. I also made a data

inventory by hand and then re-created the inventory in the form of an electronic data

accounting log in Microsoft Word for data management purposes (Miles, Huberman, &

Saldana, 2014). This turned out to be crucial given the amount—and types— of data I had.

All recordings, transcriptions, and other study data were stored in my password-protected

private computer in an analysis folder that included subfolders of all the different types of

data (e.g., interviews, researcher memos, group meetings, etc.). Finally, I used

HyperResearch qualitative data analysis software to organize data and facilitate analysis. I

generally read through my study data in HyperResearch to facilitate easy retrieval and

memoing. Specifically, in order to organize and store the data for retrieval in HyperReseach,

I coded segments of the data using the provisional codes I had initially developed, as well as

others that were developed as I read through the data. In the end, I developed and used 30

codes as I read through the data. However, these were used mostly for organizational and

sorting purposes as I also developed the codes QUOTE and NOTE (for example) to capture

and code pieces of data for later retrieval and write-up.

   Data analysis process. As described previously, my initial analysis plans (of which I

had three) were abandoned for a more eclectic and emergent post-qualitative approach,

which included traditional qualitative approaches; CDAI's triangulation among first-,

second-, and third-person; and elements of autoethnography (Miles, Huberman, & Saldana,

2014; Patton, 2002; Torbert, 2013). But what exactly did that look like? On a gross level, it

involved engaging with my data by "any means necessary" and intuitively, as my analytic

needs shifted. At the subtle or micro-level, I was thoughtful and systematic about the

process. As Figure 2 illustrates, my overall process sequentially included: critically reading

the data; re-reading theory and literature; memoing; and returning to the data. In addition to

these major activities, I drew sketches, intentionally bracketed my subjectivity, conversed

with critical friends, and triangulated multiple data sources to substantiate my interpretation

(Herr & Anderson, 2005; Miles, Huberman, & Saldana, 2014; Patton, 2002). Similar to

traditional methods, I read and re-read my transcripts and Word documents, both in hard

copy and in HyperResearch, coding for later retrieval (Miles, Huberman, & Saldana, 2014).

I also wrote copious analytic memos and analysis notes in a Word document and in

HyperResearch (Miles, Huberman, & Saldana, 2014). I ended up with a 25-page, single-

spaced document that included detailed analysis notes documenting any insight—big or

small—about the data and my analysis process and experience as it emerged. Once I had

read most of the data, I went back to the literature, especially theory—Kegan, Torbert,

Berger, Cook-Greuter, and others—as a refresher and to help interpret my data. I wrote

summaries of what I read and how it related to my data and overall inquiry. I drew tentative,

messy sketches of answers to my research questions in blue and orange marker on big sheets

of paper that I taped to my living room and bedroom walls (a key figure in Chapter 4 was

first developed during this process). I needed to do this to make my ideas "real" before they

flew away. I argued with myself and my data, playing devil's advocate against my newly

forming insights. I talked through my budding ideas with critical friends (including group

members), my advisor, and classmates (Herr & Anderson, 2005). Then I read and memoed

some more. At different iterations of reading through the data, I would review specific data

chunks by code in HyperResearch to search for quotes. At times, this review would reveal a

gestalt about the data, similar to considering a theme ((Miles, Huberman, & Saldana, 2014);

however, I mostly found this way of reviewing the data decontextualizing. When I did this, I

often found myself going back to the full transcript and passage and reading more. As such,

this was not my typical method of searching for congruence in the data. Slowly, and as if out of thin air, some meaning began to emerge—the texture of gauze. I used the different sources of data to support and triangulate these tentative thoughts. I also considered the data in the context of the first-, second-, and third-person perspectives, and the particular research question that they answered. As an example of my process, I read the group meeting transcripts sequentially, coding for organization and taking process notes in addition to analytic memos. After reading one meeting transcript, I would read all of the post-meeting reflections related to that meeting to get a sense of what members thought about it and how their experience connected to my reading and interpretation. If I had additional questions or concerns about something I was noticing or a new insight, I would "consult" the related data source. Below are several illustrative excerpts of memos I wrote that demonstrate my meaning-making process. I offer several of these in detail intentionally for the purposes of showing the different types of analytic memos I wrote and of making visible this "intangible" analytic process toward methodologic transparency:

> So as I am now mining the email exchanges for the emergence of the relational aspects of the group … a few thoughts, which are also contained in a note under the May 2014 email exchange, about my very deliberate and thorough holding and facilitation of the group. First, from a practical standpoint, I spent a great deal of time summarizing or serving as secretary for the group, which was a helpful container that allowed the group to move forward and come to consensus. Additionally, my tone and language is very intentional in riding the line between both facilitating and "running" the group while inviting collaboration and participation. Specifically, my language moves between being directive and inviting participation. This was a

challenge for me to manage quite honestly at different points, but I think that it provided a liberating structure (need to look into this literature or concept) for the group…

… So, today I read the email exchanges and a few ideas emerged for me. First, I still feel a slight trigger around Jessie. Our email exchanges emerge as the site of much of Jessie's articulation of her displeasure with the group and attempts to control the activity of the group. It is interesting that she did not generally feel comfortable sharing these concerns during group or with the entire group, but mostly with me individually. My charge comes from this concern about if Jessie was "right"; perhaps I wasn't facilitating the group properly. Also, I wonder if I made space for her and the full diversity in the group. At the same time, I also feel like, especially as I read through the transcripts and sequence, that Jessie did meet her edge and that the group was not a good "fit" or structure for her. More than likely it was a combination of both, my growing into the facilitation role and the group purpose and Jessie's edge…

…The other issue that becomes clear to me in reading over the email interchanges is how the group developed trust and care and friendship that developed over time … this definitely emerges toward the end of the group, which makes me feel that the group was successful in RQ3, in developing collective capacity. In fact, it feels like that's what the majority of the time was in the group, building the holding environment and developing our capacity to evolve consciousness…

…I have read through all of the post interview transcripts, taken notes in the margins, and highlighted specific passages. Before beginning HyperResearch,

I would like to document some ideas and thoughts that are emerging. There are a
couple themes that I am seeing and I will list in bullets/stream of consciousness…

…This is not strictly an analysis memo, but rather my preliminary
understanding of my initial reading of Josselson's The Space Between Us. I read
the first four chapters, which are my primary interests, as one way to begin
thinking about the themes of friendship/relationship and holding environment
(and holding of the holding environment) that are emerging and present in my
data. I almost don't even know where to begin in my thoughts around this. I
definitely need to read the chapter on holding again as it is thick and rich and goes
into details related to the holding environment…

My analysis went in this way until it was time to commit to some new learning in writing,
which I was hesitant to do.

For me, the writing process was an extension of the data analysis, which is consistent
with Miller's (2012) experience. The experience of writing my findings chapter was perhaps
the most difficult piece of writing I have ever done. When I sat down to write what I thought
I knew, it would all fall apart. I found my thinking muddled, and my ideas would not
congeal. Some thoughts lacked data to support them and had to be given up or reconfigured;
others were not fully formed or belonged to another insight—such a painful process of letting
go after all that I had gone through to get this understanding. Still, I realized that I wasn't
going to "know" everything solidly before beginning to write and so the analysis continued
through the writing. I wrote to test out my tentative learnings. I combed through the data
again to glean support for my ideas in quotes and illustrations. I reviewed my analytic
memos. I re-read most of Torbert's work. Through my specific analysis process and the

writing of Chapter 5, I was able to come to a partial, less gauzy understanding of this inquiry, which I describe in more detail in the following chapters.

Trustworthiness and Rigor

The overall trustworthiness or validity of findings in AR and qualitative research has historically been a hothouse of potential controversy as qualitative researchers have attempted to demonstrate the legitimacy and rigor of their approach and methods. Certainly, concerns about rigor rightly apply to all research approaches and methods, qualitative and quantitative. Specific to qualitative research, trustworthiness is related to the accuracy of the findings or "goodness" of the process and data (Creswell, 2009; Coghlan & Brannick, 2010). I imagine this would be a particular concern as it relates to first- and second-person research. There are multiple procedures that can be used throughout the research process to ensure and demonstrate the trustworthiness of qualitative research. Typically, the primary aim of these procedures is to ensure the rigor of the researcher data collection and analysis processes, authenticity of the data, accuracy of the researcher insights, and the inclusion of co-researchers and stakeholders throughout the data collection and analysis process.

I tried specifically to address these concerns within this inquiry, first by being as clear and transparent as possible around my telling of the story, including around the various methodological decisions I faced and made. I also employed thick description and presentation of context, which entailed liberal inclusion of members' voices and interactions or dialogue followed by my interpretation and meaning-making. This followed the spirit of the old admonition to writers to "show rather than tell" and is congruent with autoethnography (Patton, 2002). By showing and not just telling, I allow

the reader to see for her or himself and determine the trustworthiness of my claims and insights. As with any relationship, the trust between reader/assessor and writer/researcher is built through transparency. Though long, this detailed telling was my attempt to pull back the curtain to reveal what these types of inquiries look like without their makeup. In doing so, my hope is that the care, thoughtfulness, and rigor with which I conducted this inquiry is revealed. It is also a revelation of my logic, analysis, and justifications.

The other way that I sought to ensure and demonstrate the trustworthiness of this inquiry—also connected to this third-person demonstration—was by indicating throughout how I used the multiple sources of data toward a well-rounded study with triangulation between first-, second-, and third-person perspectives. As Torbert (2013) notes, this is an ideal level of rigor that even most quantitative studies cannot claim.

Another level of rigor that I applied to ensure the trustworthiness of the data and my insights around it fell under the category of member checking, a common qualitative research practice whereby the researcher presents portions of the raw data and/or analysis summaries to members to solicit their feedback (Creswell, 2009; Patton, 2002). Lather (1993) discusses different types and ways of enhancing validity in qualitative studies that appear more appropriate for first- and second-person research (Torbert, 2013). She names "paralogical validity" under which member-checking falls, which challenges the researcher to constantly remain open to alternative interpretations and explanations. I addressed this in two ways, first in the typical fashion by offering my learnings to members in the form of the written findings chapter of this document and in an abbreviated table form. Two members—Lily and Danielle—wanted to review and

provide feedback. In the end, only Lily provided feedback and comments; however, she read both the entire case study and findings chapters. She validated most of my insights, and she also offered useful questions and corrections, which I addressed in the final iteration. Beyond this one-time and more formal validity check, the design and structure of the inquiry, with its focus on second-person inquiry and practice, allowed multiple opportunities for ongoing confirmation and disconfirmation of my insights and interpretations, as well as the gleaning of members' insights and interpretations around what was occurring. The pre- and post-qualitative reflexive, provocative conversations served this purpose, as did the meetings - which always included specific opportunities for reflection and sharing around what we were learning, and the post-meeting reflections. In this way, my understanding of and insights around the inquiry were partially formed and validated in conversation with my co-inquirers. While the narration of the second-person story is from my subjective, first-person perspective, most of my insights derived from my co-inquirers' and my observations and meaning-making (via the data or subsequent conversations).

Additionally, I ensured the trustworthiness of my analysis and insights through data triangulation. The sheer volume of data, which I considered in its totality as part of my analysis, allowed me to compare and check for congruence and divergence across data sources. As one concrete example, in determining how the group developed collective capacity over time, I was able to examine individual member journal entries, my researcher memos, group meetings over time (as well as specific meetings in which this was named and discussed explicitly), and post-meeting reflections from multiple members.

Finally, I used my researcher memos and subjectivity statements to chronicle and bracket my insights, biases, triggers, and experiences as they occurred throughout the research. This was extremely useful in checking any "charges" that I brought to the analysis. Specifically, this helped me as I read through and sometimes became re-triggered by the memory of various charged moments in the group process. In all of these ways, I endeavored to conduct and demonstrate a rigorous subjective and intersubjective inquiry.

Limitations

As with all research, there are several methodological limitations of this study that require explicit naming and discussion as they impact the learnings that surfaced and connect to the implications for future research (described in detail in later chapters). First, the length of the group's convening was not sufficient to realize its developmental potential. Related to this, I have since had informal discussions with other people who have been part of these types of groups, and most of their groups have been convening regularly for years (usually more than five). They have shared how the longevity of the group was part of its "power" and effectiveness. Finally, the typical time for a full-stage change, if one does occur, is two years (Torbert, 1987; Torbert, personal communication, March 10th, 2016). Another, related limitation was the lack of a pre- and post-GLP assessment due to the short time period of the group. While I collected and examined volumes of first- and second-person data, the lack of an objective post-group assessment limited the ability to examine and demonstrate the third-person results of the study, specifically if we experienced evolutions of consciousness (or rather a stage change). Finally, another limitation was my inexperience with the method. As I have mentioned

numerous times, I frequently found myself at the edge of my knowing and capacity throughout our group process. In many ways, this was a developmental experience for me and may have also contributed to the development of mutuality in the group since none of us were truly "experts" and had to grapple with our not-knowing together—the true essence of action inquiry. That said, I would have made much different choices that may have resulted in more timely and effective outcomes. Despite these limitations, the current study truly functioned as a collaborative developmental action inquiry, following the messy and beautiful path of discovery and development.

Reflexivity and Subjectivity

Though this entire inquiry was an exercise and demonstration of my reflexivity and subjectivity, I would like to state explicitly that this was the most difficult research that I have ever conducted or participated in. It was intensely personal and close, as I was the convener, facilitator, primary researcher, and co-participant. I had to learn how to do it while simultaneously conducting it. It challenged me intellectually and emotionally. It always felt just slightly out of my reach. It confused me; overwhelmed me. It pushed against my developmental edges and capacities. Sometimes I was not able to align my intentions with my strategies, with my behavior, with my outcomes. Just when I thought I understood what was going on, something would shift, and I would realize that there was much more going on than what I seemed able to manage and capture. I often felt ill-prepared for it, incompetent, and "in over my head." I also wanted it to be neater than what it was and "figured out." I certainly did not aspire to conduct a post-qualitative anything.

I also wanted to be "successful" at it. I wanted it to "work." I had an attachment to the outcome; I secretly (or maybe not so secretly) desired for the group and me to experience a "shift" as a result of our work together. Alas, in many ways, my experience of this research mirrored the larger life experience that brought me to it. This is not surprising given the personal nature of this work. However, because of this, the experience of conducting this research served as a facilitator of my own consciousness development. Yet, this is also what made it beautiful and precious. I was and am continually reminded to cultivate this space of "living inquiry" —to stay present to the various territories of my own awareness and knowing as they emerge.

In summary, this was extremely complex and challenging research, both methodologically and personally. It required an intellectual and emotional astuteness and attention that was sometimes beyond my developmental capacity. However, through the continued enactment of CDAI and the discovery of a post-qualitative research approach, I was able to emergently craft an inquiry that was both flawed and rigorous, that illustrated the possibilities of evolving consciousness in community. In the next three chapters, I describe what emerged from this collaborative developmental action inquiry.

CHAPTER 4

CASE STUDY

We set out on a journey to discover ourselves and what we were missing. We would have to traverse and navigate unknown shores. The boat was narrow. The ocean was wide. We had no idea where we were going. Yet we arrived at the edge of the shore at the agreed upon time—the seven of us—laden with bits of our belongings that we refused to leave without. The treasured and taken-for-granted odds and ends of ourselves and how we were known clung to us—a little tightly here, barely hanging on there, but still somewhat intact.   Our journey here was illuminated by the light of day, but dusk was descending, and the day's warmth was disappearing with the sun. We collectively looked out at the line of the horizon, the water's edge where it met the sky. "There's our destination," we thought, "but what is it the end or beginning of? And how will we get there?" Some of us didn't know if we wanted to get there—to the edge of our sight and the known world. Would we fall over? Would the horizon swallow us? Some of us, especially me, questioned how I would get us there. I had issued the initial call, and these were the ones who came, skeptical, excited, unsure, and full of non-specific hope. We would learn that I alone could not get us there. We would need to listen into the dark using our mother wit, each other, and other guideposts we encountered along the way. But none of us knew how to listen into the dark.

Jessie's dissatisfaction with the group had become palpable and culminated around a seminal meeting to which we had invited a guest to help us debrief and understand the results of our Global Leadership Profiles (GLPs) and what they meant for our collective work. This was a big moment for the group. It was the end of September 2014, almost 10 months after we began convening. We had come a long way in our process together and felt at the edge of a promising shift in our connections to each other and in our functioning as a group. Initially, we had not planned on learning the results of our GLP assessment until after the group's work had ended, but we decided to de-blind

ourselves in order to move deeper into our work together. Amazingly, the results showed

that we were all in a similar stage of development—mostly conventional crossing over

into post-conventional, which partially explained why we had been drawn to the group in

the first place and why we were finding ourselves collectively stuck in similar ways. I

had sent everyone their individual results separately a few weeks prior to the meeting.

After much discussion and coordination of schedules, Aliki Nicolaides, my major

professor and an expert in CDAI methodology who was also well versed in constructive-

developmental theory, agreed to help frame our results and what our work moving

forward might look like.

The meeting started at the predetermined time, as usual. Everyone had joined the

Adobe Connect video meeting as expected, except for Jessie. I had sent out the meeting

reminder a few days earlier but had not received an email or other notification from

Jessie stating that she would be absent. I waited a few minutes, expecting her to join

late, thinking that maybe she had overslept (as she had for one meeting). Ten minutes

passed—but no Jessie. The group decided to start without her to stay on schedule, and I

sent her an email letting her know. I didn't hear anything back from her. The meeting

was powerful; for many of us, it was clarifying moment. It seemed that we had finally

understood, at a deeper level, what we were "up to" and how our work should proceed —

that our work was to peer into our full selves and sense our way into our next timely

action, moment by moment, through a deeper connection to our being rather than through

our usual expert-based, action- and achievement-oriented focus. This was a scary

prospect and still at the edge of our knowing in many ways, but that was the entire point,

and the group felt ready to take the next step. Mimi and I both expressed disappointment

that Jessie, who had been struggling with the group's work and becoming increasingly isolated, was not present to contribute to and benefit from the discussion and experience. Then, immediately after the meeting, the following exchange occurred by email over the course of a week[7]:

Shakiyla: What a rich and full meeting today! Really! As always, I continue to be humbled and inspired by our work together and by everyone's bravery and vulnerability. Jessie, we missed you and were thinking about you! Oh and along with [all of] your post-meeting reflections, can you just provide a brief update to the group about what's going on in your life and where you are (physically and emotionally) since we didn't get to do a check-in?

Jessie: [Well, first let me] apologize for missing the meeting this morning. I had some needed "me" time late last night doing nothing except watching mindless TV, and then woke up a little late this morning. Woke up [and] to my pleasant surprise, my teenage son was at home, awake, and asked to go shopping with me. I hardly spend much time with my son anymore since he is always out with friends or doing sports, so I jumped on the opportunity. We went to a sport[ing] goods store, got him a haircut, bought dog food, and had lunch. Nothing too exciting, but it's quality time for the both of us. This time with him was very valuable to me, so I hope you will understand my absence.

Shakiyla: So, in the spirit of our group's work of being vulnerable and open with each other, and learning to provide challenge and support for our own and each other's

---

[7] The text of the email exchange is an almost verbatim presentation of participants' actual writing, with minor edits, augmentations, and additions for clarity and flow. Significantly altered and added text is bracketed. I also forego the standard presentation and formatting of quoted material to preserve the narrative presentation. Rather, quoted material is highlighted in italics.

benefit, I would like to share my disappointment that you were not at Saturday's

meeting. It was a key meeting featuring an invited guest who made time in an extremely

busy schedule to support our work. My intent here is not to put you on the spot or convey

that we have to attend all meetings or that we don't have choice in when we attend

meetings. However, my hope is that we privilege the work (particularly the meeting

space) of the group to the best of our abilities for the limited moments that we have

together.

Jessie: S, thanks for sharing your feelings, and [I] appreciate you opening up the

conversation. It is always good to feel valued and wanted. I was really looking forward

to this session with your professor, so I was disappointed myself also. At the end of the

day, it boils down to priorities and personal choices. I was once told by a smart person

(forgot who) that life is like juggling many balls, some are made of rubber and can

bounce back, while some are made of crystal that can't be mended after being shattered.

We have to understand which ones are the most important to us and act accordingly. In

my case, my son will be leaving for college in 10 months, so spending time with him is

definitely a million dollar crystal ball to me. [That said], I don't want my lack of focus to

be distracting or disappointing to the group. If it is creating any kind of dissatisfaction in

the group, or becoming a barrier for the team's cohesion, I am willing to step aside so

the group can move on without me. This is an honest and open discussion, and I want to

hear what you all (anyone) feel. Whatever you say will NOT offend me as long as it is

truly how you feel.

Shakiyla: [Jessie], I do have some thoughts, the primary one being around the

necessary commitment needed for this group to "work" and meet our individual and

collective needs, given our multiple commitments. There really is no way around this commitment, and it is likely time to have a fuller conversation around it, especially as we move deeper together. You are not the only one engaging in these considerations and decision-making processes. I also want to say that I do not want you to exit the group. You are valued and wanted. I think this is, however, a good time to revisit our earlier discussion about shifting commitment to and engagement with the group (and what really gets in the way). That said, I would like others to respond. [Jessie] has made a request to the group for feedback and this provides an opportunity for us to both support and challenge her, while also engaging in our individual work of sharing and showing up.

Danielle: [Jessie], at the end of the day, you're absolutely right, it comes down to your "priorities and personal choices" as you put it, but one must also consider one's impact on others and one's commitments. I've REALLY struggled with how best to go about discussing this issue since I find it very triggering for me, and quite honestly I'm so stressed, fatigued, and overwhelmed by my own stuff that my capacity for much compassion is quite low. I think your justification for missing the meeting is no different than one any one of us could use to miss engaging. We may not all have children, but we all have someone we love and value with whom we are rationing time away from (though we clearly know we need to spend time with him/her/them) in order to fulfill our own commitment to the group and the betterment of ourselves. I'm absolutely certain that no one thinks spending time with your son is not valuable, important, etc. Everybody struggles with trying to stay true to their priorities and utilize their time in a way that honors that. You and your struggle are no different than every member of this group,

Jessie. Your actions convey to me (whether intentionally or unintentionally) that you imagine that your time is more valuable than that of your group members. We all value our time just as much. You are no different. Your time is no more valuable than ours. Your input to this process and to the group is just as important and impactful. But honestly, unlike Shak, I will not attempt multiple times to try to convince you to do something other than what you want to do. I really do think this group is something that would benefit your mental health as well as your overall development (as it would all of us, hence our reason for being part of it). But it's your choice to make that a priority. You're absolutely right about that. [But] perhaps you should consider reframing how you consider your work with [the] group…

Mimi: [Well, for my part], I don't want you to stop, [Jessie]. As Shakiyla stated, you are a vital member to EOC [Evolution of Consciousness group]… You add a perspective that I often don't think about and challenge my own development growth. In fact, I really felt your absence last week and even wrote during our call, "I wish Jessie was here." We had what I thought was an amazing breakthrough … and I felt sad that you were not able to experience it with us at the same time. I hope you find these words an expression of how much we want and need you to continue with the group—pushing ourselves in our development journey. As Danielle pointed out, your presence and actions do impact the group and it would be a pity if that didn't continue.

Lily: First, I want to thank you for requesting feedback from the group. That's a courageous move and one I'm not sure I would have made. It certainly makes me feel more comfortable being open and honest. I have multiple thoughts/feelings about your absence. I was triggered slightly after reading your original email. The fact that this was

a non-emergency, last-minute decision did feel like you weren't valuing the group. And while I recognize that oversights happen, your decision to miss group without letting us know via phone, text, or email as soon as you could seemed disrespectful. That said, this was a minor irritation. The feeling came and passed quickly enough. But I felt like it was important to be honest about it. I also wonder if you're starting to feel disengaged from the group? I place no judgment on that either way since I know my engagement level continues to shift. Just wondering how you're feeling in relation to the group as that would play a role in how you prioritize it. And in the spirit of our developmental work, do you think you might be pulling away because you don't feel like you're seeing results and/or that the group is not meeting your needs or expectations? I ask that because I remember you voicing some frustration about the pace of the group. If that is the case, I think Danielle's suggestion about reframing our group work might be helpful. If the commitment of any group member falters significantly, that will pose a problem as our actions and inactions have effects. I'm not sure if you feel that this will be the case for you moving forward. I do hope that you'll decide to remain with us as we begin to explore deeper, but I understand if you feel the need to prioritize different things right now. Like others, I definitely missed your perspective and presence during our meeting. Like Mimi, I feel that your way of speaking up and seeing things challenges me in a good way. I'd like to get to know you better and vice versa.

I responded by offering a synthesis of and commentary on the discussion and what it meant for the group moving forward, and I invited others to comment, especially Rose who had not yet joined the conversation. Jessie and Rose remained silent. Then, after a couple of days:

Jessie: Sorry for not responding sooner. I took some time to absorb all the feedback and listen to the meeting recording (twice). First of all, thanks for pointing out my misbehaving. [The] no-show was bad, and not communicating ahead was indeed disrespectful. I appreciate you calling me out. I actually thought you guys wouldn't care if I was there or not, and I was wrong. [I will say that for] not one single second I would feel my time [is] more important than your time, nor my relationship more important than your relationships. Nor would I judge how anyone prioritize[s] his/her life. I am truly happy that you all are excited about the discovery in this group. Unfortunately I have to admit that I don't feel the same excitement, which resulted in my recent disengagement, and listening to [the meeting recording] just reconfirmed my feelings. Words like "stuck," "scary," "overwhelmed," "in the shadow," etc. were repeatedly used to describe the group's "collective" status, but I don't feel the same … I am early-Redefining. My old self [would] question why I am not at a higher stage and [would] push hard to get there, but now I am content to be who I am. I will continue to improve but won't force myself and [get] stressed out about it. Don't get me wrong—my life is not all smooth sailing, and I have my share of problems, but I have grown to see the cup half full. I have learned to realize reality, accept mine and others' limitations, choose the best option available at the time, and move on. It's not always easy. Life will always have ups & downs, but overall life is good. It took me ~6 years to get to where I am today mentally and emotionally, and I am 50 years old. I want to move forward with my progress. I want to explore re-integration. I am always curious to learn new tools, but I don't want to feel "stuck" at the same discovery stage where I was years ago—thus

my frustration—So I do have to reframe my involvement with the group in a different way.

     Mimi: I am glad you received our comments in such an open manner. And I continue to appreciate your honesty and candor. As an early Redefiner [sic] myself, I actually can relate to the feeling of wanting to move forward, but what I learned is that when feeling that desire, I too often revert to my Achiever mode. And in reading your [email] response and reaction to Aliki's comments [during the meeting] you might also be doing that. We are so used to "getting things done" that at times we struggle with the process of being still, and I believe I am seeing that in you. Please know this is not judging but an observation I wanted to put on the table. I think our work is to not only discover and be kind [to] ourselves, being comfortable in our own shoes, but also to push ourselves in those uncomfortable areas, moments in life where we have a group of people who can support us in this process of growth. The stuckness you are feel[ing] is something we are all facing, and I honestly believe we can help each other. We all have our blind spots, and I believe one of the goals of this work is to help each other see them and help to find solutions to address them. My two cents.

     Following this exchange, Jessie and I met at a Chinese Hot Pot restaurant on a Sunday night for dinner to discuss all that had happened and her fit for the group. Jessie had suggested this restaurant as she had grown up eating hot pot meals in Hong Kong. Traditional hot pot comprises a big pot of hot broth that families sit around as they dip various thinly sliced fresh and raw meats and vegetables in to cook and eat. It was a fond memory for Jessie, who loves food and socializing over food. I had never experienced this type of meal before, and Jessie demonstrated how to cook the huge plate of

vegetables and noodles I had ordered in the boiling pot of broth set into our table. She

was clearly an expert, and I loved watching her manage adeptly which vegetables to cook

when and for how long, her chopsticks moving quickly from plate to pot to mouth. Over

bowls of steaming soup and surrounded by crowded tables of families having communal-

style Sunday dinner, we navigated our way through a long, four-hour dinner and

conversation that was alternately light and thick, collegial and tense. I wanted to support

Jessie's experience and perspective while at the same time challenge her around what I

viewed as a developmental edge[8] and blind spot I saw surfacing—namely her need for

concrete process and outcomes, self-isolation and over-differentiation from the group,

and discomfort with ambiguity. At times, she could see this—a slight glint of recognition

flickering across her eyes—but mostly she did not. She fiercely wanted acknowledgment

of and respect for her right to determine for herself how far she wanted to develop and

how much she wanted to connect and engage. She insisted that she was happy with her

life as it was and with her current stage of development, and did not feel the need to

move beyond where she was. I acknowledged her right to self-authorship and assured

her of my non-judgment of her choices. However, in the spirit of our work together it

was also important that we be clear about and name what was also occurring—that this

was a shift from her earlier stance and her reasons for joining the group and that she had

likely met a developmental edge. Our conversation was tensest during these moments as

we both spoke candidly and with conviction. At the end of dinner, we affirmed each

other's value and our mutual enjoyment of each other's company, and agreed that she

should exit the group. We hugged over our farewells and talked about getting together

---

[8] This is defined and discussed in more detail later.

for dinner in the future. The next day, Jessie sent the following email to the group, as I had requested during dinner:

Jessie: Thank you, Mimi, for your insight. I had dinner with Shakiyla last night, and this is exactly what we discussed. I have no doubt that the work we do is great, and in time it will help us all to become better human beings. I acknowledged that I have my own shadows and limitations that certainly have negatively impacted my own learning capabilities and aptitude to grow. [Having] said that, to me it still boils down to priorities. At this point in my life, I choose to focus only on a few things that are top on my list because I no longer want to feel overcommitted by chewing more than I can handle with limited time/energy/brain-power/value/etc. This is actually a development for me because my previous self [would have wanted] to do it all and then get all stressed out. Just like Aliki said, we should recruit the appropriate action-logic; for me I believe the Achiever action-logic is the best here to help me rank my competing priorities against my constraints. You may not agree with my choices but yet you may have a different aptitude level than I do, and I am not shy to admit that I have limits which drive my decisions. It is purely protective behaviors, and I am not sure it's all bad. Based on this realization, I have decided to drop out of the group. I won't be able to add value to the group learning as much as I wanted to if I can't focus on the need of this group as a unit. I apologize for acting selfishly and if I have caused disappointment. I sincerely wish you all the best growing in your life journeys.

I recount this reconstructed story and dialogue in its near entirety as an introduction to this case study description and to highlight a key moment of learning and functioning in the group. It was a climax in our larger story that stood out for all of us—

the moment of Jessie's exit. Every member, except for Ruth (who had exited well before this) and Jessie herself, mentioned this moment—unprompted—during their individual post-group conversations with me as a turning point in the group. It was a seminal moment of drama, layered with meaning, around which other moments hung and paled in comparison. As evidenced in the dialogue and description, many salient features and dynamics of our group surfaced in this moment, some of which I highlight briefly here before fully introducing the case.

As context, Jessie's dissatisfaction with and criticism of the group had been building while the group as a whole was developing more trust and capacity. The group exchange and Jessie's subsequent exit occurred just as our work was becoming even clearer and when we were at the threshold of moving deeper into our engagement with our consciousness and shadow. Our collective ability to confront and challenge Jessie, which would not have happened just a few months before, was indicative of this movement. Even Jessie's outspoken public expression and "acting out" around her dissatisfaction were symbolic of a shift in the group's functioning and increased level of risk taking and vulnerability. As such, this moment was so seminal partly because it occurred simultaneously with an overall shift in the group. Indeed, as the dialogue illustrates, members used developmental language much more fluently, exhibited a more nuanced understanding of the concepts and purpose of the group's work, and advocated willingly on behalf of themselves and the group.   Similarly, members also said that everyone got "more real" and honest in that moment, which was likely caused by the emotional trigger of Jessie's dissatisfaction and tension-filled exit. In many ways, this was the first time that we collectively experienced a strong first- and second-person

reaction to another member's actions and behavior. Suddenly, our work together became more personal (and interpersonal), not just intellectual.

Another important element of this moment was that it provided a living, personally relevant illustration of the developmental edge—a term that I began using during the group and refer to frequently throughout this case description. In my usage, a developmental edge refers to a limit in one's ability to see, understand, and act beyond which one cannot easily move. In this sense, a developmental edge can be viewed as an epistemological and ontological limit—the edge of one's knowing and being, the boundary of one's awareness and meaning-making capacity. As I will discuss in more detail, we all experienced developmental edges during the group process which were typically unrecognized in the moment. However, Jessie's developmental edge and her inability to recognize it as such were on full display for the group and provided a mirror reflecting our own potential developmental edges. Because such edges usually lie outside of our awareness and represent an epistemological and ontological boundary, it is often easier for others to see them in us before we can. In this case, others could see Jessie in ways that she could not see herself, though her last email reveals some recognition and acknowledgment on her part of the possibility of a developmental edge. This illustration via Jessie's exit, particularly at that moment in our group's development, further strengthened our collective capacity to examine our own and each other's consciousness.

Case Framing and Background

In the remainder of this chapter, I fill in the important details around that key moment of Jessie's departure, telling the story of our inquiry as it unfolded—the story of

our group as a case study of our particular exploration and enactment of CDAI. We used CDAI as a guiding framework and theory of action. Congruent with CDAI and this inquiry as an embedded case study, with the primary case and unit of analysis being the group (or second-person level) and each member of the group serving as her own case or first-person-level unit of analysis within that, we collected data at the first- and second-person levels. However, as the inquiry unfolded, the story of the group began to emerge more clearly and more prominently, and as I discuss in Chapter 5 ("Findings"), I chose to privilege the second-person group story. As such, the unit of analysis and description of the case are primarily at the system or group level, with considerations and illustrations of individual, first-person stories woven throughout as needed and relevant.

As described earlier, CDAI is a highly collaborative, fairly complex type of AR. Following a typical AR iterative cycle of thinking, acting, and reflecting within CDAI methodology, the CDAI group met regularly to consider and discuss our concerns, consciousness, and meaning-making around our lives and ourselves; plan and practice facilitative actions or interventions toward these concerns and considerations; and reflect on the results of our actions (within and outside of the group) and any learning that occurred. Consistent with CDAI methodology, we considered first- and second-person activities that would allow us to engage in action and inquiry simultaneously. Like many AR approaches, the CDAI approach offers a great deal of flexibility around its actual methods and techniques; it simply specifies that one conduct a multi-faceted inquiry that attends to the multiple territories of experience (i.e., intentions, plans, actions, and outcomes) and the three types of inquiry and practice (i.e., first-, second-, and third-person) with a group of people for the purposes of facilitating more equitable and

effective action via individual and group development. The form of this approach is open for determination by the particular inquirers (Torbert & Associates, 2004).

Given the openness of the method, the exact structure and content of the group's process emerged over time and remained flexible and iterative. As such, while the traditional AR cycles technically applied here, they did not necessarily happen neatly across a larger time continuum and typically occurred within the context of each meeting cycle. Furthermore, I found it more useful to explore the group process and story from a developmental perspective rather than that of the traditional AR cycle sequence.

As a brief review, CDAI describes eight action logics[9], which are essentially epistemological frames, or orders of consciousness, that represent and inform the way a person knows and takes action in the world. Similar to individuals, groups and organizations can be described developmentally or characterized by action logics (Torbert & Associates, 2004). Specifically, Torbert (2004) writes:

> Within the overall organization, particular projects or divisions may represent leading or lagging developmental tendencies. Similarly, your own department or a team or a task force may transform from one stage of development to another during a single meeting or over the course of several meetings. (pp. 124-125)

Torbert details eight organizational action logics that align with the individual action logics from impulsive/conception (individual/organizational) to alchemist/foundational community of inquiry. While the organizational action logics offer a helpful framework to consider the group's development, I found the individual action logics more useful structures for describing our process and development over time given the highly

---

[9] Impulsive, Opportunist, Diplomat, Expert, Achiever, Redefining, Transforming, and Alchemical. See Chapter 3 for a more detailed description.

subjective and inter-subjective (and non-organizational) structure and context of our work. The organizational action logics are mostly geared towards larger, more formal and structured systems and settings. Furthermore, Torbert (2004) suggests that it is appropriate to describe groups and teams according to the individual action logics.

Toward the end of the group's work and during my data analysis, it struck me that the group had moved through what I thought of as a developmental arc that mirrored individual development through the action logics. Furthermore, during our 12 months together, our group process and activities, collective awareness and thinking, and interactions shifted in phases that mapped onto the characteristics of different action logics starting from Diplomat (or pre-conventional) to Redefining (or post-conventional). Figure 3 illustrates the group's developmental arc and movements through the action logics and the key events that occurred within that arc. Another meta-insight around this movement was that, similar to individual development, each stage brought its own gains and losses, releases and tensions. These impacted our collective work as well as our individual experiences, and served as key parts of the story. Specifically, during significant transitions, it appeared that those members who were not ready or able to transition to the next stage of development and functioning with the group experienced particular challenges and developmental edges, resulting in their exiting the group. Given our developmental arc, I tell the story of the group and its key moments as we collectively mirrored and moved through the different action logics. First, however, I set the stage by describing important contexts such as our meeting structure and process, and basic member backgrounds.

Convening
• Politeness and self-protection
• Reliance on me as leader
• Concern about image and vulnerability
• Mixture of interest/curiosity and unspoken skepticism
• Determining purpose and intent

Ruth exits (July 2014)

Expert/Achiever (June – Aug 2014)

• **Taking action/experimenting**
• Basic understanding of concepts and method
• Assertion of ideas, opinions, and self
• Focus on group purpose and individual interests/concerns
• Structured as a group of individuals
• Triggers, blindspots, and developmental edges surface

Ending and re-envisioning
• More relational, vulnerable, and mutual
• New understanding of purpose and development of insight
• Have 'skin in the game'; want something from group
• Development of a collective/systems view
• More comfort with process and tolerance for ambiguity and shadow

Diplomat (Jan – June 2014)

Jessie exits (Sept 2014)

Redefining (Aug – Nov 2014)

Clearing our Throats   **Getting in our Way**   **Listening into the Dark**

Figure 3. Group developmental arc and movements.

Setting the Stage

Member Profiles

In this section, I provide a brief description of each member at the time of the study (i.e., 2014). Again, wherever members are referred to individually, their real names have been replaced with pseudonyms.

Mimi. Mimi is a first-generation, African-American woman in her late 30s who was born and raised along with her three brothers in Northern California by immigrant parents from Equatorial Guinea, West Africa. Her mother was a nurse's aide with a high school education, and her father was a university professor. They divorced when she was a teenager. She is single with no children. She has a master's degree in public health and currently works in Southern Africa for a United States government agency. At the time of study, she was struggling with dissatisfaction and disillusionment in her career as well

as in her religious faith. She also desired to be partnered and have a child, both of which had been difficult for her to achieve, causing her much distress over the years. She and I completed our public health training together and have been close friends ever since.

Lily. Lily is a 40-year-old African-American woman born and raised in Philadelphia, Pennsylvania. Her mother was raised primarily in a small town in Georgia but moved to Philadelphia after college where she met Lily's father, who was born and raised in Philadelphia. Her parents never married, and she and her older brother were raised by her mother in a middle-class, multi-generational household that included her maternal grandmother and sometimes aunts and cousins, or, later, her brother's children and wife, who lived with them periodically. As a child, she had sporadic contact with her father, who was a hypercritical and triggering figure for her. Her mother holds a master's degree in education and was a special education teacher in an elementary school. Lily has been married to her college sweetheart for eight years and has no children. She has a master's degree in school psychology and works as a school psychologist. At the time of the study, her most pressing adulthood struggles centered on experiencing and managing her emotions—specifically social anxiety and an eating disorder; career effectiveness, confidence, and satisfaction; building a community and connecting with people; and improving her marriage. Lily and I went to college together and have been best friends since.

Rose. Rose is a Cape Verdean-American woman in her early 30s of mixed racial heritage from the Bay Area of San Francisco, California. Her mother, who was Black, died of breast cancer when Rose was three, and she was raised by her father, who is White, and stepmother (from the age of seven), along with her younger half-sister. She

has never been married, though she is currently dating, and has no children. She has a bachelor's degree with concentrations in public policy and America institutions, and Portuguese and Brazilian studies. She runs a small business in Southern Africa, where she has been living since completing the Peace Corps there after college. Her primary adulthood challenges were career effectiveness and work-life balance, and feeling isolated and without a community. I did not know Rose before the study; Rose and Mimi met in Mozambique and are part of a mutual friendship circle. Mimi introduced Rose to the study.

Danielle. Danielle is a Jamaican-born woman in her mid-30s who lives and was raised primarily in Georgia since the age of seven with her younger sister and brother by her Jamaican immigrant parents. Her mother has a graduate degree and works in higher education. Her father, who was not educated past high school, worked in banking until the family moved to the United States. Her parents have been married throughout her entire life. She is single with no children and is a practicing family medicine physician. Her pressing struggles at the time of the study were recurring mental health struggles, namely anxiety and depression, career dissatisfaction and uncertainty, finding a suitable partner, and managing her relationship with her mother. Danielle became friends with Mimi and me in public health school, which she completed after medical school.

Jessie. Jessie is a 50-year-old Chinese woman born and raised in Hong Kong who emigrated to Toronto, Canada, for college along with her parents and younger sister and older brother. After moving to the United States about 20 years ago, she married an American man and had a son who at the time of the study was 15 years old. Though she recently completed a master's degree in adult education, her primary training is as an

engineer, and she currently works as a project manager in Georgia, where she lives. She was separated from her husband and focused on helping her teenage son finish high school and start college. She joined the group because she was feeling lost and "stuck" regarding where to go next in her life professionally and personally, desiring to have more of an impact but not able to take steps toward this goal. She felt that she was in the midst of a major life transition around her two primary roles as mother and wife, struggling to determine a deeper level of meaning and contribution. Jessie and I did not know each other prior to the group but met at an adult education workshop that we both attended.

Ruth. Ruth is a 40-year-old full-time doctoral student in adult education who lives in Pennsylvania. She is divorced with no children. She and her younger sister were born and raised in Athens, Georgia, by a single mother. Ruth is an ordained minister and much of her identity centers on her Christian faith. She joined the group because she was having a difficult time balancing all of her life demands, particularly those of being a full-time student and a woman of faith. She recently experienced the traumatic loss of her sister, which shifted her considerations of her role within her family. As a result of these changes and various demands, she felt that important parts of her identity were slipping away and that she was struggling to connect to the world in an authentic way congruent with God's plan for her. I did not know Ruth before the study; she was referred to me by word of mouth.

Shakiyla. I was the primary researcher, convener of and a full participant in the group. I am a 40-year-old African-American woman who was born and raised in Philadelphia, Pennsylvania, during the height of the crack epidemic. I was an only child

until the age of 16, when my younger sister was born. Both of my parents were born and raised in Philadelphia, and they never married each other. In fact, I had infrequent contact with my father after the age of four, and my mother raised me primarily as a single parent until she married the father of my yet-to-be-born sister. My mother was educated through high school and worked as an investment banker for 20 years. We were lower middle class until she married my stepfather, who was a stockbroker, when I was a teenager. I was married for five years but am currently single with no children. I live in Atlanta, Georgia, and work in public health. I have a master's degree in public health. At the time of the study, my primary adulthood struggles were around career calling and satisfaction, having a healthy and fulfilling intimate partnership, and managing my relationship with my mother.

Meetings

The group met for approximately 12 months, from January 2014 through January 2015. Initially we met monthly, but midway into our process we began meeting twice a month for a period of time (the rationale for this change is described in a later section). Table 4 lists the dates and primary focus and content of the meetings. In the group's developmental arc, we followed a path of moving from introductions and determining a shared purpose, through testing interventions, to developing a new understanding of our work and commitment to each other and the group. I provide details of specific meetings as part of the group story throughout this chapter.

Table 4

Meeting Inventory and Content

Meeting Date	Key Moves/Interventions and Content
1/25/14	Introductory meeting 1: Member introductions and logistics of group.
3/1/14	Introductory meeting 2: Introduction to theories and concepts; discussion of operating principles and norms.
3/22/14	Refinement of operating principles and norms; discussion of shared purpose.
4/26/14	Finalizing operating principles and norms; synthesis and reframing of shared group questions and focus based on between-meeting feedback; discussion about and selection of first interventions (360 personal assessments and U-journaling activity).
5/24/14	Additional reframing of shared group questions to include systems-level considerations; discussion about and planning for first interventions (360 personal assessments and U-journaling activity); group also more seriously discusses meeting twice a month.
6/28/14	First formal intervention: U-journaling activity; start of post-meeting reflections via email; Ruth's last meeting (she exits group after).
7/26/14	360 Assessment and U-journaling reviews/debrief; Jessie is really agitated in this meeting.
8/23/14	Presentation of four parts of speech; group reflection on process/temperature check; discussion of next interventions; discussion of the importance of naming and the intended relational, inquiry work of the group. Members also advocate for meeting in person and discuss the relational issue/concerns a bit here. More discussions around additional meetings. Jessie's last meeting.
9/6/14	First additional meeting. Consideration of group shift: How well are we doing at creating/building our collective capacity to raise the consciousness of the members? What is it that we can do to build the capacity of the group? This is the first additional meeting. Jessie and Rose are absent due to scheduling conflicts.
9/27/14	Group receives and debriefs GLP results; Aliki joins call for debrief; Jessie skips meeting resulting in group shift, and she exits group after. Group discusses and reframes nature of our work.
10/18/14	Processing of Jessie's exit and group dynamic; revisit four-parts of speech; discuss next interventions and ending of group. Group considers extending past November.
11/1/14	Mimi co-facilitates meeting; shadow work intervention debrief.
11/22/14	Initial last meeting and reflection on group process; Lily and Rose are absent due to scheduling/last-minute conflicts. We reschedule with the entire group.
1/17/15	Rescheduled final group meeting with reflection on collective and individual developmental arcs and shifts. Four of five remaining members agree to continue the group.

The next section describes the story and developmental arc of the group as we moved through the various action logics.

Group Developmental Arc and Movements

Diplomat: Clearing Our Throats

The Diplomat action logic represents a pre-conventional stage of development; individuals who make meaning using this action logic are mostly concerned with meeting socially and culturally defined values and goals. The Diplomat is able and often prefers to subjugate her or his own needs for social acceptance and belonging, desiring the approval of important others. Our early work and interactions—from approximately January to June 2014—were characterized primarily by this action logic. During the initial phase of convening and inquiry, most of our work centered on getting to know each other and better defining and understanding the shared concern and focus of the group. All six group members had been recruited by October 2013; thus, we decided to begin convening in January 2014. We held our first introductory meeting on January 25, 2014. The meeting, as with all subsequent meetings, was held virtually using Adobe Connect, a video-conferencing platform. Prior to our formal convening, all group members took the validated Global Leadership Profile (GLP) as a third-person assessment of their current action logic or order of consciousness. However, based on prior agreement, none of us received her results; rather, the results were sent directly to my major professor, who was to hold them until the end of the group (as detailed in later sections). The initial meeting lasted two hours and focused on making introductions, describing the group purpose and expectations (including work to be done between sessions), discussing operating norms, and detailing subsequent meeting structure and

content. All members were in attendance, and we collectively agreed to run the group

until November 2014, meeting for two hours on the fourth Saturday of each month.   My

overarching goal for this first meeting was to officially convene the group and set the

stage for our work together over the next 10 months (the initial commitment). I was

terrified and over-prepared, as is usual when I enter a new situation in which I feel

expected to perform and the stakes are high. Given the nature of this inquiry, I wanted

the first meeting to not only address technical concerns and process considerations for the

group but engage members' hearts beyond a purely intellectual interest in the group topic.

In fact, I envisioned the first two meetings as two parts of the introduction to the group,

with the first meeting serving as a heart engagement and the second representing a

cognitive engagement. Between the first and second meetings, I sent to the group two

articles and a video about the primary concepts and methodology—that is, cooperative

inquiry, collaborative developmental action inquiry, and constructive-developmental

theory—undergirding the project (Foster, 2012; Pruyn, 2010; Reason, 1999). I also asked

members to complete the GLP's self-assessment (described in Chapter 3) for discussion

during the meeting. The self-assessment document was sent to each of us after we

submitted our GLP responses to Action Inquiry Associates for scoring.

The second meeting took place at the beginning of March 2014 because we could

not find a suitable date in February, and it was important that everyone be present for this

second introductory meeting. In this meeting, we finalized our operating norms,

discussed the articles and related concepts, and discussed our proposed group structures

in more depth. All of this was meant to give members a better idea of what we were "up

to" as a group and to create an avenue for me to share power with the members via

knowledge and information about methods and processes in preparation for greater

mutuality later. I created an online Google Group for us to engage in discussion and

dialogue between sessions and to share group documents, and I also created a group

electronic mailing list for communication purposes. I suggested that members use an

online journaling tool (Penzu.com) to chronicle their first-person experiences. This tool

also allowed them to easily share their journal entries with me electronically. During this

second meeting, we had a robust discussion about constructive-developmental theory

(CDT) (Kegan, 1982, 1994) and our self-estimated action logics. Due to limited time, we

continued our discussion outside of the meeting in our Google Group. I remember being

impressed by the level of initial engagement in the group from most members. Their

responses were thoughtful, even if tentative, and everyone seemed to be making an effort

to follow the developing group norms and to contribute.

Following the first two meetings, we held our two-hour monthly meetings until

around September, when we increased to a twice-monthly structure and increased our

primary meeting duration by 30 minutes (to 2.5 hours). However, the meetings had a

standard structure that had been established during the first meeting and sanctioned by

the group:

- Brief check-in: Group members went around and briefly, without interruption,
  stated how they were doing and identified anything significant that had come
  up for them or had been going on in their lives since the last meeting.

- Brief mindfulness/centering practice: At the beginning of each group meeting,
  I lead the group through a short mindfulness or centering practice (described
  earlier in Chapter 3).

- Learning: This did not happen during every meeting but included brief overviews or tutorials about specific techniques, methodologies, or interventions in which the group planned to engage.

- Intervention/intentional practice/discussion: The bulk of the group's work usually included specific discussions, activities, or interventions related to a concern (e.g., U-journaling practice, shadow work, etc.).

- Group reflection: This included in-the-moment reflections on the group and/or individual process, and experiences with the meeting.

- Close: This included a summary of the meeting themes and time for any last-minute comments or post-meeting action-item reminders.

Typically, after each meeting, I emailed reflection prompts and questions to the group to capture any thoughts or feelings that surfaced for members following the meeting (see Appendix E). Initially, I attempted to initiate post-meeting reflections and discussions via the Google Group; however, participation was sporadic, and some members found the Google Group difficult to navigate or inconvenient to check. In response, we agreed that members would send post-meeting reflections by email, and I would collect and store these as part of our group data capture. After switching methods by which group members shared their reflections, response rates were much higher. I also usually recorded my observations and feelings about the meeting immediately afterward in a separate researcher memo. Finally, I posted the meeting video, related PowerPoint presentation, and readings as a thread in the Google Group for absent members or others to review at their discretion.

Following the introductory meetings, the group spent its time in collective reflection and inquiry, discussing our experiences at that current point in our lives and what our particular concerns and issues were, and formulating a shared group focus and questions to guide our work together beyond my research questions. Consistent with this Diplomat action logic, the group "energy" felt polite and careful. There was a slight air of skepticism as members waited to see what the group and the other members were about. There was also quite a bit of didactics and learning new language and information during this period as I wanted to equip everyone with a sufficient level of knowledge about the methodology so that they would have informed opinions about our work and we could consider and choose our interventions together. While this represented my intentional attempt to develop mutuality and share power by sharing knowledge, the group still felt very much like "my" group since members relied on me to shape the group and lead the process. In my positioning as the important, knowledgeable "leader," members would often email me separately with their questions or concerns rather than raise them with the group, even in response to group emails. To address this, I issued several requests and reminders to members to email the entire group with their thinking so that others could comment in an effort to build community. For example, as mentioned earlier, Ruth shared with me during a private phone call after one of our initial group meetings, that she was uncomfortable with the opening meditation through which I had led the group. In particular, she was concerned about my mention of the "third eye" as a physical location that I wanted to draw members to during a body scan. She felt that this term and concept conflicted with her religious beliefs. I hadn't realized that I had used that language (probably because it was second nature to me as a yoga instructor),

and I was thankful that she had brought this to my attention. I further wondered if others were bothered by it. However, I also noted that she did not feel comfortable raising this at the time in the group, even though I invited comments and reactions immediately after the activity. Other members had offered their reactions, including mentioning difficulties they had experienced during the activity. Additionally, other experiences and dynamics consistent with getting to know new people were present. For instance, Lily, who suffers from social anxiety, had strong panic attacks during the initial meetings and almost exited the group because of them. She did not disclose her anxiety to the group until a bit later but rather remained silent through much of our early meetings. Even Jessie was extremely engaged and seemed to fit in well with the group, a significant contrast with her later shift and behavior. Also, when she first began experiencing challenges with the group, she did not voice them publically but instead sent private emails to me only. As illustrated by the interaction earlier in the chapter, over time we moved out of the Diplomat action logic.

Expert and Achiever: Getting In Our Way

The Expert and Achiever action logics, respectively, follow the Diplomat action logic (Torbert & Associates, 2004). When working from an Expert action logic, individuals are primarily concerned with their craft's logic and with developing and exhibiting rational knowledge and expertise based on simple feedback-behavioral alteration dynamics. Moving from the pre-conventional stage into the conventional, individuals with an Achiever action logic have reached what is often considered self-actualization, or the pinnacle of adulthood. They are concerned with and can mostly manage their own personally defined values and objectives. That is, they can focus on the

interplay between goals, actions, and outcomes for themselves and for the teams and organizations to which they belong (Fisher, Rooke, & Torbert, 2003; Torbert & Associates, 2004).

The group moved through these action logics starting around June 2014, when members had a basic understanding of the approach and our initial shared purpose, and we began experimenting with actual interventions. Specifically, a few months after convening, the group moved into its formal action phase, and we began implementing interventions. We realized rather quickly, however, that we needed more time to engage this work fully. As mentioned earlier, to allow for more time for our interventions and to promote increased bonding and engagement within the group, we decided to add an additional meeting time during the month and to increase the duration of our regularly scheduled meetings by 30 minutes. This request was initiated by group members and marked the beginning of our collective movement into and enactment of the Achiever action logic—that is, recognizing a disconnect between desired goals and outcomes, and attempting to make adjustments. This was also the first formal assertion of power and agency by members other than me. However, several members were ambivalent about the additional meetings and were not sure if they could attend them regularly due to time constraints and the challenges of participating in the group.

In the process of working through this shift, Ruth exited the group due to stated time conflicts and difficulty balancing multiple demands. Her exit likely coincided with our movement into action—and the Expert and Achiever phases—which required more effort and commitment to the group than what she was prepared to give. Upon further reflection afterward, I realized that she wasn't really invested in the group from the

beginning. She had felt "called" to participate or that she *should* do it for her spiritual benefit, but she did not seem truly invested in doing the work or relating to other members; it was not a priority for her. She was often hard to reach between meetings, and she was usually the last to respond to requests. At the time, I found her exit ironic because she had suggested and provided the structure for one of the first interventions, the personal 360 assessment, which she said that she was planning to do individually. As I discuss in more detail later sections, I believe that Ruth met her developmental edge in not being able to commit fully to the work of her own development. However, because we were still early in our process and had not yet developed full capacity to recognize and name our developmental edges, and because we had not fully established our connections to each other, Ruth's exit had little effect on most members. This was in stark contrast to the effect Jessie's exit had on the group.

In addition to losing our first member, we struggled in our early efforts to deepen our interpersonal and practical work with each other. In fact, this deepening, or movement down the path, stirred up its own unanticipated challenges. Specifically, we found ourselves bumping up against our developmental edges, which manifested in both overt and covert ways, some of which were recognized and others not. The surfacing of these developmental edges sometimes triggered emotional and/or literal withdrawal from the group. The specific, unanticipated challenges that arose included: members' competing priorities and/or minimal engagement between sessions; emotional triggers such as individual irritations and frustrations with the group process; confusion about the nature of the group's deeper, developmental purpose and process (i.e., staying at the concrete, instrumental level); and fear and ambivalence about the group's work. Each of

these developmental edges are explored briefly in the following section as part of our

deeper story. Incidentally, these were all issues or derivatives of issues that brought

many of the members to the group in the first place; yet, we sometimes failed to

recognize them as such in the moment.

  Competing priorities and disengagement. Various members of the group

encountered challenges juggling the deep work and demands of the group with other life

commitments and priorities. For example, Ruth decided to leave the group because, as

she said, she was too busy to engage in the group's work between sessions. She initially

espoused a deep commitment to the developmental work of the group since it was tied to

her personal developmental and spiritual work. One of her stated challenges was staying

focused on what mattered to her and not sliding back into old, maladaptive behaviors,

despite knowing better. Ironically, her primary reason for joining the group ended up

being her stated reason for leaving. In talking to Ruth, almost a year later after the

study's conclusion, about her experience in the group and her subsequent learning over

the past year, she acknowledged that underlying issues rather than just competing

priorities resulted in her exit. She said:

> I can see where the group was an answer to a prayer, but because I allowed time
>
> and these internal struggles to take over, it's like, you know what? [I said to
>
> myself], "We going to abandon this issue here and we just going to move on."
>
> But then the issues that initially drew me to the group were still there. So, and
>
> like I said, when God began to deal with me [after leaving the group], I was
>
> reminded of different opportunities. Because I could have dealt with this—dealt

with this stuff, and where I had tried to deal with this stuff before but had never

gone deep enough, long enough for it to be unearthed.

This statement reveals Ruth's subsequent understanding and acknowledgment of

her unconscious avoidance of her developmental (and spiritual) work when her

experience in the group became uncomfortable. While she may have had some

awareness of her discomfort in the moment, she did not express this at the time, and her

stated reasons for leaving were purely practical. Incidentally, I had raised with Ruth my

concerns about her actual reasons for leaving and offered that she might be slipping back

into the very patterns of avoidance that brought her to the group. She acknowledged that

that was indeed a possibility and took a weekend to reconsider her decision to leave. In

the end, she concluded that this was not the case and that she truly did not have time to

engage in the group.

While most members attended sessions regularly, were extremely engaged during

sessions, and opted for increased meeting frequency, it was difficult to keep members

engaged in the work between sessions, which was partially what prompted the suggested

increase in meeting frequency. These concerns, as well as questions about how we might

deepen our work together, arose rather early in the group.

Emotional triggers. Participating in the group was also emotionally triggering

for some members. As mentioned earlier, Lily, who suffered from social anxiety that

was at the center of much of her then-current life difficulty and was part of her reason for

joining the group, had anxiety attacks during a couple of the initial meetings (which we

were unaware of given the virtual nature of the group). After several meetings, she

shared her experience with the group, which helped to explain her extended silence during some of the meetings. In one of her posts, she wrote:

> After our last meeting I was upset. I became very anxious during the meeting and had to step away. I was already anxious before the meeting because of work. So being vulnerable in a social setting with women I'm still getting to know pushed me to my limits. I don't know if anyone else has difficulty being open in the group. I'm hoping that my social anxiety will improve as we get to know each other better. As we move forward, I'll be figuring out the balance of pushing myself to be open for growth purposes and respecting where I am. That being said—I also appreciate and am grateful for the opportunity to witness and learn from your experiences as well as having the space to share my own.

The group was also triggering for me as I struggled to manage multiple roles and perspectives, as both the convener/facilitator and a participant. At times I wondered if I was facilitating the group "properly," if I was "doing it right." Additionally, I worried about the progression of the group and about whether or not I was conducting the research aspect of the group rigorously enough. This resulted in hours of over-planning and anxiety around the content and process of the group meetings. These concerns about competence mirrored concerns that I experienced outside of the group as part of my developmental struggles.

As illustrated earlier, Jessie suddenly became very critical of and irritated by the group and its process. She was concerned that we were spending too much time in inquiry and reflection and not enough in action, even as we had begun to enter our

intervention phase. One of her post-meeting reflections illustrates her concerns. She wrote:

> We reviewed results from the [two] interventions—discussion was nice but then felt like we are not getting the punch line (i.e., how do we then turn the findings into personal development?) … Still feeling frustrated about the long process of discovery and I am not alone. We are indeed doing interventions, but these interventions are in fact discovery exercises (I think Mimi or Danielle pointed that out during the meeting) … Seems like we are still in the process of finding out what's wrong with us (e.g., goals, barriers, etc.), and the next intervention should help us find out what causes these barriers/blind-spots (e.g., assumptions, expectations, etc.), and then how to eliminate these barriers/blind-spots. Need a clear roadmap on how to get from where we are to where we want to be.

Interestingly, and perhaps not ironically, Jessie became frustrated with the group and its process precisely when it began engaging in more active intervention work. However, as revealed in her post-meeting reflection, she did not consider reflective exercises or interventions that merely involved exploration of our emotional and psychological landscapes (e.g., U-journaling) action or outcome-oriented enough. Additionally, she felt that the pace of the group was too slow. When asked what we should be doing instead, she was usually not very specific, other than suggesting that we explore more concrete problem-solving strategies and make more efficient use of our time. She was clearly bumping up against her developmental edge of wanting concrete outcomes and movement even though she was not exactly sure what she wanted. Her earlier posts and comments were very positive, and she expressed enjoyment of the group discussions and

synergy with the other women's experiences. She may also have been externalizing her frustration with her own seeming lack of concrete movement (as expressed in earlier discussions) to the group. Finally, Jessie's frustration also reflected a deeper disconnect around the developmental work of the group, which she directly questioned in another reflection. She was not alone in this as the group continued to grapple with engaging transformational rather than instrumental learning, a struggle that many of us experienced in our lives overall. As seen in the earlier email exchange, other members attempted to name this developmental edge directly for Jessie; however, she did not agree. Her last email seemed to suggest a concession or some recognition that her experience may have reflected a developmental edge, but she was content with her stage of development and chose not to develop any further at that time.

Fear and ambivalence. Further into our group process, some members explicitly articulated feelings of fear and ambivalence about the group's work, wanting to remain committed to the group while also wanting to avoid the group's work. In these moments, we were able to recognize how seemingly unrelated and reasonable constraints, such as limited time and competing priorities, were also employed as strategies to avoid developmental work. Lily and Danielle made direct statements to this effect at different points. Witnessing Jessie's developmental edge also provided us with a mirror onto our own edges, helping us to see how our fear and ambivalence might have been manifesting. I explore this issue in more detail in Chapter 5.

Emotional triggers, relational issues, and time constraints are not unusual occurrences when convening a diverse group of unfamiliar, busy, high-achieving women to examine their consciousness, including areas of "stuckness" and ineffectiveness.

However, the way in which these seemingly reasonable challenges reflected our self-reported ineffective or maladaptive behavior outside of the group, as well as members' initial inability to recognize and address them as such when they occurred, was unexpected. These experiences or developmental edges served to mask members' ambivalence and fears about the group's developmental focus in ways that were usually evident to other members but not to the woman experiencing the challenge. Additionally, many of our developmental edges were consistent with the limits of the members' current stage of development (as measured by the GLP). Participation in the group required us to collaborate in building a mutual community of co-inquirers, determining how to work together within our own and each other's needs and perspectives, and exploring a space of vulnerability and ambiguity outside of our comfort zones and ways of knowing. These actions typify the core capacities of someone with a post-conventional action logic and necessarily prove challenging, even threatening, for someone who makes meaning at a late conventional level, which privileges independence, knowledge and expertise, and goal-oriented action. Given that all of us fell somewhere between the conventional and post-conventional stages, our group process likely challenged the limits of our collective and individual meaning-making capacity.

This speaks to a paradox or polarity that emerged in the group around a desire for personal development and a commitment to the group on the one hand and a fear or avoidance of development and commitment to the group on the other. However, this fear and ambivalence usually manifested covertly as disengagement due seemingly to lack of time, irritations, and emotional triggers. As such, these covert manifestations functioned as blindspots and developmental edges for group members, making them difficult to

recognize, name, and address. Furthermore, they often hindered members' engagement with the group and thus the group's overall progress. In this way, seeing triggered fleeing. We came together through a sincere desire to see ourselves, and yet that seeing triggered allergic reactions to the group, causing some of us to flee from or distance ourselves from the group at some point—usually in ways that were unrecognized yet emblematic of our usual patterns of shutting down in the face of fear and uncertainty. This experience resulted in some members literally leaving the group permanently, especially if they were not able or willing to recognize and confront their developmental edge. In this way, we got in our own way. Over time, the group developed individual and collective capacity to better recognize and name these developmental edges. Much of this came as a result of seeing and naming other members' blind spots and developmental edges, which were usually more apparent than our own. In this way, members were able to recognize how ordinary challenges functioned covertly to mask fear and ambivalence. Once recognized and acknowledged, this knowledge could be employed in our subsequent work together.

Redefining: Listening into the Dark

The Redefining action logic marks the move from the conventional into the post-conventional. Individuals operating under a Redefining action logic enters an often destabilized world in which their reliance on their own personally defined and achieved success and personally defined values are not enough. They can challenge the once unquestioned notion of their own values as valid and absolute, and begin to see and experience their own shadow more acutely. They also become more systems-focused and

interested in the interplay between the self and others. The group entered this phase around August or September 2014.

In retrospect, our experience of engaging in our usual tactics of taking action and meeting our developmental edges around this action was extremely important for our group process and functioning. It helped us to begin illuminating our consciousness and shadow. It provided the necessary tension that took us deeper into our work. We had developed enough trust in the group and realized that our strong Achiever way of being would only get us so far, especially in this context. During this phase, we began viewing the group more as a system and ourselves more in relationship to each other. It is hard to say for sure what got us to this point, but viewing our GLP results as well as Jessie's exit, including the communication around it, were important triggers for this movement. In addition, one of my dissertation committee members challenged me around all of the actions and interventions that I had planned for the group and encouraged me to begin viewing the group as a system rather than as just a group of individuals. This was an extremely helpful intervention for me and the group. It shocked me out of my experience and fears of incompetence and my need to fill the space and ambiguity emerging within the group which were pushing me up against my own developmental edges and testing my capacity as a facilitator. Indeed, Jessie's irritation and challenge were particularly triggering for me, in multifaceted and layered ways, and related to my own personal competence, frustrations with the group and its process, and attachments to the group "succeeding" or functioning in a certain way. I was also frustrated by what I perceived as Jessie's lack of understanding of the overall group focus and process, and her lack of self-awareness or self-inquiry, as well as my seeming lack of competence to intervene around

it. Paradoxically, I also saw her frustration and efforts to intervene as healthy for the group development and process, and as a display of increased mutuality between us. Ultimately, my frustrations were related to my concerns about my own limits and capacities to facilitate this inquiry and manage the complexities of it. They stemmed from concerns about my ability to convene a group focused on transformation while I struggled with my own transformations. I was not an expert or in my comfort zone. It also surfaced that Danielle was having similar struggles and triggers around Jessie; I received two separate phone calls from her about her frustrations.

My initial approach to these challenges, as convener, was to remind the group (and especially Jessie and the other triggered member) to question everything, to consider interventions that spoke more directly to where we were developmentally and that could better help us scaffold these developmental challenges, and to redirect the group to consider our purpose and work (which was not concrete, linear, or purely instrumental). I also used this trigger to identify where I was meeting my developmental edge and encouraged the other group member to do the same, asking again and again, "Why is this a trigger?" In many ways, I began seeing these challenges as a sign of health and progress. After all, wasn't this the work of the group, to peer into our own consciousness and illuminate our blind spots and shadows? In that sense, everything was fuel for development and warranted inquiry. The work and path of the group was speckled in both light and shadow. As we travelled deeper into our core work and met ourselves and brushed against our developmental edges, we experienced polarity—both the joy/light and pain/shadow of moving closer to the "truth," of illuminating that which is hidden. Some of us wanted to peer deeply, others wanted to look with one eye closed, and still

others wanted to turn away. It was all happening. Our individual and collective work was to try to catch ourselves in the act.

Eventually, Jessie's irritation with and disengagement from the group became too acute, resulting in the exchange presented in the beginning of this chapter and her eventual exit. Like Ruth, she was not able or willing to move fully into the next stage of development with the group—in this case the Redefining stage—although she had capacity for it. It likely felt too risky and destabilizing for her. However, through this experience, we were able—for the first time—to name these developmental edges and determine how they simultaneously were triggered by, could threaten, and could illuminate our work. As mentioned previously, learning the results of our GLP assessment also proved to be an important step in our group's development as we learned that we are all, as a group, in similar stages of consciousness. This allowed us to see our collective challenges and work, and to consider how we should move forward in light of this. Through this and the interaction around Jessie's departure, we realized that the group was moving into a deeper level of engagement, functioning, and support of one another. Additionally, the group was developing a more acute understanding and awareness of the work we were engaged in, which created a renewed sense of excitement about and commitment to the group. We also began reframing how we saw the group, a change aided tremendously by my new understanding and conceptualization. No longer were we just a collection of individual women who had come together to look into our consciousness; we were a system reflecting its own "stuckness" and issues. In this way, the group could be used to not only illuminate our developmental edges but also to mirror and practice new ways of knowing, being, and acting. It had only taken us 10 months—

almost the entire time of our group functioning—to come to this! As a result, group members decided to continue the group after the planned end date of November. Rose stated powerfully the rationale for this decision during the last group meeting:

> I think it's important that we think about how long it took for us to establish a community within our group and I feel like we had some discussions on this. I don't know, maybe it was around September—when we started to develop a different kind of cohesion, and I think part of what pushed us toward that different level [was], if I remember correctly it was … with Jessie leaving and there were some sort of things that the group had to confront together that pushed us into a position where we had to interact emotionally between ourselves and in [a] different way. And so it wasn't just from the theories and the strategies that we were learning that [Shakiyla] was presenting to us and that we were observing in terms of the academic component of evolution of consciousness. But it was actually the nitty-gritty of the dynamics and—in the development of the dynamics that provided at least partially a platform for us to be able to take our conversations to the next level.

Rose's quote represents an acknowledgment of the group's shift and improved functioning, and of how Jessie's exit provided a trigger for the group to engage more personally. It also highlights how the second-person space benefits the process of a group like this. As such, the personal engagement provided by this moment both created an opportunity for and expressed our increased commitment to and investment in the group. We were finally putting "skin in the game," so to speak. We also realized that up until that point our work together was preparation for what we considered our "real"

work, or rather our next developmental frontier. This next phase would require the development and practice of new capacities or "listening into the dark" (Torbert, 2013), both a developmental edge and challenge for this group. *Listening into the dark* is a phrase coined by Torbert (2013) and used by Aliki during her debriefing with us. It describes the practice of action inquiry, of simultaneously holding oneself in a space of inquiry, ambiguity, and alertness to sense and intuit what is "true" in that moment, and then using this sensing and attuned awareness as the basis for timely, mutually transforming action within oneself and with others. It requires the capacity and willingness for interplay among different territories of awareness, for engaging the unknown and uncertainty, and for illuminating that which is hidden. This was the place that we were being called to as a group. Mimi described her understanding of this new work and its potential:

> [Related to] my write-up that I sent you guys about feeling inadequate in my job and feeling very insecure, it's interesting that this conversation [with the group] happened when it did because I had a glimpse in my work week as far as a little bit of what's going on with me. But in my work week, I [also] had a glimpse for myself of almost letting go … almost letting go and feeling a little bit more comfortable saying, "This is where I am and I do not need to push." So this conversation and Aliki's analysis of where we are as a group, I think was spot on for me in demonstrating that we are on the cusp of doing some pretty amazing work, and I'm really excited about just discovering this together. And discovering our own vulnerability and those shadows and, what was the phrase? *Listening into the dark…Listening into the dark*….I want that to be my mantra.

[LAUGHTER]. *Listening into the dark*, because I do believe that our environments are key to that, as she was describing, and I feel like this group has the potential for me to listen to that darkness with openness. And if it wasn't for this group, I don't think I'd be able to do that.

This statement reveals the new opening and possibility that Mimi found by engaging with ambiguity and listening into the dark. It also describes the importance and benefit of community (e.g., the group) in supporting this process and growth. Later, Mimi advocated for the group to continue its work past our initially contracted period so that we could capitalize on and enact this new understanding and budding capacity to listen into the dark.

In summary, this is the story of the group's developmental arc from Diplomat to Redefining. This movement was extremely complex and challenging work, both methodologically and personally. It required intellectual and emotional astuteness and attention that was sometimes beyond our collective capacity—and certainly beyond my own developmental capacity as the convener and primary facilitator. However, we did move deeper into our work together, even though it took almost our entire time together to get to that point. As described in more detail in the next chapter, the methodology of CDAI was extremely well suited to our aims and desired outcomes. However, CDAI is as much about the journey and process as it is about any outcome. In our journey, we were always on the edge of our own understanding and knowing, and figuring out how to act within that awareness. This was our work, within the context of this inquiry and outside of it, as I am ever coming to understand it—the "continual, existential, relational searching for how to act and interpret and envision action" (Torbert, 1999, p. 191). In the

next chapter, I move deeper into our story, describing the results of our action inquiry and

my meta-learnings around them.

CHAPTER 5

FINDINGS

I seek understanding rather than truth, I honor context as constitutive of meaning, I recognize that our data capture but one snapshot of experience out of an infinite array (Scheurich, 1995), and I realize that I am an author of what is learned from a study.

—Greene, 2013, p. 750

This quote speaks well to my current understanding of and experience with the data created from this inquiry and my sense-making of them. It provides an apropos introduction to this chapter, which is less a presentation of resolute and absolute "findings" and more an interpretative dance called forth from listening into the dark (Torbert, 2013). Again, this is my candid and transparent acknowledgement of the messiness of the sense-making process and experience of radically subjective, first- and second-person qualitative action research. It is simultaneously consuming and plodding, elusive and slippery. My experience and view of this inquiry's "findings" is that they were not waiting "out there" for me to discover tucked away in the typed lines of my transcripts and researcher memos. Rather, I have had to coax understanding out of these data and construct meaning from them intuitively using the trail crumbs of theory and other useful support structures. This is a crucial disclosure and nuance, that I have created the meaning of these data as much as I have gleaned meaning from them. That is, my reading and interpretation of the data created the "findings" that I present in this chapter. They do not exist "out there" on their own. I am bound to them and they me; we

are inseparable. They would not reveal themselves to someone else in the same way; another person would craft a different story from the same typed lines of data.

In light of this important framing and disclosure, instead of "findings," I offer the following learnings and insights about this inquiry. As a co-participant and co-researcher in this inquiry, my understanding derives as much from my own lived experience of the group as it does from my reading of the data. I relinquish all claims of objectivity. Additionally, as mentioned earlier, given the many stories that I could have told about this inquiry and the multitudes of data it produced, I have chosen to privilege the second-person story, or rather the story of the group, even above my own first-person narrative (although this entire document is essentially my first-person explication of the second-person story and third-person impacts of this inquiry). Where appropriate, I also share first-person stories relevant and essential to the telling of the collective story. As such, these are my first-person learnings about this second-person inquiry. As described earlier, they were derived, in part, and corroborated by the experiences of and discussions between my co-inquirers and me.

I do not present these insights as stable themes that hang together neatly around each research question. Instead, in keeping with the study's post-qualitative data analysis approach (Greene, 2013; Lather, 2013; Lather & St. Pierre, 2013), I offer my current insights and learnings along with interpretive support from the various theories and thinkers that have informed my understanding and the stories that illustrate my experience and observations, as appropriate. Sometimes I do this creatively in narrative form; however, for the sake of clarity and organization, I align my learnings with the research questions and thematic headers. In accordance with this approach, I present

thick quotations and participant exchanges accurately but in a slightly edited format (e.g.,

without typographical errors, speech stutters, etc.) for clarity.

There were 10 key learnings that grew out of this inquiry. Table 5 provides a

high-level overview of the learnings by research question. In the pages that follow, I will

describe and provide illustrations for the key learnings.

Table 5

Learnings by Research Question

Research Question	Learnings
RQ 1: Within the context of a CDAI group, what developmental supports and challenges facilitate the evolution of consciousness of women to more complex capacities and ways of knowing that allow for greater individual and social awareness and effectiveness?	Developmental Supports and Challenges **Learning #1:** Facilitation Key Features of effective facilitation: • Attention • Modeling • Facilitator Capacity **Learning #2:** Friendship and Connection **Learning #3:** Time Evolution of Consciousness **Learning #4:** Becoming Fatter versus Taller • Horizontal development is sometimes more important than vertical development **Learning #5:** Development in relationship is key for the self-authored knower • The move from self-authorship to self-transforming is best done in community and relationship
RQ 2: How does the context of a CDAI group serve as an effective holding environment for the evolution of consciousness?	**Learning #6:** Ways of Thinking that Hold • Developmentally focused action and inquiry • Mutuality **Learning #7:** Practices and Structures that Hold • Four parts of speech
RQ 3: How does a CDAI group function as a system, and how does it develop collective capacity to evolve consciousness?	**Learning #8:** Development of Mutually Transforming Power • The group began moving toward an enactment of mutually transforming power rather than unilateral power **Learning #9:** Members as Archetypes and Reflective Mirrors for Each Other • Members reflected different aspects of our individual and collective lights and shadows **Learning #10:** Managing Polarity and Ambivalence • As a system, the group experienced fear and ambivalence about the group's developmental work throughout the process that needed constant management individually and collectively

Research Question 1

Within the context of a CDAI group, what developmental supports and challenges facilitate the evolution of consciousness of women to more complex capacities and ways of knowing that allow for greater individual and social awareness and effectiveness?

At its essence, this question considers what type of facilitative actions help to evolve consciousness. There were two primary concerns to be considered and addressed in response to this question: developmental supports and challenges—which essentially comprise the holding environment—and the evolution of consciousness. Before presenting the specific and related illustrations of the learnings that surfaced, the meta-insight that emerged for me around this question was that my initial conceptualization of supports and challenges was more instrumental and focused on specific interventions and facilitative actions. This was not incorrect in a gross sense; an adequate holding environment is created through specific enactments and interactions of holding (both practically and figuratively). However, to mainly consider the holding environment and the related developmental supports and challenges instrumentally, as I mistakenly did at the outset of this inquiry, is to inaccurately represent the nature and function of the holding environment (and its related supports and challenges).

Such a conceptualization does not capture the subtleties of the holding environment or its energetic and experiential quality, which emerges through the relational spaces between people. It also limits considerations of developmental supports and challenges to more formal and structured interventions, which, in the case of this inquiry, turned out to be the least of the group's concerns. In fact, our and my initial desire for and overreliance on interventions and actions were extensions of a fear of

uncertainty and ambiguity, and reinforced our action logics.[10] My conceptual faux pas,

which my fellow group members willingly and easily sanctioned and reinforced, is

typical in and expected of the self-authoring, achievement-oriented mindset through

which we mostly made meaning. We all knew how "to do," but working within a space

of being and not knowing was outside of our comfort zone. In many respects, focusing

on action and instrumentality was our only pathway into an unknowable realm. That was

the initial action of our inquiry since we could not enact what we could not yet see or

understand. There were glimpses of this developmental edge that emerged in the group

as we considered the focus of our work. During one of our conversations, one group

member, Jessie, pondered on this insight:

> I keep thinking back to the … what is that? Action logic? ... Looking at the
>
> different ways of thinking and how that could play into our expectation of life,
>
> right? Just looking at the pattern here, I think the reason that drew us into this
>
> project is … I don't know whether it is a personality or something in our thinking
>
> that we want more out of what we already have. Otherwise we wouldn't even be
>
> interested in this project to kind of co-inquire [about] our evolution, right? So I
>
> think right there, there is the commonality in this group. I think it's interesting to
>
> explore that.

---

[10] Torbert (2004) presents eight action logics, which are essentially frames or orders of consciousness that represent and inform the way a person knows and takes action in the world. A person moves from earlier action logics to later ones over time as she or he develops more mental/emotional complexity. This movement represents what we refer to as development or evolution of consciousness. From the least to the most complex, the seven action logics most prevalent in adulthood and the focus of their awareness include: Opportunist – own needs and self-interest; Diplomat – social acceptance and belonging; Expert – internal craft logic rules, mastery, and rationality; Achiever – own personally important results, goals, and plans; Redefining – relativity, impact, and influence with others; Transforming – systems view, and process and goal oriented; Alchemist – transforming self and others, and interplay of awareness, thought, action, and effect. Adapted from Fisher, Rooke, and Torbert (2003).

Although we recognized that we had a tendency toward action and constant forward movement, some of the implications of this were hidden from us—including how it was informing our approach to our inquiry—and we carried on with our plans to explore facilitative actions to push our development. It was only over time, and through inquiry and external intervention, that we began to catch ourselves in the act of performing and reifying our current action logics.

My new understanding emerged as I poured through the hundreds of pages of data and considered and reconsidered my experience in the group and previous interpretive conversations with group members and others. While we certainly had no shortage of interventions and facilitative actions that we contemplated and even enacted in the group, those did not constitute the developmental supports and challenges that held us as we attempted to facilitate our own evolution. Within this context, the most crucial support and challenge for the evolution of consciousness was the intentional creation of a holding environment built on supportive structures and a "relational surround" (or social environment) that held practically and emotionally. Kegan (1982) refers to a holding environment as a "culture of embeddedness." This culture includes the various social, familial, and professional relationships and environments that serve as one's reference points and support and/or challenge one's current ways of knowing. This is a very different conceptualization of supports and challenges than my very instrumental one. However, while Kegan addresses the importance and functions of cultures of embeddedness, he speaks little of how to create them intentionally or practically in service to development. Generally, he focuses on cultures of embeddedness or relationships that speak to and affirm the person exactly at her or his current order of

consciousness, while also challenging the individual toward the next order of consciousness as needed (Kegan, 1994). Our group fumbled its way into determining the supports and challenges, or holding environment, needed to evolve.

Josselson (1992), whose work focuses on the relational spaces between people and the importance of relationships in human lives and functioning, provides another way to consider and conceptualize holding environments. Specifically, she argues that holding is a primary human need, a key dimension of relationship, and a prerequisite for growth. Using psychological theory and her own research, she posits that holding starts as literal holding by one's parents in infancy and childhood and develops—as the person develops—into more symbolic and emotional forms of holding. Holding represents "thereness," emotional support, "ground," and protection. Josselson also describes the use of meaning systems as forms of holding beyond actual people and the need for transitional objects of holding as people change meaning systems. This has particular relevance for this inquiry as our frames of mind or action logics also could be viewed as qualities that held. This adds perspective to the loss and resistance that may arise as one struggles during development to replace old meaning systems with new ones. Josselson further asserts that holding serves as a boundary or control buffering the individual from the fundamental groundlessness and openness of life and the lived experience, which feels too vast and scary, akin to the experience of falling. In this way, holding offers safety and a metaphorical container in the form of ground and arms (or "arms-around"), protecting one from falling. However, this structure must be flexible and malleable at the same time that it is stable in order to allow for the growth and experimentation of the person—present and strong but not confining or rigid.

Josselson's (1992) conceptualization of holding integrates well with, supports, and extends Kegan's (1982) notion of the holding environment as a culture of embeddedness that "holds on, lets go, and sticks around" (Kegan, 1982, p.121). Both describe structures that are supportive and provide the ground and stability for growth. They also reference human relationship and interaction as the primary levers for the enactment of these supportive and grounding structures. Kegan focuses on the holding environment and its function as a developmental bridge, while Josselson focuses on holding and its role in human functioning and relationship. Both offer a way to consider and make sense of the supports and challenges that provide the conditions for evolution and development. Certainly, the metaphors of "culture of embeddedness," "bridge," and "arms-around" provide a context and frame for my expanded, more symbolic thinking about the developmental supports and challenges that were present (or not present) in our group (Josselson, 1992; Kegan, 1982). Specifically, I conceptualize developmental supports and challenges more as the ground and arms that held us and kept us from falling completely as we entered the wide-open space beyond our current (ways of) knowing. As such, from here on, I speak about developmental supports and challenges as forms of holding and as features of the holding environment.

Developmental Supports and Challenges

While my conceptualization of the supports and challenges for development expanded beyond thinking of these as specific interventions and facilitative actions that evolve consciousness, there were specific elements of the group process and practice that created the conditions and ground for development. In this section, I present my learnings and insights about what developmental supports and challenges mattered and

helped us, or rather what conditions tilled the soil for consciousness to grow. As

mentioned earlier, our developmental supports and challenges (or facilitative actions)

turned out to be those that held us practically, cognitively, and emotionally. Some of

these we discovered through their absence or through our struggles with them. These

included the facilitation of the group and the development and emergence of friendship

and connection. While not a support that our group benefited from, time also emerged as

an important condition for evolution. There are other developmental supports and

challenges that encompassed the holding environment, such as our developmental focus

and collaborative approach; however, those were key features of the CDAI method and

are presented as part of research question two.

Learning #1: Facilitation. One unexpected learning was that facilitation, or the

holding of the holding environment, matters. It was a crucial feature of holding the group

practically. As I reviewed the meeting transcripts, especially the earlier meetings when I

was feeling most insecure and incompetent in my ability to convene and facilitate the

group, I was struck by the level of care and diligence that I put into the group. I

remember that I would spend days and hours before each meeting a dry-mouthed nervous

wreck creating annotated agendas with detailed scripts for myself (see Appendix G),

along with PowerPoint presentations for the group. I wanted to make sure that our time

together was structured and purposeful and that the group was well informed. I also was

afraid of the wide-open space and ambiguity of the group that needed to be filled.

Additionally, I was still learning and exploring the theories and method for myself and

was not completely sure that I knew enough to lead and hold space for the group or to

effectively translate and transmit what I did know to further invite the other members into

my vision to share power—a critical component of the method. I had convened these women and did not want to waste their time or leave so much space and ambiguity that we would become untethered. As discussed in other sections, over time I grew more comfortable with my role and I did not need to hold the group as tightly. That said, my fears, along with my more structured facilitation style and hyper-vigilance, caused me to take great care with the group and its facilitation in a way that served us well.

While I was not always skillful at facilitating the group, I was extremely intentional and thoughtful about the group, its functioning, the individual members, and my facilitation. At the time, I did not fully appreciate how this held the group or its impact on our functioning. In considering my facilitation of the group, and through conversations with and feedback from group members, there were several aspects of the facilitation that likely had the most impact on the functioning of the group and the creation of a holding environment. These included attention, modeling, and my developmental capacity. I describe these here with accompanying illustrations and theoretical support, where relevant and available.

Attention. As mentioned earlier, as the convener and facilitator of the group, I placed a great deal of focus and attention on the group, how it was functioning, and each member. I felt responsible for the group, and I cared about it. I reflected on it, journaled about it, and talked to others about it. I metaphorically held the group so that it would not fall. I paid attention to what was happening in the group so that I could address issues as they arose and adjust my strategies as needed and appropriate. Practically, this attention or attentiveness took the form of checking in with members, especially disengaged or struggling members; sending well-thought out and carefully crafted reminder and follow-

up emails; keeping the group process moving forward through timely scheduling (which was a challenge given everyone's busy-ness and the different time zones we lived in) and the development of organizational structures (e.g., group listservs and discussion groups, record-keeping platforms, etc.); organizing and collating information from our initial interventions; and serving as the group secretary and historian. In addition to some of these more instrumental supports, I also paid close attention on the developmental purpose of the group, how we were enacting the CDAI method, and the creation of mutuality among us (i.e., how I was sharing power). In all honesty, I did not have full capacity to facilitate this group and inquiry given its complexity and all that was required. It was a lot of effort, and I constantly felt at my growth edge; however, it was my care, attention, and diligence that helped me grow into my ability to facilitate the group and hold the holding environment. Admittedly, there is also some minimum amount of capacity and skill, which I possessed, required for holding a group such as this (to be discussed in more detail later). The following email provides a rich example of the level of attention I paid to facilitating the group:

> Hello All:
>
> I hope that you all enjoyed the long holiday weekend. Jessie and Ruth, we missed you and there is much to catch up on! Jessie, I hope that you are feeling better. Below is a summary of and follow-up to what was discussed during the meeting and outstanding items—the meeting recording has been put on Google Groups:
>
> 1. We realized that our current shared questions do not adequately capture the larger scope of the group's developmental focus and work (examining our current level of awareness/consciousness/ways of knowing and the facilitation of its development AND how we as a group are attending to and facilitating the evolution of our own and each other's consciousness). As such, we would like to add in a question that captures this larger scope so that it does not get lost in our other, smaller questions, which are:

a. What are our blindspots?
b. What's keeping us stuck?
c. What are the best conditions (both supports and developmental challenges) for our development/movement (through our stuckness)?

The last question was modified by the group to be clearer and more succinct. Any suggestions for an additional question that captures our larger focus are welcome. I will take an initial go at it on the Google Group for all to respond to, but I also invite others to do so. Please attend to this.

2. We are all in agreement about moving forward with our first two interventions, which will be implemented in June. Specifically:

a. We will conduct the personal assessment/360 that Ruth suggested. As a group, in the next 1-2 weeks, we will make any modifications in wording/introduction and finalize through Google Docs. Once finalized, we will send out the assessment to our pre-identified people (see point number 3 below for more details about this) for them to complete by June 28th so that both processes are conducted simultaneously. We discussed using a Survey Monkey process for this for ease of administration and compilation of results. I would say that respondents should have at least 2 weeks to complete.

b. We will also engage in a u-journaling process as a group during our next meeting, June 28th, which I will facilitate. We may need to extend the next session by an additional 30 minutes to make sure that we have adequate time, but we should discuss this further.

3. The group would like to have a call/meeting in the next 1-2 weeks to finalize and discuss the launch of the personal assessment. Specifically, group members wanted to make any final revisions/edits, discuss who we should choose to provide feedback, and discuss how we will support each other through the processing of the results. Please respond to the following doodle poll to choose a good date and time that works. I tried to be mindful of work schedules and time differences, but it was a little challenging. Let's see where we get with this:

a. http://doodle.com/4qbw3v6579re6gx9

4. Several group members are concerned that our current once per month, 2 hour meeting schedule is not enough time to build trust and relationships within the group to support the deep and personal work that we want to do with each other. Members are also finding it difficult to stay engaged in our work and connected in between sessions. As such, we would like to add an additional meeting onto our current meeting schedule – perhaps a 1- 1.5 hour meeting in

addition to the 2 hour meeting.   Most members have availability and willingness for this. Ruth and Jessie, what are your thoughts about this?

As illustrated by this email excerpt, I attended to several aspects of the group's functioning as the facilitator, and many aspects of the group needed attention at any given time. Specifically, not only was I the recorder and historian of our process, but I also served as the scheduler—to keep us on track—and helped capture and frame group discussions and decisions. This excerpt also illustrates how I balanced leading the group with inviting mutuality and shared decision-making.

Arguably, this level of attention was not necessary; it might even have been limiting. Indeed, it is possible that, early on, I could have given members more responsibility for the functioning of the group, which may have sped up our development of mutuality. Eventually I relaxed some of my hyper-vigilance around the group as I grew more comfortable with my role and the ambiguity of the group's work.   However, I do believe that a fairly significant amount of attention, holding, and vigilance in the facilitator's role is necessary to maintain groups like this, particularly in the beginning and during key transitional times or difficulties. The facilitation of a group is also important to consider precisely because it can be taken for granted and not adequately addressed to the detriment of a group's functioning. Not only did my attention and attentiveness provide other members with the experience of being held through sometimes challenging work—which triggered allergic reactions, avoidance, and disengagement—it offered important support and structure that partially buffered the ambiguity and complexity of the group's work. Members spoke about their experience of the facilitation and recognized it as a service on behalf of the group. One member, Lily, shared in a post-meeting reflection, "[Shakiyla], I feel like you've been doing an

excellent job facilitating and am grateful for all that you've done in moving our group forward, especially since I haven't had a clue."

Further confirmation of the importance of facilitation and keen attention to the group came during the second phase of the group, after our initial group process ended. During this next iteration, Mimi took over the facilitation role for the group. I tried to be thoughtful in my transition of the role, knowing the amount of holding required to sustain a group such as this. Specifically, I facilitated our first couple of group meetings during our transitional period as we determined how we wanted to move forward; I sent Mimi detailed instructions and notes about how I facilitated the group and key actions to pay particular attention to; and I led the group through specific demonstrations of our initial intervention while Mimi formally convened and facilitated the group overall. Mimi was able to successfully transition the group onto a new video conferencing platform and schedule and convene a couple of the initial meetings. Soon after the transition, however, it became clear that Mimi was struggling to stay ahead of the group's facilitation, particularly around checking-in, keeping the group focused and on-task, and sending out meeting reminders in a timely fashion. Her engagement of the group dropped off significantly until finally we did not hear from her about the group for months. After a long silence and no group activity, I emailed Mimi asking her to connect with the group and at least formally close out our work together. Below is a portion of the message that she sent to the group's Whatsapp chat:

Hi ladies! Sorry it has been several months since we last connected…Ladies, I am also reaching out to apologize for my failure in keeping the group going. I really

underestimated the level of work to really run things and dropped too many balls.

I am sorry for not being able to lead as I had hoped and ask you all to forgive me.

In the full message, she requests time to meet as a group to discuss the way forward. I was the only member to respond in a timely manner. Lily responded a week later, and Rose did not respond at all. This excerpt demonstrates not only the importance of the facilitation of the group but the amount of effort and attention that it required.

Modeling. My intentional use of modeling was another aspect of the facilitation that supported our work. Specifically, I worked to model the type of action and interaction suggested by CDAI, such as using the four parts of speech, practicing mutuality, and naming and inquiring about group dynamics that came into my awareness. Not only did this serve as a developmental practice for me, but it also provided the group with illustrations of the concepts we were discussing and invited them to experiment with different actions. The following examples illustrate my use of modeling to both challenge the group and move our process forward. The first example is excerpted from the interchange among the group members and Jessie just before her exit (presented earlier in the case study chapter). I offer it here again to point out a specific aspect of the communication. I wrote:

So, in the spirit of our group's work of being vulnerable and open with each other, and learning to provide challenge and support for our own and each other's benefit, I would like to share my disappointment that you were not at Saturday's meeting. It was a key meeting featuring an invited guest who made time in an extremely busy schedule to support our work. Additionally, the discussion was a

rich and important one that I think you would have benefited from immensely and to which your presence and energy would have greatly contributed.

My intent here is not to put you on the spot or convey that we have to attend all meetings or that we don't have choice in when we attend meetings. However, my hope is that we privilege the work (particularly the meeting space) of the group to the best of our abilities for the limited moments that we have together. I also want to convey that you are a valuable member of the group and bring a unique perspective and that your absence is felt and missed. It is particularly missed as we begin to deepen our connections to each other and our work together, especially as much of the work is about the relational space created between us, which cannot be created through email or captured in a recording. I also think these are relevant issues for us all to consider as we move forward with our work together, which is why I am raising them publicly. I wonder if you, or others, have any thoughts or concerns about anything that I have raised here.

Not only did I explicitly state my intentions to model the work of the group, but I also used this as an opportunity to invite other members to engage in the work of the group, which they did. In fact, as mentioned earlier, this was a key moment in the group; however, it may not have occurred had I not initiated it and explicitly named it as an important opportunity in our practice. Other members stated later that they only addressed the moment in service to the group's work since it would have been more comfortable for them not to have addressed it.

Another form of modeling was my demonstration and use of the four parts of speech (a CDAI second-person practice). As we explored the four parts of speech, a

group member asked me to provide examples of how I have used the parts speech and seen them used. I offered an example of an email that I had previously written to the group, explicitly illustrating my use of the four parts of speech. The following email in response to Mimi's "open journal" about her difficulty adjusting to a new job exemplifies my use of the four parts of speech along with other features of the CDAI method. I note in the passage where I used each of the four parts of speech. I wrote:

I also would like to notice and thank you for enacting a rare and newish move in our group—unsolicited, proactive journaling about a challenge you are experiencing, as well as for yourself—journaling period, which I know is not your favorite thing to do. Brava! …

In keeping with our developmental focus, consideration of your current and fallback action logics surfaced for me [FRAMING]. Specifically, I am wondering if the stress and uncertainty/newness of this transition is triggering your Achiever mindset/action logic (or even an Expert mindset), which is all about doing versus being, needing to know, perfectionism (Expert), self-criticism in the face of not meeting our own self-authored principles and ideals (more achiever), and concerns about competency. Viewed from a developmental perspective, I wonder if you can take it easy on yourself and rather practice/experiment with a more inquiring (rather than action) stance/perspective that allows you to see this as an opportunity to simply witness yourself (assumptions, behaviors, etc.) in action [ADVOCATING]. I would say that this relates both to your judgement of your work performance as well as your judgment of/frustration with yourself for not living up to your own principles ...

for not being "better than this." This is your achiever action logic struggling to maintain itself [ILLUSTRATING] …

Just creating this gap, through gentle inquiry, observation, and compassion around your action logic (and the related underlying assumptions and ways of knowing) rather than doing/efforting/judging is good enough and a developmental move/shift for you and those of us who get trapped in the achiever mind-set. However, perhaps you could go further and even recognize and challenge the limits of your conception/principles of competence and leadership.

Is it possible that you can just BE and feel exactly where you are at this moment in time without needing to do anything about it?

What are thoughts about this? [INQUIRING]

Thanks again, Mimi, for your deep sharing with us. Courage, gentleness, and patience on the path … and with yourself, my friend.

This example has multiple layers. It serves as an example of modeling CDAI's second-person practice of the four parts of speech, and it also demonstrates my use of the method—at times subtly—in my engagement of the group. Specifically, I weave considerations of the developmental framework and language into my advocacy and illustration as a way to make visible Mimi's potential experience of fallback—a temporary regression to an earlier action logic or stage in the face of stress, ambiguity, or uncertainty. This explicit naming was also meant to model our work of challenging each other and illuminating our shadows.

Facilitator capacity. Different from but related to the previously discussed aspects of group facilitation is the facilitator's developmental capacity. I believe that the

facilitator's capacity matters both in terms of her or his developmental stage or meaning-making capacity and her or his actual capabilities or competencies as a facilitator. Indeed, one's skill and experience in facilitation makes a difference. For example, the ability to elicit discussion and pose questions rather than dominate a conversation, to create a welcoming environment for all members, to pay attention to and address subtle shifts in the tenor of a conversation or the group dynamic, to keep a group or meeting on task, to be attentive and organized—all of these aspects of group facilitation are important and require skill. However, what of the facilitator's meaning-making capacity? Certainly, a significant body of literature suggests that a leader's stage of development matters (McCauley et al., 2006; Rooke & Torbert, 2005; Strang & Kuhnert, 2009). Similarly, Berger (2012) emphasizes the importance of a coach's frame of mind in helping adults develop. She writes:

> My sense is that coaching, like leadership, makes a particular developmental demand. This demand is for us to be clear about what the difference is between our opinions, positions, and feelings and that of our clients. We need to have nuanced understandings of the different perspectives that people might have inside the organization. We need to be able to understand the difference between being liked and doing our job well. We need to be able to use a variety of theories and tools and not be used by them—to pick and choose when to use particular tools rather than being disciples of one system of ideas or another. Each of these is a demand for some of the capacities and characteristics of a self-authored meaning system (or beyond). (pp. 92-93)

Extrapolating from considerations of leadership and coaching to facilitation, I argue that a convener and facilitator of a group such as ours requires a certain frame of mind as well. Indeed, the ability to attend to multiple territories of experience (i.e., purposes, strategies, behaviors, and outcomes) and multiple layers (i.e., first-, second-, and third-person practice, inquiry, and impact), to assert one's own opinion while respecting and considering another's different opinion, and to collaborate all require a certain frame of mind. Even to hold ambiguity and uncertainty (like what we experienced in our group) requires a certain frame of mind. According to Berger's statement, the frame of mind required is at least Self-authoring, an assertion with which Kegan (1982, 1994) would agree. As such, I maintain that, significantly, I, the convener and facilitator of the group, measured at the latest stage of the group members, specifically as a late Redefining action logic, just past self-authoring, moving into self-transforming. Additionally, my Redefining action logic, along with my knowledge of CDAI, likely allowed me to enact most of the requirements of convening and facilitating the group. One might argue that even my (and the other members') interest in convening a CDAI group would only be likely given my (and our) self-authoring capacities (and beyond).

Learning #2: Friendship and connection. The structure or rather the enactment of friendship was a crucial feature of holding the group emotionally. Though this might seem like an obvious learning, its significance cannot be underscored enough. I did not realize its significance, however, until we were well into our work together. Had I understood it fully from the outset, I would have built in more intentional structures to facilitate our development and enactment of friendship. By the structure and enactment of friendship, I mean specifically the development and maintenance of connection and

the affiliative bonds, warmth, care, and knowing that create safety, trust, and mutuality

but that also tether people to each other. This is a key point and distinction between

"being friends" and is not specifically referring to the friendships that existed between

certain group members. The structure and enactment of friendship is not merely about

affection or "liking" someone necessarily but rather the willingness to relate, to connect

with, and to know—in happiness and struggle. Friendship implies a different level of

commitment in contrast to professional or casual, detached affiliation. In this way,

friends are willing to "stick around" and trouble the waters together. Friendship is the

arms that hold. This point was emphasized fairly early on in the meetings as members

discussed openly the need and desire for deeper connections among each other; it also

emerged during the post-group conversations. During one of our meetings, in which we

openly discussed how to best support and challenge each other and continue to cultivate

the relational aspects of our group, Mimi said:

> [I would like to just] clarify Danielle's question about will it be possible for us to
>
> meet at all. Because I do agree with her. I also feel like in order for me to be—
>
> not that I can't be fully myself because I'm not too shy when it comes to just
>
> talking about what I think or feel at times, but [related to] the aspect of being able
>
> to be accountability partners for all the members, there's a level of knowledge and
>
> intimacy you need to have with an individual to be able to say, "Oh, yeah, well,
>
> this is how Rose reacts and so I'm going to be able to call her, ask her, [or] inquire
>
> why she might be feeling this way based on the patterns that I've seen…" and
>
> we're not going to be able to do [that]. Our investments with each other can only

go so far, and so if at all possible where we could meet [in person] once during this time, [that] would be great, if time permitted.

This quote not only highlights Mimi's desire and need for more connection, but it also shows the importance of friendship in engaging in developmental work with others. As Mimi stated, there is a deep knowledge and trust required to support and challenge someone.

Another related insight was that the two members who exited the group early—Ruth and Jessie—did not have a prior or external relationship with any other member outside of the group. They were also the only two members who did not hold or express an abiding desire to connect and develop within and through relationship. Significantly, when they became triggered, especially by the relational aspects of the group (they both felt "different," "othered," or isolated through experience or ideas in some way), without an intrinsic and intentional commitment to connecting with others and working through relational challenges in the group, they withdrew. There was nothing else to keep them tethered to the group. The discomfort was simply not worth continuing with the group, particularly given the many competing priorities they held. This reaction was both unconscious and conscious in the sense that they knew they were experiencing a disconnection from the group but did not recognize it as part of their developmental edge, nor was this grappling with disconnection and relationship viewed as part of the work of the group. Additionally, the struggle to connect deeply and vulnerably with others went beyond the group's work, mirroring members' experiences in their lives. Those members who struggled most acutely with connection within the group also struggled outside of the group, whether or not this was an acknowledged or stated concern (as in Jessie's

case). To be fair, neither I nor the other members fully understood this charge of the group to name and discuss the work of relationship as trigger and fodder for growth. Ruth, who exited fairly early in our process, said during our post-group conversation:

> Well, I will say even at times within the group, I still felt like I was toggling between two worlds. Who I was didn't always line up with the group, but with that, I can see where it was all a part of getting me to this point. So it challenged me to make some decisions at a point in my life where that challenge was coming from every aspect of my life. So, I felt a disconnect a little bit with the group. I didn't want to continue just to focus on me, me. I know it sounds odd because I didn't want to get so consumed with what was going on with me [that] I'm losing sight of what God was doing in and through me. It was a matter of trying to find a connection with the group as far as what I believe and it may have been that we were in the early stages of getting to know each other, but I did not—I didn't feel it. It seemed as if everyone else was on the same page. Even in our comments, we would comment back and forth and discuss things. It did not appear that someone else was like-minded. So that was my own perception, my own judgment. So because of the space I was in, I did not feel that I would be received.

Ruth's quote is particularly salient and complex, possessing many layers of meaning. First, it clearly exhibits Ruth's lack of connection with the group, which in part precipitated her leaving. Interestingly, this experience only surfaced in our post-group conversation, almost a year after she exited the group. Upon her exit, Ruth did not mention to me her perceptions of her difference from the rest of the group (unlike Jessie)

or her lack of connection to the group. She also was the least engaged in the work of the group outside of meetings. She exhibited a certain inability or lack of interest in connecting and developing friendship. In her defense, she exited fairly early, while we were still getting comfortable with one another and developing trust. However, given her triggers, which she was not able or willing to engage with at the time, she chose not to work through her discomfort during our initial trust-building period as other members did. In actuality, everyone else was not "on the same page" as she assumed, an insight I shared with her during this conversation. Sharing her experience may have revealed important considerations for the group and furthered her own and our collective developmental process. It may have also aided the development of trust and friendship among her and other members.

Ruth's quote also illustrates her Achiever action logic as well as her simultaneous desire and struggle to move beyond it and her entrapment within it. Specifically, Ruth's primary concern with and disconnection from the group related to what she perceived as our over-privileging of our individual agency and will—a typically Achiever focus and concern—which she was coming to challenge in herself. Her statement—"I didn't want to continue just to focus on me, me. I know it sounds odd because I didn't want to get so consumed with what was going on with me, [that] I'm losing sight of what God was doing in and through me" —speaks to this new awareness. In another part of our post-group conversation, she says:

> [Being in the group] was an opportunity to deal with these issues of
> performance—[the need to] perform and to be "on" —quote, unquote. "On"
> because the root of all of that was self-sufficiency, independence, and pride. But I

knew performance was an issue when I was in the group. I didn't know what the root of it was.

Ruth was coming to a new awareness about her current way of knowing and being, and its limits. However, this remained a developmental edge for her that she was not able to fully see or therefore move beyond. She was not fully able or willing to alter her perspective on her independent, Achiever action logic and begin enacting the interdependence of the next action logics. Given her strong religiosity, the closest she was able to approach relinquishing some of her independence was in her relationship with God, although she admits to a stubbornness around this. What she could not fully see or enact was the group's potential and intention to facilitate her development beyond a focus on independence. Her quote illustrates her later insight that the group was an opportunity (provided by God) for this development. Later in the conversation, she said that after leaving the group, God dealt with her more harshly to spur this development in the form of some very difficult experiences after she rejected His initial, gentler offering for this learning within the group. Ironically, the mindset that she negatively attributed to the group (albeit not incorrectly) and that fueled her feelings of disconnection was also her own rejected mindset and developmental edge, which fueled her inability to connect and inquire with the group. Ruth could not see the group's potential or trust the group to hold or "receive" her, or to support our collective development. To be fair, we had not yet developed collective capacity for this, and we were very much still immersed in our collective blindspots. However, Ruth's conundrum further highlights the importance of friendship and willingness to connect. It is friendship that allows individuals to risk seeing themselves in the other, beyond difference. It is friendship that inspires people to

struggle and listen into the dark together. It is friendship that beckons one to lean in toward the other, to risk knowing and being known, when one would rather turn away.

As detailed in Chapter 4, Jessie's isolation and disconnection from the group was more pronounced and went beyond simply not connecting with other members. Although she spoke directly about being an introvert and being more like a "loner," as well as being "all head, no heart," she was also impatient and frustrated with the group's process. Furthermore, as Jessie's discontent and disconnection grew, she actively and vocally began differentiating herself from the group. One of her journal entries provides a typical illustration of this distancing and differentiation from the group. She wrote:

Seems like we are just hovering at the beginning stage figuring out A and B … when can we start rowing? My problem is that I already have a very clear picture of where I am today and where I want to be. Maybe I am just at a different stage of life than others within the group. Most of the group members are fairly young and trying to figure out their lives and their careers—been there, done that. Take the U-journaling exercise, for example. I started doing this kind of thinking a few years ago as part of my mid-life awakening. I meditate on these questions all the time, and I have a fairly good idea of where I want to go, so I am not sure if repeating this exercise is going to help me. About the 360 assessment, I have done several of these exercises before (including 360 evaluation at work), plus I seek feedback on a regular basis as part of my personal development over the past decade, so I really don't think I will gain anything new this time round. Honestly, I am not sure if I want to do anything different with my life or even care what others think about me anymore. I am very content where I am, how I feel, what I

have, where I am heading, and how I am progressing. I feel like I am just not

seeking the same things the rest of the group are seeking.

This statement represents a shift from her earlier comments and thinking, which

expressed confusion about where she was in her life and excitement about working with

and learning from other women with similar experiences. It also highlights two areas of

differentiation from the group: with the group's work and process, and with other

members and their experiences. As mentioned earlier, Jessie acted primarily from and

approached the group with an Achiever mindset, although she measured as early

Redefining. This likely reveals her instability in her Redefining action logic. She wanted

to see outcomes and "return on investment," which she emphasized during our post-

group conversation.

Another example demonstrates her feelings of disconnection from other members

of the group. During one of our meetings, in which I provided a summary of our U-

journaling responses, I challenged her around her focus on difference rather than

similarity:

Jessie: So this is kind of one of my frustrations in this group. I totally agree that

we all want self-development and improvement, and that's why we're here. But I

don't have that fear that you all mention. I think from my U-journaling, it didn't

come out. Danielle, I think I agree with you that it really depends on the life

experience and what stage you're in in your life, that some of the confidence and

the expectation is going to get adjusted. Hopefully, you guys get there sooner

than I did. But I just feel like I don't have the same worries, some of the worries

that you guys have.

Shakiyla: And that's okay, right? I mean, I don't think we all had to have the same exact experience, right? Like there's some—

Jessie: Well, so that's why it's frustrating to me, [Shakilya], and I'm sorry I had to bring this out, but that's why it's frustrating to me because you mentioned earlier that kind of we all feel fear, but I don't. So I feel like I'm not—I don't know. I just don't feel as engaged because I feel like I'm in a different bucket.

Shakiyla: Okay. Well, I mean, one, I didn't say we all feel fear, but the majority of the group does. I mean, you are definitely an outlier in that particular area. But I think there are other parts where I think you have a lot of similarities in other areas, right? And so I guess my question—

Jessie: I agree.

Shakiyla: Yeah. And so my question to you would be, what is your frustration about? You know, like really unpack that a little bit more in terms of why that is a particular frustration.

[PAUSE AND NO RESPONSE FROM JESSIE]

Shakiyla: And not that you necessarily need to answer—I mean, I'm just saying this is part of what we're up to in our group, right? I'll get more into that later when I talk about the purpose of the group because I actually think your frustration is good and—good, in quotes, in the sense that it can help you also illuminate yourself better and then also help us push the group forward in a different way, too, right? So that's why I think it's important to unpack those things a little bit more in how we're approaching stuff.

This exchange illustrates Jessie's frustration with the group, as well as her growing focus on difference rather than similarity. In my summary of our collective U-journaling entries, I described how our responses clustered around similar themes. Jessie's response demonstrates her focus on the one area of difference between her and the other members. Also, her inability to connect with the other members once she perceived that the group was not aligned with her specific interests and priorities further highlights her enactment of an Achiever action logic. Friendship, mutuality, and connection were not her primary (or even desired) reasons for joining the group, nor did she consider them necessary for the group's work. She was the only member who did not agree that we needed more time to connect and engage. Rather, she felt that we needed to be more efficient and make better use of our allotted time together. Additionally, when her discontent with the group became clear to other members, Danielle, who lived in the same metropolitan area and who was extremely triggered by Jessie, suggested that she, Jessie, and I meet for lunch to connect. Danielle felt that if only she could "just sit and talk to her in person" and get to know her better, that would possibly have helped her to understand Jessie's concerns and to foster friendship. In one meeting, Danielle requested that the group consider meeting in person, explaining:

> So I'm a very relational person, and I tend to invest in time with people because it helps me with connecting with them. So I'm not a person, you know, like say Jessie. [Speaking to Jessie] I know that you mentioned that you have a friend and you guys can be apart for months or years and then you come back together and it's, you know, just the same. And there are maybe two friends [of mine] where it feels just like that, but I doubt that that's even really the case because for me

connecting takes interactions through time, and some of that we clearly do during these meetings. But to me, it's not the same as being with the person in person to be able to build that kind of relationship. And given that we're doing such intimate-level work, it seems really important to then try and establish that kind of connectivity. So—I—and I think, you know, as—even as we're talking today, it becomes clearer that because our work is so focused on working on hidden things, I think some of it is going to really come to light [from] the perspectives of our fellow group members. And so again, to me it stresses the need to connect in some way.

This passage highlights not only the significance of friendship and connection but another piece of the tension that Jessie brought to the group: her more differentiated and less relational personal style. It also shows the significance of Danielle's attempts to meet and connect with Jessie, even as she was triggered by her. However, it was clear that Jessie was not interested in meeting. She cited a busy schedule and did not follow up on Danielle's attempts to find a mutually beneficial time for us to meet. Already frustrated, Danielle retreated after a series of unsuccessful emails among the three of us. Jessie's alienation from the group continued until her exit. This scenario further illustrates the importance of friendship and how its absence (in this case) impacted the group.

The two other members, Lily and Rose, who grappled with disconnection or difficulty with being vulnerable in the group, either had someone else with whom they felt safe and close within the group or they had an express or explicit commitment and desire to connect and be in relationship through the group. This likely kept them in the group even at times when it was difficult for them and they wanted to exit. This

contrasted with the experiences of Ruth and Danielle, again, neither of whom had prior

relationships with any other members nor an express desire to build and develop within

the group. Lily, who suffered from social anxiety and often experienced alienation and

disconnection in the beginning of the group, talked extensively about how her connection

to me kept her tethered to the group. In one of her journal entries from earlier in the

group, she wrote:

> But in this group, I don't know much about group members except that they share
>
> my "stuckness." Today's talk was a part of us trying to establish a group
>
> goal/question. People talked about their hopes and struggles mostly abstractly. It
>
> felt more like an intellectual exercise. There were things that I could relate to but
>
> nothing that really struck a chord in me. This group doesn't feel safe to me yet.
>
> I'm still getting to know the group members and seeing how they respond/connect
>
> to me. It's not meant to be a support or therapeutic group. While we're all
>
> committed to respecting one another and providing some support, we're also
>
> committed to challenging each other. I do believe that challenge can be good … I
>
> don't want to rush into any decisions right now. But honestly, if anyone other than
>
> [Shakiyla] were running this thing, I would bow out. My love and loyalty to my
>
> girl propels me to challenge myself, which might be a good thing.

This journal entry illustrates how prior, deep connections to other members kept

members tethered to the group during triggering times and provided a bridge as we

expanded our connections and built trust collectively. Sometimes, the prior relationships

fueled feelings of loyalty or obligation to stay in the group, particularly during

challenging moments. However, as alluded to in Lily' journal entry, she also had an

explicit desire and goal to develop better connections with people and grow in

relationship, as her lack of connection to others was a primary concern that she brought to

the group. In our post-group conversation, she said:

> But, for me, I feel like engaging in any way is work, which is why I decided to
>
> stay. I think what makes it feel more meaningful is when other people are
>
> engaged. If other people aren't really engaged, if I can't connect, then it loses its
>
> potency.

This statement highlights Lily's commitment to developing friendship and working

through her challenges around connecting.

Mimi, who experienced less discomfort interpersonally in the group, described

how previous relationships helped her connect within the group. She said:

> I think the first couple of months were challenging …When I'm getting to know
>
> people, I like to be around them, and I think the first couple of months were hard.
>
> I mean, I was fortunate enough to know three people in the group beforehand, but
>
> then that made it much easier for me to feel comfortable. And I'm always a person
>
> to talk about myself anyway, so I don't think I'm shy at all. But I think I
>
> recognized that I probably was more comfortable perhaps than other people might
>
> have been to just trust the process and trust the group in that process. Because I
>
> knew you, Rose, Danielle, and a little bit of Lily, but I didn't know Lily in an
>
> intimate way. But because you know Lily, I feel like I know Lily. But anyway—
>
> [LAUGHTER]—but at least I felt okay. It seemed much easier, and I think it's
>
> because of my nature. It was a very no brainer. [I said to myself] "Okay, these are
>
> women. I can trust them. I can put myself out and be safe." And I wanted that to

> instantaneously happen amongst everybody and it didn't. And so that's why at
>
> times—and I always remember when I would hear particularly Rose and Lily
>
> speak—I was oftentimes just taken aback because I didn't realize how challenged
>
> they were at times.

Not only does this passage illustrate the importance of having prior connections to other

members in the group, but it also provides additional acknowledgement of Rose and

Lily's struggles with connection from the perspective of another group member.

While the importance of the enactment of friendship was often highlighted by its

absence or the challenges around it, when it did show up collectively and between

individual members in the group, it absolutely made a difference. It generated an

environment of safety, trust, and care that held us through challenges both within and

outside the group. It strengthened our ability to hold each other, to see and be seen, to let

go, and to stick around—to create an adequate holding environment for growth. In a

tender and vulnerable moment during one meeting in which Danielle tearfully expressed

feeling overwhelmed by her present life circumstances and feeling triggered by some of

the discussion in the group that day, other members stepped up to hold her. Mimi

responded:

> And Danielle, I just wanted to thank you for sharing and also reiterate what
>
> Shakiyla said, that we are here for you … You are in a [difficult] context right
>
> now in your life and your [path] is extremely, extremely demanding and
>
> overtaking. And so we don't want to disregard that and this process for you … we
>
> should remind ourselves [and] remind each other that we're going to have our
>
> ebbs and flows, and at this stage in your experience as we speak on September

27th, "This is where Danielle is," and then we do what we need to do to support

you through it. So I'm committed to doing that and you're not alone. And the

struggle is a struggle that we all want to embark on together to help you and to

help each other get through that darkness. And I love you, Danielle.

Mimi later added encouragement in response to Danielle feeling overwhelmed by the

challenge of development given her difficult life circumstances:

Just the fact, Danielle, that you identified in this conversation where you had a

disconnect and where you felt like your current experience right now where you

are with trying to figure out what's going on with your health and finding a place

to live, etc., for me the fact that you've identified, "These are my day-to-day

[challenges] that I'm experiencing and I'm struggling with this other level of

thinking," to me shows that you also are embarking on pushing into that [growth

space] … or where you are in a Redefining moment … If this is all about us

seeing things, the way you describe what you've experienced today was a way of

seeing and acknowledging. You didn't say what you were going to do about it,

but you just said, "Hey, this is not right with me right now and so I'm letting you

all know that this is going to be a struggle." And I would say that this may not

have happened perhaps months ago. You might have pondered it more, but [you

would have] tried to figure out how you should incorporate [the developmental

information and challenge to improve]. But you're just saying, "No, I don't know

how to right now. I can see that there's this vision, but I'm not in the space." So

for me, I feel like you're actually in it, believe it or not. But you're acting on this

Redefining stage and seeing that you are in it right now.

These two passages illustrate several important dynamics that occurred in the group through the development and maintenance of friendship. First, for context, Danielle and Mimi have a longstanding relationship outside of the group, although Mimi was not the only member to offer support during this exchange. The earlier passage illustrates how spaces of vulnerability and intimacy surfaced within the group through friendship and connection (especially positive prior relationships), and allowed for increased emotional holding and support. Further, this holding, along with the developmental focus of the group, opened up opportunities for members to see each other and be seen in new ways. In the second passage, Mimi reflects on Danielle's consciousness and names a shift or development in Danielle's thinking and action that Danielle was not able to recognize herself. This speaks both to the power and possibilities of a CDAI group and of the enactment of friendship. Indeed, friendship represented the arms that held us in our fear and challenge, that kept us from falling into the ambiguity and uncertainty of our work together, and that stopped us from fully turning away.

No less important, friendship held us by providing the safety, trust, and knowledge to see and be seen—a crucial aspect of the work of developing in community. However, there is a tension in being seen, as it is both supportive and challenging. It involves intimacy and vulnerability. For all of us in the group, especially those who struggled significantly with relationships and connection, being seen felt risky, and yet that was the crux of the work. Lily's comments in a post-meeting reflection describe both the benefit and challenge of being seen. She wrote:

I can tell that I feel more comfortable in the group. My anxiety was minimal.

Reflecting on other members' progression within the group was a nice exercise. I

don't know if anything new was revealed (at least for me), but it's nice to get concrete feedback, and it felt like a way to connect and get out of my own head—which is usually a good thing. I don't normally think of myself in connection to others. It's both nice and nerve-racking. Guess it puts me in a more vulnerable position—to face being seen. This exercise didn't create any uncomfortable feelings for me because we all primarily stuck to positive comments. Hearing others talk about shadow areas can be more challenging—although I look forward to doing more of that with the group. I have particular struggles with challenging others, which is something I've been working on in my other group and marriage. I view the cases, four parts of speech/ladder of inference, and shadow work as some ways to do that. I'm looking forward to doing the work with you all.

This passage highlights Lily's ambivalence about being fully seen (and perhaps challenging others based on her seeing them), which was shared by other members. However, as she discusses here, the development of friendship and deeper connection made it safer to risk vulnerability and challenge.

Learning #3: Time. Time is key. The amount of time a group spends together, both in terms of the number and frequency of actual meetings and the duration of the group, is crucial. We learned this the hard way—when we were not feeling connected to each other, when we were disengaged with the group's work between meetings, and when we realized that after almost a year of meeting together we were in fact just getting started. There was simply too much that needed to be done and established in a group of this kind for us to meet for two-and-a-half hours a month for 10 months (the initial contracted period), which amounted to roughly 25 hours. A mere 25 hours to establish a

rapport and connection, educate members about the concepts and theories, determine a shared focus collaboratively, and evolve our consciousness. It took me that long just to figure out the technology. Further, Torbert (1987) reports a minimum two-year timeframe to realize a stage change—not that I completely expected this result from the group. In retrospect, this seems like an obvious, almost ridiculous, oversight, but it provides a good illustration of the trappings of the Self-authoring mindset to which most of us were subject. However, the concern about time (and level of engagement) emerged rather early in the group's process. Approximately four meetings into our process, Danielle posted the following comment in our online discussion group:

> "How much of a commitment is needed in order to make change and get "unstuck"?" This struck me during the last call we had yesterday because for at least the first half of the call, I felt rather disconnected. I suspect that in part this is because I don't engage in the work of the group or the material much in between our Saturday conference calls. At this point I feel far away from the initial concepts we first discussed after the readings and am having trouble tying those into the questions we discussed yesterday (Kegan & co. seems like such a blur) … This disconnection also spurred the last comment I had during the call yesterday, which was to see if others were able and willing to meet more frequently. Honestly the amount of time we connect at present seems too little to expect a substantial change … So what do I propose? So far, I'm still thinking we do need more time together as a group. Perhaps meeting every 2-3 weeks instead of every 4, even if the actual meetings are shorter. What do others think about this? I

know the thought of having more meetings during days and weeks that are

already quite full is difficult.

This concern was expressed by other members and continued to surface, ultimately

resulting in the increase in our meeting frequency from once to twice a month. During

one meeting, Mimi stated:

I feel like, for me, the one way that will help me get to this level of figuring out

how we can hold each other accountable and how we can grow in this process

together is more opportunity to talk. I feel like going a month before each call is a

long time, and a lot happens, and, personally, I get very distracted and the rest of

life continues. And so one of my challenges is that I'm not a good journaler and

so it seems to me the consistency of talking [is important] and going into the

conversation and journaling like right after that…. But I think for me … it would

be just the frequency in which we talk and then also I think to create a space so

that people feel like they are connected.

This quote further highlights the issues of time and frequency of communication with

which the group wrestled. It also demonstrates the specific challenges of fostering deep

connections and doing this type of work virtually. The increase in the meeting frequency

did not make up for the fact that the group was scheduled to convene for only 10 months.

We found that it took us that long to get comfortable with one another and figure out

more specifically what we were up to. We simply ran out of time, which is what

prompted our decision to continue the group in another iteration.

The need for more time in the group can be understood theoretically. As

mentioned earlier, the three key features of an effective holding environment for

development are that it holds on, it lets go, and it sticks around (Kegan, 1982). While these features cannot be quantified, in considering the issue of time, they suggest that a good holding environment is enduring, which potentially requires a longer time horizon. Additionally, considering the holding environment as a culture of embeddedness, a longer time horizon would also be necessary to develop the relational space that this implies.

In summary, the supports and challenges that created the holding environment for consciousness to reveal itself and evolve in the group were both practical and emotional. However, they were distinctly less about any interventions that we undertook; rather, they included the facilitation of the group and the development of friendship. It is almost as if the interventions were the backdrop that gave us something concrete to do or respond to as we built the holding environment that would allow us to peer into ourselves and each other—as we explored the ephemeral, slippery realm of consciousness.

Evolution of Consciousness

At this juncture, the reader may be wondering exactly what the punch line is. What happened as a result of the supports and challenges provided by the group? Did we evolve? Did we develop superhuman capacity and functioning that allowed us to go out into the world and leap tall buildings in a single bound? Well, the answer to the third question is no, but the responses to the first two questions require much more nuanced and complex considerations. Specifically, there are multiple options for or paths of development. Berger (2012) extends Kegan's (1982) work and focuses on practical ways to support adult development in the workplace and through coaching. In considering how to help adults develop, she makes explicit the various choices for intentional development

and the difference between vertical and horizontal development, particularly at later stages. Specifically, she asserts:

> The developmental space for someone who sees the world through a self-authored form of mind is potentially twofold. She can work to consolidate her self-authored form of mind, to stretch it into more domains, and to have it be more consistently available to her (because it may be the case that in some of the domains in her life she has more difficulty sustaining her self-authored mind). Or she can work to expand this form of mind into more of a self-transforming space. (Berger, 2012, p. 87)

Here, Berger highlights the difference between vertical—or across stage—development and horizontal—or within stage—development, which is not often directly or substantively discussed. Implicit in this discussion is a key point that relates to my learning about how members of the group did or did not evolve. Specifically, a person's stage of consciousness is uneven and slightly aspirational. It is uneven in the sense that it comprises multiple lines of development that include the cognitive, moral, affective, interpersonal, and spiritual (Kegan, 1982, 1994; Wilber, 2006). Further, individuals are not evenly developed across all lines and as a result are often not able to enact their most complex stage of consciousness across the varied domains of their life-worlds. Additionally, most of the measures for development—and certainly the GLP, which our group used—privilege certain lines over others (usually the cognitive) and measure (and score) people at their most complex knowing. Often, a person's measured stage is aspirational, meaning that he or she can make meaning at that stage but may not necessarily live most of his or her life acting from that stage. Again, a person does not

lose the capacity to enact earlier stages in the process of development; rather, he or she simply incorporates the other stages into his or her meaning-making "toolkit." These distinctions complicate considerations of development in the way that Berger describes above, widening the options for development within one's current stage or into a later stage. Related to our group, some members spoke about how they experienced themselves as primarily acting from earlier action logics in different areas of their lives (e.g., professionally, personally, etc.) or in relation to different people in their lives. The developmental framework and language gave them a way to make sense of these nuances and have greater self-awareness. Other considerations in addressing this question were the issue of limited time (discussed earlier) and the related fact that the study design did not include a post-test to measure any stage changes we may have had.

Nuances and considerations aside but duly noted, there were important learnings about the evolution of consciousness. Before coming to those, I argue that, collectively and specifically for the members who did not exit the group early, we developed more scope of awareness (i.e., about ourselves and others), and several of us likely experienced horizontal movements, or rather more of a "filling out." These shifts may have been subtle to the unobservant eye and sometimes even to members themselves; however, in looking at the arc of the group's development and how each member brought herself to the group over time, there were movements that can be explained developmentally. This section requires more illustration of the first-person story in order to fully describe the key learnings. However, because I have chosen to privilege the collective story overall, I will not provide a treatment of each member's development here. Rather, I offer a detailed illustration from one member as an example.

Learning #4: Becoming fatter versus taller. This learning necessarily warrants a confession: I tend to privilege vertical development over horizontal. That is, my preference is usually for continued stage growth. Yet, as mentioned above, I found that most of the group members experienced more of a fattening or filling out into our current centers of gravity, or rather more consolidation within our current or most stable action logic. This makes sense given that the group did not run long enough to realize a full stage change and that the bulk of our time was spent building the capacity or supports to engage in the work. Because of my over-privileging of vertical growth, I was not at all prepared for the possibility of horizontal growth. What did this horizontal growth look like? For several members, considering our strong Self-authored and Achiever tendencies or action logics (including those who were crossing over into a post-conventional action logic) it involved a consolidation of our ability to have a voice and advocate more consistently in the group. As mentioned earlier, this involved a certain amount of trust, vulnerability, and risk. Lily, who exhibited a great deal of self-awareness in her reflections, serves as a good example of this. She measured at late Achiever but had significant and frequent fallbacks to earlier action logics. The group was extremely triggering for her as she struggled with her social anxiety. Earlier in the group process, she was often silent for long stretches of time and would need to step away from the group as a result of panic attacks. However, as the group developed, she became more comfortable and was able to express herself more. Even the meeting transcripts reveal this. Her voice was noticeably absent in earlier transcripts, but later transcripts included more text from her, sometimes pages at a time. I offer the following four excerpts demonstrating how Lily became fuller over time:

Lily's written self-assessment: March 9, 2014.

I'd place myself primarily in the Expert and Achiever action-logics.

Professionally, I feel more comfortable acting within the expert action-logic. I'm

a perfectionist who lacks a lot of confidence in my own personal knowledge and

experience. So relying on data, other "true" experts, and very (possibly overly)

detailed reports is the way that I can prove my worthiness to others. My trusty

fallback action logic is the Diplomat. I can deal with conflict, but it makes me

very anxious. Sometimes I can push myself. But other times, I just go with the

flow in order to keep the peace and to hopefully maintain my esteem in the minds

of others. Unfortunately, my current action logic is not sufficient to meet the

needs of my job. I feel like I need to fall more fully in the Achiever and Redefiner

[*sic*] roles since I have to collaborate a great deal while managing the differing

opinions of others. Thinking about Keagan's model of development, I would say

that I haven't fully entered the Self-authoring mind. I think having greater

confidence in my own personal authority would help me enact some of the more

complex action logics.

In my personal life (with those that I'm close to), I feel more like an

Achiever knocking on the door of a Redefiner [*sic*]. As a wife, I feel more

confident in owning my own perspective and collaborate creatively for the good

of the whole. I have pretty good self-awareness about my patterns of behaviors

and even see some of my limitations.

I think the big difference between how I behave personally and

professionally is related to my cognitive and emotional development. I definitely

feel more developed cognitively. This creates a disconnect between what I'm able to conceive and what I'm able to actualize. Oftentimes, the anxiety I feel in situations is so acute that I withdraw. Like Jessie said, I feel like I enact behaviors from earlier action logics depending on the situation. When I'm more vulnerable, I can even look like an Opportunist. But, for the most part, I don't stay there too long and can think through different responses once my initial trigger is more removed.

But the Transforming and Alchemical action logics don't feel much like me since they deal with larger level systems. When I read those descriptions I feel like a small-town girl with wide eyes in the big bad city. It's hard for me to think about working with a larger group. Even this group is a small stretch for me.

This passage describes poignantly the nuances and considerations around development mentioned earlier. Specifically, Lily fairly accurately and honestly assesses her own action logic well before getting her results. In fact, almost everyone in the group accurately self-assessed their action logic. She discusses her center of gravity action logic, as well as her unevenness in different areas of her life and across different circumstances. She also describes the importance of consolidating and becoming more stable in her center of gravity action logic. Another interesting and important statement from this passage is that the group felt like a stretch for her. In fact, this was the case for all of us. A collaborative, mostly relational, ambiguously-structured, inquiry group was a stretch for our mostly Achiever center of gravity.

Lily's journal entry: March 16, 2014.

I'm a pretty private person and sometimes I find it difficult to share around people
and think of them judging what I say and how I say it. That's a challenge for me in
this group too … During the last group session, I was sick. I blamed my lack of
participation on my illness, but it was also nervousness over being perceived as
stupid. I was definitely anxious. The more I heard what I deemed smart responses
stated articulately, the more I felt that I would make a fool of myself.

Again, this journal entry provides a poignant self-reflection of her own challenges with
connecting and self-authorship.

Lily during a later group meeting: September 9, 2015.

I think—what else was coming up for me? So yeah, I was also thinking about the
interventions we talked about. I don't know what y'all are thinking, but maybe
we're trying to do too much. One, it's still not that much time when you think
about it … And then I also agree with you too, Mimi, about not necessarily
thinking that where I am is a bad place and I struggle with that and I was thinking
about that, too, after I got the [GLP] results back. I do want more freedom, for
sure, and I definitely feel like there are ways that being at a different action logic
might be helpful sometimes and I can use some of that. Even though I'm an
Achiever, and I had a lot of qualities of Redefiner [*sic*] too, there are ways even
within the Achiever realm that I don't feel like I'm fully developed … [There are]
things that I can work on in that area. So … yeah, and I hope you can still hear
me, but I'm about to wrap it up. I just think [this new phase is] really helpful and
I think we're getting a lot more honest. It makes me feel more comfortable and I
think that that's the way to really get at the deeper emotions and the underlying

assumptions and to really start to challenge each other, too. So, I don't know. I'm

rambling a little bit, but I'm going to stop.

This excerpt illustrates clearly Lily's emerging voice and her development in how she is

able to name and challenge the group's collective Achiever action logic and

developmental edge and shadow. It also demonstrates the development of the group and

how both the friendship and knowledge of the theory and approach combined for

increased awareness, insight, and movement. Similarly, Lily's self-described "rambling"

suggests a growing comfort with working out her series of not fully formed thoughts

aloud and with the group. This is meaningful given her social anxiety and usual concern

about appearing "stupid" around people. In contrast to her first excerpt, this one shows

both the growth in her ability to express her voice and opinions and the shift in the

group's dynamic, which she mentions directly.

Lily's post-group conversation: February 24, 2015. In response to my question

about whether she felt like she had experienced any movement, Lily said:

Lily: Yeah, it depends on the day. Today is not a good day, but even if I'm being

objective or not caught up in my mood, then I would say I've had small

movement.

Shakiyla: And what does that look like, I guess?

Lily: Even the way that I've been in the group in terms of being in

relationship authentically, trying to build relationship. And my other group, same

thing. I really see it more around my relationship building than anything else.

Feeling more confident in my work, in my voice, recognizing that I have

opinions, feeling more comfortable voicing them. Feeling like I have some

authority. And to be able to set up some boundaries.

This conversation shows Lily's awareness and description of her development of voice

and horizontal movement, which are consistent with what the data illustrate over time.

Though Lily was just at the threshold of moving into a post-conventional action logic,

even saying (in her self-assessment passage) that vertical development to the next action

logic would help her in her work, she indicated that more horizontal evolution likely was

more appropriate for where she was at the time. Indeed, Lily's micro-movement of

becoming "fatter" and more stable in her existing action logic was in all likelihood

precisely what she needed to better meet the demands of her life, illustrating how fatter is

sometimes better than taller.

While Lily provides a good example of this horizontal development, she was not

the only member that experienced this. Mimi, for example, experienced more

consolidation of her Achiever action logic in her development of greater voice,

confidence, and ability to determine and achieve important personal goals both within

and outside the group context. Additionally, she actually measured as early Redefining

and throughout the group process grew in her ability to enact the capacity of this action

logic. Specifically, she described improving her ability to tolerate ambiguity and

uncertainty, to inquire about and engage other perspectives and ways of knowing, and to

refrain from immediately taking action.

Learning #5: Development in relationship for the self-authored knower. This

learning derived from my experiences and observations within the group, engagement

with the adult-development literature, and personal insights throughout this process. It is

also connected to the learning about the need to commit to developing relationship in order to engage this type of group process. The move from Self-authorship to Self-transforming, or specifically in our cases from Achiever to Redefining and beyond, involves moving from greater differentiation and independence toward integration and interdependence. In fact, this is a constant dance or tension throughout development, this negotiation between the self and the other—or differentiation and integration (Kegan, 1982). However, one could argue that the move from Self-authoring to Self-transforming involves the greatest leap of integration of them all since the self-authored knower is considered to have reached the pinnacle of self-actualization and often rewarded for her or his self-authorship with success and/or self-assuredness. Further, United States culture overall can best be described as one of self-authorship, providing support and reinforcement for the Self-authored mindset. Moving into the Self-transforming mindset often feels like making a leap into the great unknown, into uncertainty and insecurity, into more being and less doing, and into less self-importance and self-focus. It involves privileging both the individual and the collective, and the interplay between the two. Further, and specifically within an American context, there often is little support for this movement.

Given this move into interdependence, it seems apropos that the best practice for this would be in relationship; indeed, it seems that anything else would only serve to reify and reinforce the Self-authored mindset. Certainly, there is a need for first-person work in order to facilitate this move; however, first-person action and inquiry alone do not seem sufficient. Lily described the shift from independence to interdependence that occurred in the group and its relevance:

While I initially started the group to focus solely on my own personal growth and believed that any interventions we might try would be particular to me, I do see the importance of focusing more on the group process itself and how my development and triggers play out in this particular arena with all of you. It's like a mini ecosystem. But I've been focusing on "my issues" in isolation for so long it's been unsettling to think about working differently. And yet, I believe it's what needed for me as I move from the Achiever to Redefiner [*sic*] stage. This is a slower and more subtle approach when I compare it to my previous intervention antics, but that's because those were more centered around behavior change.

Here, Lily describes simultaneously the group's movement to a more interdependent, system-level awareness and functioning as well as her own. As illustrated in the group's data and story, this movement created a tension and developmental edge for the group as we individually and collectively struggled to connect with each other in a generative, mutual way and develop and enact a shared vision and path that resonated deeply within each of us. However, it was ultimately the experience of trying to develop in relationship, within a community of practice and inquiry, that generated both the light and the shadow within our developmental journeys.

In summary, I cannot say objectively whether or not individual members evolved their consciousness since the group did not run long enough for a stage change to occur, and, as a result, we did not do a re-test of the GLP. Additionally, we spent the majority of our time together building our holding environment (specifically, developing friendship). However, based on the second- and first-person data and my observations, most of us did experience micro-shifts or more horizontal "filling out" or consolidation.

Admittedly, this outcome was likely not as important as the key learnings that resulted

from our work—namely that horizontal development is just as, if not sometimes more,

important as vertical development and that growing in community is particularly crucial,

if not necessary, for at least the conventional to post-conventional shift.

Research Question 2

How does the context of a CDAI group serve as an effective holding environment

for the evolution of consciousness?

An extension of research question one, this question dug deeper into a specific

feature of the holding environment: the method of CDAI and how it held the group in our

attempt to see and evolve our consciousness. Here, I place a magnifying glass on CDAI

and interrogate how and which aspects of it (if this can be ascertained) fostered the

conditions for development. To review briefly, CDAI is both an approach to and method

of helping individuals and groups simultaneously inquire and take action more effectively

and in the moment. Rather than offer a specific set of prescribed practices—although it

suggests a couple (e.g., four parts of speech and the action inquiry case) which are

modifications and extensions of action science—CDAI proposes a framework for

thinking about and engaging in first-, second-, and third-person action and inquiry

(Argyris, 1995; Foster, 2012; Rudolph, Taylor, & Foldy, 2001; Torbert & Associates,

2004). There are five primary features of or considerations in CDAI that provided

grounding for my conceptualization of the group and informed how we enacted our

process. I briefly summarize those again before turning to which features likely

contributed the most to holding the group. Specifically, CDAI: (a) promotes a

developmental approach and provides a language around how adults develop more

emotional and mental complexity in their action logics over time; (b) considers and describes four territories of experience—that is, one's purposes and intentions, strategies and plans, behaviors and actions, and the outcomes of these—that an individual (and group) can be aware of and take perspective on in any given moment; (c) delineates three sites of practice and research: first-person (the subjective), second-person (the intersubjective), and third-person (the objective); (d) offers the use of four parts of speech—framing, advocating, illustrating, and inquiring—as a second-person practice toward the development and maintenance of integrity and mutuality in an interaction; and (e) explicitly considers uses of power, privileging and working toward increasing levels of mutuality and collaborative inquiry. All of these features combine to offer a complexly broad and deep approach to individual and group growth and development. They build on each other and work synergistically in such a way that it is difficult, if not impossible, to tease out which feature accounts for specific effects. Indeed, this was not a randomized, controlled trial or even a quasi-experimental exploration. Moreover, with the exception of the four parts of speech and developmental focus, we did not apply these features as discrete interventions. However, all of the concepts informed my facilitation and the structure of the group.

Given the previous description, I maintain that the overall structure and approach of the method created the conditions for consciousness to emerge within the group. Admittedly that is bold, definitive statement, and I do not write it haphazardly. Given my individual (relevant since I was the convener and facilitator of the group) and our collective tendency toward action, movement, and concretizing, CDAI provided a helpful starting point and model with which to engage the ambiguity of consciousness.

Specifically, its focus on collaboration or mutually transforming power, stages of consciousness or action logics, four territories of experience, and first-, second-, and third-person action and inquiry provided the "guidance without prescription" that we needed to not get lost either in a flurry of activity or in an ocean of ambiguity. In this way, the method provided some useful structures and frameworks while allowing for maximum freedom, which was initially scary to my perfectionist, self-authored tendencies. In fact, we all initially struggled with the freedom of the approach. However, because we did not have a step-by-step guide or specific mandate from which to enact the method—beyond the essential instruction to pay attention and share power— we were forced into a slower, more expansive and ambiguous approach. One of my researcher memos from the time when the group shifted in its functioning reveals my awe and insight around the method after a particularly powerful group meeting:

> [I]t was just really beautiful to see how people are now intrigued and committed to the work that we are doing in the group, and it's weird, as I step back and reflect on that ... It's so powerful. And just to see how time unfolds things, but also the beauty of the methodology that we're using because I do believe that the methodology got us to this point. And also … my use of the methodology and really being attentive. Really just attending and watching and using that to make certain moves to get us where we are…. And now we've just moved into this much deeper level of functioning, and I almost don't even know how we got here…. It's amazing, and just looking at it from my own meta-learning about this process, [it's] just having structures that work and that support, and then trusting the group to do its work and be steadfast, but especially the power of naming and

noticing and inquiring, which is essentially all that I think happened … [it] was

just holding space, naming, inquiring, and yeah, naming and inquiring.

Goodness, yeah, and holding space. And then letting what happens happen.

This memo excerpt demonstrates my in-the-moment sense of how the overall approach, and the essential processes contained therein, functioned to hold and support our work. That said, at the risk of seeming reductionist, I offer that three specific aspects of CDAI seemed particularly helpful in creating the holding environment of the group and served as developmental supports and challenges: developmentally focused action and inquiry, collaboration and mutuality, and the four parts of speech. To my point in the memo, these features comprised the elements that structured and supported our ability to hold space, pay attention, name, and inquire. These considerations were not only highly influential in the way I chose to facilitate the group, but they were also identified by other members as salient features of our work that impacted them individually and the group collectively. Further, they can be considered and separated into two distinct categories or ways of engaging CDAI, thereby providing a helpful framing: (a) the ways of thinking and (b) the practices and structures offered by the method.

Learning #6: Ways of Thinking that Hold

As described earlier, the power of CDAI as a useful method for facilitating the evolution of consciousness comes less from a set of prescribed practices and interventions and more from the breadth and depth of its framework. More specifically, it offers ways of thinking that provide support for evolution. This was where, in our action and inquiry, the sum was more important than its parts as all of the key concepts built on each other and worked synergistically to create a framework and approach.

Certainly, I considered all of the concepts in creating the meta-structure for the group and in my facilitation. However, it is worth calling particular attention to the method's developmental focus and its focus on mutuality as two crucial features or ways of thinking that held us tangibly and moved us forward.

Developmentally focused action and inquiry. A crucial holding for the group was the developmentally focused action and inquiry in which we engaged. The focus on development both supported and challenged us in multiple ways. Specifically, it offered a new language and way of understanding our consciousness, and it provided a method for facilitating the subject-object shift (Kegan, 1982) by surfacing developmental edges and hidden assumptions.

As mentioned earlier, I intentionally and thoughtfully shared information with the other members about the theory and method we were using both through providing various readings and informational videos between meetings, and by giving mini-didactics and explanatory overviews during the meetings. Members cited their new knowledge of development and their stages of consciousness as the most important benefit they gained from the group. Lily said:

> Even some of the language around development I think has been helpful to think
>
> about where I am and how some of where I am developmentally might be holding
>
> me back in terms of where I want to go. So that language I think has been
>
> helpful. Yeah, I was trying to think about different meetings [and] what we
>
> discussed, and what might have been helpful. Certainly, I think the
>
> developmental framework was helpful. [PAUSE]. Probably most of all

Similarly, when asked about the primary benefit of the group for her, Mimi said:

I've gained a greater appreciation of what the developmental arcs are, the process in which we're all developing as adults. And so it's been the new vocabulary. [I'm] still learning to speak the language, but this new vocabulary really I think first and foremost just opened up another world, just another lens to look at my interaction, [and] look at the interaction of others. So it's given me a greater sense and a deeper sense of how we interact as people … and that wouldn't have happened if I wasn't part of this group … So I think for me, it's really just given me another sense of being, which I appreciate. And [I've been] trying to incorporate [this way of thinking into] my day-to-day [interactions], both personally but more on the professional side.

As described in the excerpts, the developmental focus and language offered us a new way of thinking about ourselves both within the group but also more generally in other areas of our lives. Our collective ability to reflect on and discuss our stages of consciousness and to have discussions related to development increased over the course of the group. We would explicitly mention our or someone else's action logic or fallback action logic during conversations about how our group was functioning. Furthermore, as Mimi mentions in the above quote, some members began using a developmental lens in other areas of their lives. Mimi said that she began managing her team differently at work. Danielle, Rose, and I used a developmental lens to reconsider conflicts that we were having with partners. Lily began noticing and reflecting on her fallback behaviors. This ability increased after we learned our action logics and could make the theory practical and personal.

Another way that our developmentally focused action and inquiry held the group

is that, in addition to giving us a language to describe how we were currently

experiencing ourselves and our current ways of knowing, it allowed us to recognize and

name our individual and collective developmental edges and intervene appropriately.

The following exchange occurred toward the end of our initial group work and provides a

good illustration of our collective capacity to view ourselves and each other

developmentally, to recognize our triggers and developmental edges, and challenge each

other. While we were not fully able to do this all of the time, and some of us were more

skilled than others, we definitely improved our ability to engage development directly.

Specifically, during a conversation in which we were considering whether or not we

should continue the group beyond the initially agreed-upon 10-month period, Mimi

advocated in the following way:

> Mimi: I'm going to challenge us as a group because I think because many of us
>
> have the achiever as a fallback or perhaps as a fallback where you have to get
>
> things done. We have to do [things] and when we add more things to our plate,
>
> we're a little uncomfortable because we want to be able to have it in order. I'm
>
> feeling like this group is pushing that button for us because it's forcing us to
>
> explore things that we may not feel like we want to explore right now because we
>
> don't think we're "ready," quote, unquote. And so I'm going to challenge us as a
>
> group … let's try to work through that because I really believe that we're at a
>
> place that if we were to stop, we may not be able to find ourselves in a better
>
> place on our own. Let's not retreat. I'm not taking away the fact that we are all
>
> very busy. I am not taking away that fact and I'm not taking away the fact that it

is a commitment. And there are many competing priorities. But I will say that

this type of work, from what I'm seeing, is a commitment worthy of cultivating

and finding that space and honoring that space. Because I think we are amazing

and have—just in the last couple of months have opened up to a new way and like

you were saying earlier, too, Lily, about how this group is helping you to practice

how to be in the world. I want to encourage that practice for all of us because …

I'm finding it helpful.

   Lily: Mimi, thank you for that because that definitely is my fallback, to

retreat and avoid. And certainly, especially in the beginning of the group, I really

wanted to drop it. [LAUGHTER]. Like nobody's business. I was not enjoying

myself and I wanted to go. Which actually is not the case now. I feel a little bit

more excited and I feel how the group can be helpful, thinking about that. But I

think it is still good for me to interrogate [my desire to push] because I know that

is something that I do. I actually would want to continue, but I know that—and

maybe this is part of my Achiever style—I do have some other commitments,

other things that are really important for me.

This communication demonstrates the ease with which members began to incorporate the

developmental lens into their considerations and discussion in a nuanced way. Here,

Mimi is able to notice a potential group developmental edge and name it, as well as

advocate around it. As a result, Lily catches herself in the moment of enacting a habit.

However, while she considers and agrees with Mimi's observation, she also continues to

assert her own perspective, which then allows other members to raise similar concerns.

This was a phenomenal discussion that would not have been possible at the beginning of

the group for multiple reasons. First, members were not as knowledgeable about the

theory and method, and would not have been able to see themselves fully through this

lens and engage each other in an honest and personal discussion about development.

Similarly, the group was not yet comfortable with seeing and challenging each other in

this way. Finally, the comments reveal the value and utility of the method from

members' perspectives, which developed over time as we engaged the process.

Mutuality. From the beginning, I focused on creating a holding environment and

sharing power with the other members. As such, this feature was a crucial aspect of my

facilitation and structuring of the group, and served as a primary consideration in my

enactment of the method of collaborative inquiry and CDAI. Indeed, initially,

collaboration and mutuality were more conceptual and showed up in my facilitation.

Specifically, I took a deferential approach so that members were aware that I was just

convening the group and not "in charge"; it was our group, not my group, even though

many of the members definitely felt like it was my group in the beginning. In my

enactment of the facilitation, mutuality was mostly expressed as: explicit statements of

my intentions for mutuality and descriptions (and readings about) the collaborative

method; sharing information with the group so that I was not the only one with

knowledge and so they could begin to engage critically around the concepts; checking in

and getting feedback about our process and their desires and needs; and engaging them in

a group consideration and development of purpose. These were practices that I used

throughout the group; however, they were more pronounced in the beginning as we

established our relationships and working norms. In fact, the first few months of the

group were taken up with trying to establish mutuality by sharing information and co-

establishing our shared interest, purpose, and action. The following is an example of my use of a collaborative facilitation approach in developing our shared purpose:

> I wanted us to really think about how we move from this being Shakiyla's research project or process to "What are we co-inquiring about as a group and how do we get there, right?" And so again, my research is sort of the meta-container for it, and I've initiated this and I will be taking on certain types of responsibility, such as moving us forward and providing structure around certain things. But I want us to shift gears into this being for ourselves and each other as part of this precious time that we all have in our lives right now to engage this work… So in moving toward that, what I would like to propose now is that we move into a very deep listening process and discussion whereby we each talk about what our hearts' desires are around what we should be doing together and to develop a mutual question that's separate from my conceptual framework and my research questions. Let's forget about all of that right now, even though that is the context that brought us together. Let's forget about that and talk about what we all together want to do or what is our group question that we want to have.

In this passage, I am explicit in my intentions for mutuality and a co-inquiry approach. This was not the first or only time that I made explicit mention of my intention for mutuality and collaboration. Following this, the group co-sensed and co-developed group questions to guide our inquiry together, which we refined over a couple of months.

As demonstrated in the above passage, sharing power and facilitating a collaborative, mutual process required specific consideration and effort on my part. Because I was the person who initially convened the group and had the most knowledge

about the method, I had to balance leading the group on the one hand—especially in the

beginning—with inviting mutuality and joint decision-making on the other. It also

required that I gradually shift my leadership of the group over time as other members

became more informed and skilled. While I continued to hold a primary leadership and

convening role throughout the duration of the group, we began moving more in the

direction of shared facilitation and I received feedback that other members noticed a shift

in my facilitation. Later in our group process, mutuality surfaced more in the

consideration of and interactions among the entire group. Mimi even co-facilitated a

meeting with me. One member, Lily, in reflecting on the group's development of

mutuality and the shift in my facilitation, said:

> I mean … initially, and then probably to a great degree now, you definitely led the
>
> group. And there was a lot of—especially in the beginning—just a lot of new
>
> language, new literature. And so there was a way where it was almost like—not a
>
> lecture, so to speak, but there was a didactic quality to it … [later] I think you
>
> started to hold your opinions in more as we progressed and leave space. It's
>
> definitely been driven by you. Without you, we would have had no group. So
>
> that is—that is the key still, I think … But you definitely—I could see you step
>
> back more and you were more honest about maybe some of your insecurities with
>
> leading the group. I think other people—I could feel other people's voices more.

Lily not only describes the shift in my facilitation to allow more space for other members,

but she references the earlier knowledge-sharing work of the group. Her quote also

illustrates the balancing act required to convene a CDAI group. On the one hand, I was

the convener and facilitator, holding the responsibility and power that those roles

entailed, and yet, I was attempting to enact a different type of facilitation that involved

mutual power. Over time there was more space for other members to express themselves,

voice opinions, and influence the group process. The earlier exchange in the previous

learning between Mimi and Lily (about not falling back into an Achiever mode)

illustrates how mutuality developed within the group and also how it created individual

and group capacity to support and challenge each other. During a later meeting, Lily

challenged the group and made the following statement related to increasing our

mutuality:

> It'll also be good to give [Shakiyla] a break as our facilitator. I've had thoughts
>
> for a while that perhaps we need to share the facilitation role so that it's not so
>
> imbalanced and provides a different way of relating and experiencing the group.
>
> I'm sure I haven't said anything sooner since taking that role in any form is very
>
> scary to me. I would really rather not. Still, I think it's a discussion worth having.

This statement illustrates several shifts in the group and ways that the value and intention

toward mutuality supported and challenged the group. First, at the first-person level, it

demonstrates Lily's movement during the course of the group's convening. It also

demonstrates the importance of mutuality in fostering the development of the group and

individual members through a more equitable balance of power and a sharing of the

facilitation that would allow us to hold and be held differently. Finally, because some of

us struggled with fully inhabiting our self-authorship, co-leading the group would serve

as an important developmental challenge. While we never fully moved into shared

facilitation of the group until the second post-group phase (because of the method and its

focus on mutuality) we were able to move toward increasing mutuality.

Learning #7: Practices and Structures that Hold

While CDAI primarily offers a framework and approach to guide inquiry and practice rather than prescribed interventions, there are two specific practices suggested in the method: the four parts of speech[11] and action inquiry cases (using the Learning Pathways Grid [12]), both of which are extensions of action science tools and practices (Rudolph, Taylor, & Foldy, 2001; Torbert & Associates, 2004). Our work and structure were informed primarily by the developmental focus, ways of placing our attention (via the four territories of experience), and considerations of mutuality and first-, second-, and third-person inquiry. Beyond that, I did not want our inquiry and practice to be constrained by any particular intervention initially. Despite my initial fear of this openness, I wanted the group to be free to choose whatever interventions and practices we felt would be useful to our exploration and development, provided it fit within the general structure of the method. That said, early on, I introduced the concept of the four parts of speech as a possible structure to better facilitate our second-person practice. It was perhaps the closest thing to a useful action inquiry "intervention" that we employed as it provided a more concrete framework and structure. It also offered us a safe and effective way to name and inquire around our own and others' perceptions and experience. Beyond that, we used it as a first-person reflexive practice to illuminate our own consciousness and shadows in our interactions with others. The four parts of speech

---

[11] The four parts of speech are a second-person practice intended to increase integrity and mutuality in communication and interpersonal relations. They include framing, advocating, illustrating, and inquiring, which serve to test "the congruence between our own and others' frames, actions and impacts" (Foster, 2012, p. 6).

[12] Action inquiry cases are essentially action science's two-column cases where the case holder presents the dialogue and their thinking during a problematic interaction for group analysis and discussion of her or his underlying assumptions and frames. The Learning Pathways Grid is a guiding structure that helps participants move through the case analysis.

resonated deeply with most members. Danielle describes the useful first-person insight she gained from just considering the four parts of speech and her usual way of speaking and thinking:

> It makes me think of my own relationship and how this came up in couples therapy, that one of the things that I tend to do is I'm so busy preparing my next framing, advocacy, and illustrating work, I completely block out anything else that he is saying to the point where he will be trying to build mutuality, [and] I am not engaging because I have to work on my own individual thing as a defense. But it's true. So I can see how [this habit of over-advocating occurs] across several arenas in my own life. Very insightful. I like this. You know, when I came into this [meeting, I didn't know about this] four parts of speech thing … [but] I am astounded at how much I have gained, how much insight this has brought. I'm shocked. Really.

This was a significant experience and shift for Danielle, who was initially less excited about and disinterested in the four parts of speech. In her typically honest and vulnerable manner, she went on to describe the challenge of using the four parts of speech because she mostly uses advocacy at work in her position of power and knowledge (as a physician) and is not truly interested in mutuality. Conversely, Lily talked extensively about her fear of advocating and her over-reliance on inquiry as part of her diplomatic fallback and struggle with self-authorship. Both of these illustrations highlight the power of the four parts of speech as a developmental first- and second-person practice, even beyond actually using it more instrumentally to structure effective communication.

In addition to considerations of the four parts of speech and our own ways of speaking, some of us were able to practice using them outside of the group. This was particularly true for those of us who were in leadership positions at work. First, I regularly practiced the four parts of speech in email and verbal communication at work as part of my own personal commitment to action inquiry outside of the group. For me, it was an extremely useful structure especially during performance conversations with direct reports. Additionally, I became more aware of my use of the different parts of speech in meetings. I noticed that generally I was able to both advocate and inquire; however, I tended to overuse advocacy when frustrated or when I perceived that my perspective was not being heard. While I was not always able to act on this awareness in the moment, the noticing was new and opened up possibilities for different action. Mimi, who was a leader at work, also found the four parts of speech especially helpful in her role:

> In some ways I feel like inadvertently I've been practicing certain aspects of the four parts of speech at work. And I've seen the success of it and it's been told to me by this one particular individual how it changes the entire dynamic about what teamwork is about in the office setting…. And then again, I keep going back to this, but I just so believe this, the vulnerability aspect of the four parts of speech is so critical because when you show yourself to be vulnerable—and I have not done that for the longest and I'm beginning to do it more and more—it's amazing … how that will help.

Not only does Mimi exhibit an extremely nuanced understanding of the underlying transformative purpose and practice of the four parts of speech beyond effective

communication (a more instrumental goal), she describes being able to practice more

vulnerability in a setting where that may be risky. She explicitly attributed some of her

changes and experimental actions at work to the influence of the group. This further

demonstrates how her practice within the holding environment of the group allowed her

to confidently practice in her life outside of the group. Additionally, she describes a

positive, third-person outcome as a result of her new practice.

      While we never practiced using the action inquiry cases, the group thought that

they would be a useful structure and decided to engage in case work during the next

phase of the group process. Based on other action inquiry groups, the cases hold great

promise as a development tool (Rudolph, Taylor, & Foldy, 2001). Indeed, Lily suggested

that the case work would help the group get more specific and personal, and less

intellectual. This made me question whether or not we would have been better served by

engaging in more prescriptive and structured work from the beginning. It is certainly

possible that using these action inquiry structures and practices upfront may have offered

a structure that would have grounded our inquiry and provided a more effective bridge

between our current conventional and emerging post-conventional action logics,

particularly for members like Jessie. However, many of these practices require a baseline

level of trust, vulnerability, and risk to enact safely and effectively, which we had not

fully developed in the beginning. Furthermore, it was important to me that we all have a

shared language, purpose, and knowledge-base for greater mutuality. I also believe that

the more subtle ways of thinking about the approach enabled us to build more capacity

and greater awareness, and to take a more nuanced approach to our second-person

interactions and dynamics than a purely instrumental, intervention-focused approach would have.

In summary, CDAI is a useful approach that held us well in our inquiry and practice. Specifically, it was open enough to challenge our Achiever center of gravity while also providing the structure of a framework that offered new ways of thinking and some useful practices to support us. While the approach is complex and cannot be reduced to discrete pieces, the specific structures that seemed to change the quality of the holding environment were the developmental focus, the value and practice of mutuality, and the four parts of speech. Together these structures and concepts allowed us to develop our capacity for greater first- and second-person awareness, naming, and inquiring.

Research Question 3

How does the group function as a system and how has it developed collective capacity to evolve consciousness?

As described in earlier chapters, over time the group began to congeal and function more collectively than it had in the beginning. This observation was reiterated by several members and provided the impetus for our decision to continue past the initial group period. In many ways, it felt like we spent our entire 12 months effectively "clearing our throats" and creating the necessary conditions and holding environment in preparation for our main performance. That said, the development of "collective capacity" was almost as crucial as the presence of collective capacity. Indeed, the process of developing collective capacity spurred the awareness and evolution of a system-level consciousness, along with our own individual development. This point

raises certain questions: What are the conditions for groups (or systems) to develop? Does group development precede individual development, vice versa, or do they develop in tandem? I do not know the answers to these questions, and I do not know if it is possible to know them with any certainty. However, in our experience it was likely a bit more of an alchemical[13] process. Certainly, the group's awareness of itself and development as a system provided a necessary container or holding environment for our individual development. Yet, our individual commitment and willingness, our effort and surrendering, our stagnation and shifting combined over time to create and impact our system. This may seem obvious, but it warrants stating nonetheless, lest one lose sight of the complexity and alchemy of these types of interaction effects in the effort to reduce and make meaning of them. That said, the group can be viewed as a system, which was a helpful framing for us, and the group's function as a system can be described in three ways: in the development of mutually transforming power, through the presence and enactment of archetypal mirroring and reflections, and the management of polarity and ambivalence.

Learning #8: Mutually Transforming Power

One of the primary goals of CDAI is the development and enactment of mutually transforming power in our social relations (personal and professional) for the ultimate purposes of effective and timely action. Specifically, Torbert (2004) discusses eight different kinds of power that correspond to the different action logics from coercive power (Opportunist) to mutually transforming power (Alchemical). He built off of Argyris and Schon's (1974) concept of Model I and Model II systems to describe the

---

[13]I am using this word in the standard sense, according to the English definition and meaning, not in a CDAI, developmental (action logic) sense.

different aims of a less effective, unilateral power style that attempts to assert and achieve

one's own personally defined goals (Model I) versus a more effective, mutually

transforming power style that values collaboration and mutual influence (Model II). In

CDAI, Model I and Model II are renamed Mystery/Mastery and Collaborative Inquiry

respectively and are influenced by developmental theory (Foster, 2012). The aims of

unilateral power or Mystery/Mastery are to: maximize winning and minimize losing

(Opportunist); minimize eliciting negative emotions (Diplomat); maximize rationality in

presentation (Expert); and achieve self- or team-defined goals (Achiever). The aims of

mutually transforming power or Collaborative Inquiry are to: optimize internal

commitment of partners to shared vision (Redefining); optimize inquiry and valid

information about actual performance versus espoused values (Transforming); maximize

mutual influence and positive freedom of choice (Alchemical); and enact timely action

(Ironic) (Foster, 2012; Torbert & Associates, 2004).

Over the course of the group process, we began moving toward an enactment of

mutually transforming power (and Collaborative Inquiry) rather than unilateral power (or

Mystery/Mastery), especially on my part as the convener and primary facilitator.

Members became more connected to their own internal commitments and reasons for

participating in the group (Redefining); more aware of and willing to name individual

shadows and system dynamics (Transforming); willing to practice advocacy and inquiry

toward mutual influence (Alchemical); and better able to take action on behalf of the

system in the moment (Ironic). Because our capacity developed and expanded in these

ways, we were able to influence each other in a way that was challenging but not

coercive. While we may not have reached Torbert's (2013) full conceptualization of

mutually transforming power, toward the end of the group we finally all held it as an intention and were committed to practicing and pursuing Collaborative Inquiry. Lily's statement during our last meeting about the group continuing not only described the group's movement toward mutually transforming power, but also demonstrated that power:

> I think obviously given what's been going on, that there have been some withdrawals in the group and now is the time to kind of recommit and re-conceptualize exactly how we want to see things move forward, because I think it started off [with] maybe more of the power of the leadership being with [Shakiyla], given that [she] had the knowledge [related to the group's] formulation to more of a gradual process where we have more [of] a voice and it's more collaborative. So this is the time to really talk and think about what we want to see moving forward.

As the above quote illustrates, most of my goals and intentions for the group, as they related to power and mutuality, were met. The group learned and mostly understood and internalized the method, especially around development; we developed shared goals that resonated individually with all of the members; and we began valuing the importance and moving toward more enactment of shared facilitation. We had less movement around shared responsibility for the practical functioning of the group and maintenance of its structures, though we initially agreed that I would serve the group in this role during our convening, while full decision-making authority would be shared mutually. Additionally, given the time constraints of the group, we were not able to fully transfer the facilitation of the group to another member; however, this was our eventual intent.

Learning #9: Members as Mirrors

In taking a more expansive view of the group as a system rather than as just a collection of individuals, individual group members created and functioned on behalf of our system by exhibiting hyper-expressions of specific aspects of our individual and collective experience and by serving as mirrors—or archetypal reflections—for the group (see Table 6).

Table 6

Group Member Archetypes

Member	Action Logic[1]	Presenting Concern	Group Archetype	Developmental Edge	Shift
Mimi	Early Redefining	Dissatisfaction and disillusionment professionally and around religious faith	The Cheerleader	Self-reflection and awareness of intent/strategy/action; systems view and awareness; managing inquiry/action polarity	Greater awareness and confidence in path and capacity for aligning intent/strategy/actions
Rose	Achiever	Disconnection from social and professional networks and community; overwhelm around professional goals and capacity	The Isolated	Interdependence and managing inquiry/action polarity; self-reflection	Developing more vulnerability and openness
Jessie	Early Redefining	Uncertainty and in transition around family life and future ; unfulfilled professionally and uncertain around desired career path; struggle to align intent/action in certain areas	The Critic	Interdependence and managing inquiry/action; acceptance of ambiguity; second-person awareness of shadow	No shift – exited group
Lily	Late Achiever	Anxieties around being in relationship and connecting with others; self-authorship professionally	The Allergic One	Self-authorship and independence	More comfort with vulnerability, connecting and self-expression in group
Danielle	Redefining	Professional dissatisfaction and uncertainty around vocation; challenge around self-authorship within family	The Feeler	Self-authorship and acceptance of ambiguity	More acceptance of ambiguity; cultivation of voice and wisdom in group
Ruth	Achiever	Lack of alignment between intent/strategies/actions; social isolation	The Avoider	Alignment between intent/strategy/actions; interdependence	No Shift – exited group
Self	Late Redefining	Lack of alignment between intent/strategies/actions; professional and relationship dissatisfaction	The Perfectionist	Alignment between intent/strategy/ action; managing being/doing polarity; interdependence	More comfort with ambiguity, imperfection, and polarity

These archetypal reflections, which were often developmental edges and/or triggers, both supported and challenged the group. Our ability to function as a system rested in our ability to make space for, recognize, name, and possibly address (which sometimes meant sitting with) these archetypal reflections and their expression. Indeed, to see everyone, along with their particular archetype, as a necessary part of the system was a key aspect of the development and function of the system. In this way, each member's first-person experience became not just her experience but served as a mirror for other members, as well as a feedback loop for our system about its functioning, capacity, and health. Oftentimes, our various archetypal expressions gave voice to unnamed, rejected, and necessary aspects of our individual and collective experience. Sometimes these mirrors were overly triggering and resulted in shutting down; at other times, they were helpful and catalytic. For these reasons, they always held the possibility for development and generation provided we could recognize, name, and inquire around them. For example, as The Critic archetype, Jessie expressed our individual and collective concerns about and need for movement and progress. This was both a necessary feedback loop that helped us stay focused on action and consider what we were doing and a potential shadow to name and inquire about given our strong Achiever center of gravity and preference for tangible outcomes. While not every individual in the group held this awareness and capacity—the ability to explicitly recognize, name and inquire around our archetypal reflections—a few of us did and used it in service of the group, which expanded our collective consciousness and opened up opportunities for new insight and action. In this way, this mirroring was a system-level functioning and capacity. On a tangential but still related note, the presence of these archetypes provides

further justification for the importance of a sufficiently diverse system. After all, it was our difference—and the mirrors and tensions it created—that provided the possibility for us to see ourselves, assuming that the reflection was not too triggering or completely rejected. However, this was a part of the group's work—recognition and integration. Lily stated this point beautifully in describing how Jessie and Danielle, in very different ways, helped her to see herself and take action differently:

> So, sometimes anger or just annoyance can bring out true feelings…. I mean, one, I think it was good to be able to use some of that [developmental] language to see what was going on with Jessie … So to be able to see [a developmental edge] in someone else, I think it almost even helped me see it in myself. And I talked to you about how I could see how I was pulling away in my other group and making excuses for maybe why I didn't want to move forward because it was challenging. So there was that piece. Then I think with Danielle putting it out there, I just feel it was more honesty and I pushed myself to be honest.

In this passage, Lily expresses how Jessie and Danielle served as mirrors and inspiration for her—Jessie's discomfort with the ambiguity of the group process and her acting out around it, and Danielle's honesty and ability to express difficult emotions, respectively. Not only did they help her see herself more fully within the group, but she was able to gain new awareness of her patterns and behavior in other contexts. She was also able to take new action around being honest as a result. Another illustration of how the mirror and archetypal reflection operated in the group came from me and the trigger that Jessie's Critic archetype (described in more detail later) provoked. The following is excerpted

from a researcher memo that I wrote almost immediately after receiving a disturbing

email from Jessie critiquing the group's process and slow movement:

> And so I got a couple of email responses from one of the group members last
>
> night and … they sort of made me angry actually, even though I agree with her….
>
> I think some of [Jessie's critique] is probably related to her developmental
>
> capacity, as all of our ways of approaching this are. And so that was kind of
>
> frustrating for me, too. But then again, why am I frustrated by that? Because
>
> again, there is a way where I can see some of what's happening with that, and
>
> especially I suspect that she might be at a stage four, you know, have an achieving
>
> type mind, which is what I really suspect. And so, yeah, this [process] would be
>
> very frustrating for her, [the fact] that we're not working on transformation.
>
> Which I share that same frustration—[LAUGHTER] —because I also have that
>
> type of stage of development, too, even though I'm moving into a stage five. But
>
> still, that is very strong in me, the wanting to achieve and accomplish things and
>
> have things go the way that I planned for them to go and … [SIGH]. Or maybe
>
> I've externalized my frustration, [and] because I am frustrated with how the group
>
> is going and what I perceive as people's lack of commitment to the group.

This memo, which goes on for much longer describing my interpretation of Jessie's

critique, is a good example of my own first-person inquiry and reflection around my own

consciousness and shadow. It also illustrates my in-the-moment trigger and unfolding

recognition of how Jessie was mirroring my own unexpressed concerns about the group

and its progress. This acknowledgement was useful as it allowed me to see myself in

action and experience a potential developmental edge that would affect my facilitation of

the group. It also allowed me to expand my awareness of what was happening in the group, as well as between me and another member, and intervene appropriately.

In the next section, I present a description of each member's archetypal reflection along with one or two illustrative examples that demonstrate the archetype's presence. Table 6 (which appears earlier in the chapter) provides a summary of the archetypes along with other details about our individual developmental journeys.

Descriptions and Illustrations

The cheerleader (Mimi). As this archetype, Mimi consistently held the group and its members in positive regard. She maintained enthusiasm for the group's work and took up the role of advocating for the group when other members were experiencing more ambivalence (or felt less connected to the possibility of the work and their own reasons for joining). In this way, she often served as a reminder to other members of our purpose. She also worried about group members' wellbeing and experience in the group, wanting everyone to feel included and have a positive experience. As a result, she took up more of a challenging and leadership role. She also openly acknowledged others' growth and looked out for them when they seemed to be challenged. Because of her enthusiasm, Mimi also worked to learn and apply the developmental lens in her life, mostly professionally. As The Cheerleader, she highlighted the joys and possibilities of our work, and she often advocated on behalf of the group in ways that allowed me to step back from this directly. In fact, she was the first to suggest that the group continue after the initially contracted time period and even challenged the group's ambivalence around this. Finally, in this role, she was the first to co-facilitate.

Illustration #1. From a group meeting in which Mimi applauds Lily for opening up more and expressing her happiness over Lily becoming more comfortable:

For whatever reason, it really is important to me that everyone feels comfortable in the group. I know this is an area where I need to learn to not feel responsible for all the emotions in the group and embrace what may seem uncomfortable to me. They both challenge me. Emotionally I want to be able to "fix" their discomfort and/or frustrations.

Illustration #2. From a group meeting in which we discuss whether or not to continue the group past the initial period and Mimi advocates on behalf of the system:

Oh, I'm finding [the group] helpful and I'm hoping other folks too find it helpful because it's exactly what I feel like my life has been looking for and because I haven't had the environment to cultivate it, it's made it very, very scary and I don't want to lose that. So I'm going to say let's—I'm advocating that we push, that we push, that we push [to continue the group]. And that we have a little toddler who's crawling—and I think this is a great analogy, too, because I have a friend right now—sorry—one of my girls in Tanzania has a daughter who is a year in two weeks and she's at the stage where she has the capacity to walk but she's afraid to walk. And she will hold onto things and there are times when she'll let go of a table and realize that she's standing and for two seconds she's standing, then all of a sudden she's like, "Oh, my gosh, I'm standing" and puts her hands down. And I feel like that's what we're doing almost right now, that we're beginning to start walking a little bit and then we're like, "Wait a second, oh, let

me [put] my hand down because I'm not really sure if I'm actually ready"—myself

included. So I want to say, "Yeah, we are ready and let's do it, like Nike."

Illustration #3. Lily applauds Mimi for her role in supporting the group:

One thing I did notice is really what [Shakiyla] pointed out in terms of how you

really took the group on and I think you challenged us more, especially as the

group developed, and took more leadership and ownership of the group, which I

think is a part of why we're still here today.

All of these illustrations show Mimi's excitement about the group and her belief in our

work. They also demonstrate how Mimi took on some responsibility and ownership for

the group's progress, fueled in part by her passion. Mimi's ability to and fearlessness

around taking up her power served as a reminder and model for other members of our

intention. Implicitly, her role and action also illustrates the collaborative dynamic of the

group that created the space for shared ownership.

The isolated (Rose). Rose exhibited a hyper-expression of group members'

uneven engagement with and feelings of isolation from the group. Rose often

experienced isolation from the group due to her physical location, lack of prior

connections to other group members (except Mimi), and her strong tendency to isolate

herself from others for fear of looking incompetent. While she expressed and exhibited

strong enthusiasm for and interest in the group's work—including always attending

meetings despite a hectic travel schedule, sending additional articles for members to read,

enrolling in an Immunity to Change online course, and opting to continue with the group

past the contracted period—her isolation led to difficulty in fully sharing her feelings and

vulnerabilities in the group during meetings as well as disengagement from the group

outside of meetings. Her silences during various points in the conversation (during meetings and online) were palpable. Usually, when she did speak during meetings, it tended to be from a more intellectual and less personal space. While she began to open up more as the group progressed, she never fully revealed herself and expressed feelings of isolation at different points. In this way, Rose mirrored the group's concern over being seen and connecting. Most members, especially in the beginning, struggled with difficulty relating and being vulnerable. Certainly, Lily, Jessie, and Ruth all experienced acute feelings of isolation and "otherness" from the group.

Illustration #1. From a group meeting during which we discussed our first formal intervention results, from our U-journaling exercise and personal 360 assessments:

Shakiyla: So with both of these activities, how might this feedback or the information and clarity or thoughts that you got from both [the U-journaling and personal 360 assessment], how might they help you moving forward and support the work of this group? Rose?

Rose: I don't know that I have an answer directly for that … in part because I'm still waiting for some of my [personal 360 assessment] responses to come in. I—I was late in sending out the email in part because it was actually—it ended up being hard for me to—to send the email out. [CRYING]. I just have a hard time reaching out to people and asking for this sort of thing. It was really difficult for me and I waited until the last minute to send … [CRYING].

Shakiyla: Yeah, thank you for sharing that. So what I'm hearing you say is that even your experience of completing the activity revealed certain things to you about yourself?

Rose: Yeah, that's right.

Shakiyla: I guess even though it's not the feedback from the respondents, how do you…? I mean, you've sort of gotten your own direct feedback based off of your experience. How might you use that, I guess, moving forward or how has that changed your awareness of different things?

Rose: Well, the irony is that always those people are there for me a hundred percent. And so it's just a matter of opening the door for them to come in. But I know that I get too caught up in my own anxiety about asking for help. And I'm aware of that.

Illustration #2. From our last group meeting, during which each of us shared how we saw other members develop and Rose reflects on Lily's development:

Lily, I feel like a bit of an outsider in this group because there was certainly a core of people that knew each other very well and I was one of the invitees and I'm here not bringing a history with [others or] you, for example.

Both of these illustrations reveal Rose's struggle with isolation within the group and outside of it, of which she had some awareness. In fact, this particular challenge was part of what brought Rose to the group, wanting to develop a more supportive community. This is also a good illustration of how our developmental edges and challenges outside of the group impacted our engagement with the group and each other.

The critic (Jessie). Jessie was The Critic and group hyper-Achiever. She personified the group center of gravity around action and outcome orientation, concrete thinking, and discomfort with ambiguity and process. She was impatient with what she considered over-reflection and described herself as "all head, no heart." While she knew

these things about herself, she did not recognize them as a developmental edge or as problematic, especially not in the moment. As such, she provided an illustration and mirror of the developmental edge that allowed the group to better see and understand this concept and its shadow. Further, Jessie was extremely critical of the group focus and process at different points, questioning the efficiency and utility of our work. She eventually exited the group after her dissatisfaction with and disconnection from the group's work intensified. However, she raised important concerns that we needed to attend to in order to move forward. She was also a particular trigger for both Danielle and me, and personified my own fears about the group process, my facilitation, and outcomes.

    Illustration #1. From one of our early group meetings during which we discussed our individual concerns that brought us to the group and the potential collective focus for the group:

    Jessie: So is this the time for reflection?

        Shakiyla: Yes, I wanted to pause for a minute so everybody could digest everything that was said. [LAUGHTER]. And now, yes, now I think I would like us to move into the discussion phase, and the questions that I would propose that we speak to so that we're again engaging our whole persons are, What struck your heart, what struck your mind, what gave you goose bumps? You know, what really connected, resonated, aggravated? What came up for you in listening to all of our stories and also hearing your own story spoken? Jessie, did you have a comment that you wanted to make about that or were you just asking what we were moving into?

Jessie: Actually, I'm a very impatient person. So I can't wait. I can't wait. I want to start the discussion.

Shakiyla: Okay.

Jessie: So hearing from all of you, I really feel like we are going through the same struggle, trying to get more out of life.

Illustration #2. From my post-group conversation with Lily:

We're a group of women who have a lot of Achiever qualities no matter where we fall [in our action logic] and I think we can get caught up in them. And so sometimes, at least I know for me, I want to see the utility and progress in what I'm doing. And in a process where we're in a group, just like in therapy, sometimes I'm sick of it. But it's hard to feel any movement and I certainly felt that with Jessie. She wanted to see results and she's busy and has a whole bunch of other shit to do. And so if something's going to give, it's going to be things that doesn't feel as useful.

The first illustration provides an example of the energy that Jessie brought to the group; she was engaged and eager to participate but also impatient and wanting to move into action. Though she exuded a hyper-expression of this, she was not alone in her inclinations. Lily's comment about the group and Jessie highlighted this point.

The allergic one (Lily). Because of her social anxiety, Lily exhibited a strong allergic reaction to the group in the beginning, having panic attacks that caused her to literally withdraw from the group during meetings. The group was a strong trigger for her, bringing up insecurities about her contributions and intelligence. Lily's anxiety was a hyper-expression of our collective concerns about being vulnerable and seen, and

relating in the group. She also helped us develop the capacity to accept and hold space

for each person's individual experience and challenges. Her individual challenge

reminded us that our work was difficult and that at different moments it could be

overwhelming for some of us, even if unrecognized or unexpressed. She reminded us to

be gentle. As The Allergic One archetype, her shift toward comfort in the group

corresponded with and signaled the group shift toward greater mutuality, vulnerability,

and friendship.

Illustration #1. From Lily's journal describing her difficulty in the group:

Had an awful day on Saturday. It all started with this group. I was anxious already

because of the legal case that's due on Monday. But the group itself was also very

stressful. I felt like I was about to have a panic attack. I could hardly breathe, my

body was vibrating, my extremities were numb, and I felt lightheaded. It was all I

could do to focus on the group and contribute. At times, I had to leave the room to

keep myself together. Participating in a group— being vulnerable—is difficult.

I'm always thinking about how I'm perceived. I never feel good enough. It

doesn't help that this group is comprised of some very successful women. They're

articulate and clear in their ideas. Meanwhile, I feel like a hot mess. Afterwards,

it took 2-3 hours to calm myself down somewhat. But I was hyped for the rest of

the day.

Illustration #2: Danielle reflecting on Lily's development during our last group

meeting, when each of us described how we saw other members develop:

[I]t was really humbling and remarkable to see how you hung in through several

sessions that were really uncomfortable for you and though we don't share the

exact same set of problems that limit us, the main thing that is often limiting for

me does stem from anxiety. And so to sit in a situation that's intensely difficult is

very incredible. And so it was really remarkable to see how you handled that

every week and kind of still showed up even though you knew it was really

challenging for you, and that that was part of what brought you to the place that

you are now. But see, I know this sounds very cliché, but it was really—it's like a

flower. You were like a flower, Lily. So you kind of started like a little bit closed

and then you kind of worked through, and then you kind of opened up more

gradually over time and became more comfortable, and in doing that, I think that

helped you advance in your own stages of development. But as [Shakilya] often

will say, it's a beautiful thing to really witness in somebody else as they're doing

that.

Both of these illustrations demonstrate Lily's challenges in the group, from her

perspective and from another member's perspective. Danielle's reflection captures Lily's

movement during the group process. Further, Danielle directly describes how Lily's

experience, while more intense, resonated with her, further illustrating that Lily was not

alone in her discomfort and concern about vulnerability.

The feeler (Danielle). Danielle served as the emotional truthsayer and risk-taker,

openly discussing her upsets, fears, confusions, and concerns in the moment (or as she

experienced them) in ways that mirrored what others may have been experiencing, either

mildly or in ways that they would or could not voice. In contrast to Jessie's more cerebral

critique of the group's process and utility, Danielle often offered descriptions of how she

was feeling in response to the group's work and posed questions around what those

feelings meant and how we should move forward based on them. Her vulnerability and communication in the moment inspired others to own and name their own feelings.

Illustration #1. Danielle offering her opinion and experience during a group meeting in which we discussed our next interventions:

Okay, so I like the action inquiry cases and the Immunity to Change, so those would be the two I would vote for as my top choices. But I just want to go on as saying that there are very few things in the [times] that we have been together—in fact, I can't think of any, really, other than right now—that have caused me to feel very anxious at the thought of doing [them]. But this here action inquiry thing, even though I'm voting for it because I think it will be very helpful, it is making me very anxious. And I'm bringing it up because, you know, I think I know why in part it might make me anxious. But maybe other people have insights. But you know, I think about it and I think of it being like a morbidity/mortality case, because I'm going back to [a] reference of what I know and [what] my experience has been. And so it's like being on a hot seat and being picked apart and [reflecting] on your experience from what you had mentioned when you did this before, [Shakiyla], and I'm getting hot as I'm thinking about doing it, you know. So it makes me really—hmm—I feel already sort of defensive and imagine that it's going to be, I guess—I don't know why I think it's a terrifying process, but I'm just throwing that out there. But you know, I still want to do it.

Illustration #2. Lily reflecting on Danielle during our last group meeting when each of us went around and reflected on how we saw other members develop:

I also really appreciated how you've been really open and honest about where you

are and that you've been able to challenge the group. That's something that I

know I struggle with. So it does make it easier for me to start to think about

doing it, and to possibly even do it when I see you and other people kind of [speak

up], own your particular perspective, and then at the same time still be really open

to feedback and perspective from other people and be really emotionally honest

and vulnerable. So I've just seen that increase throughout our group.

The first illustration exemplifies Danielle's willingness to be vulnerable and honest in the

moment. It also demonstrates her capacity for first-person awareness and reflection. In

fact, as described in Lily's feedback, Danielle was great at modeling action inquiry and,

specifically, the underlying gestalt of the four parts of speech. She was skilled at

expressing and describing her experience and perspective (advocating and illustrating), as

well as being open to feedback (inquiring). Her unconscious modeling not only offered

additional enactments of the method in the group, but it also inspired others to be honest

and vulnerable, contributing to our system's capacity.

The avoider (Ruth). Ruth exhibited the group's ambivalence toward and

avoidance of our developmental work. Spiritually "called" to and initially excited about

the work of the group, Ruth actively avoided and prioritized other engagements over the

group. Ruth would attend meetings, though she often shared little. Sometimes she

suggested interventions (one of our first interventions was suggested by Ruth) but then

would not engage outside of the meeting or participate in the agreed-upon activities. I

often had to prompt her multiple times in order to get a response from her on key group

deliverables. Other members also struggled with ambivalence toward the work and

maintaining their commitment to the group in the face of competing demands and commitments. However, Ruth's avoidance was so acute that she exited the group fairly early on, just as we began our direct intervention work. Her early level of disengagement and withdrawal from the group was such that her exit barely resonated with the other members.

Illustration #1. Ruth adding her insight during a group meeting in which we discussed our blindspots and how to recognize them:

I think sometimes when we talk about blind spots, we naturally assume … that blind spots are things that we can't see, but sometimes blind spots are things that we don't want to see. I think when we talk about authenticity, you know, [it's] really getting to the core of what is not being seen, whether it's what we don't want to see or what we can't see. What is not being seen? ... That helps—for me, that's authentic. I know there are things in my life—I know that sounds crazy— that I'm not dealing with. I know that I choose not to deal with them, and how can I seek out from other people and from my environment things that I'm not seeing that I'm not actually aware of? But on the other hand, there are things that I'm just not dealing with right now.

Illustration #2. Ruth speaking to me during our post-group conversation:

If I had stayed in the group—and it's interesting because it could have been that that spirit of fear that was just lying underneath the surface didn't want me to do the work. And because the group felt—at that point, parts of it was uncomfortable, but it was comfortable enough where it was not pushing me to do the work and it was comfortable enough where I could leave the [process].

[Whereas] different things I faced throughout the [summer] and the fall were not comfortable—[LAUGHTER]—and forced me to deal with some stuff and to do the work. Do the work. I had to do the work. I was uncomfortable enough where I had to do the work.

In both illustrations, Ruth describes a conscious avoidance of her developmental work, which she had articulated as a struggle before joining the group. In the second passage, she describes retrospectively how this avoidance caused her to exit the group; however, she was not fully aware of, or rather open about, this at the time. Similar to most of us, one of her primary reasons for joining the group—avoidance of her "work" —surfaced as a developmental edge in the group that she was not able to see around or overcome.

The perfectionist (Shakiyla). I held and expressed the group's collective concerns about competence, getting things "right," and knowing. As the convener and facilitator, I took on the emotional and practical "burden" and anxieties of the group's functioning and process. I acutely felt and worried about how the group was progressing, how members were feeling and experiencing the group, and the micro and macro focus and content of the group (at the individual meeting level and overall). While other members held these concerns, I was consumed by them as the primary person responsible for shepherding the group. In the beginning of the group, I spent hours preparing for meetings, thinking through content and structure. I had a steep learning curve as I had never facilitated a group like this before, nor was I comfortable with the method or technology and other structures we developed. While this certainly manifested as a hypervigilance, it also felt fear-based and triggered my perfectionism, especially in the beginning. My incompetence was potentially available for display and comment in a way

that other members likely feared regarding themselves in a group of unfamiliar, high-achieving women but that they could avoid as participants only. However, my holding of the group, while simultaneously resting in a space of uncertainty and developing mirrored for the group our collective potential to experiment with the polarity of solidity and fluidity, or action in the midst of uncertainty.

Illustration #1. Me reflecting on my challenges and angst about my performance and the group in a researcher memo:

> I am also beginning to realize that my study is a facilitative intervention for me. The challenges and triggers it conjures are connecting me to my own developmental edges and requiring me to move beyond them. I have realized that my current stage-four level of knowing, which likes being the know-it-all, achievement oriented according to my personal values and intentions is being challenged by this work which is not necessarily outcome-focused or linear. It is also challenged by my confusion around running the group and doing this work. Indeed, my research challenges me! It is so much going on and to attend to … the level of complexity astounds me. And the collaborative nature compounds this because I am trying to have more mutuality in the group while "leading" it. How do I meet all of our aims without taking charge and making unilateral decisions? I even fear that my research process is not rigorous enough; that I am not attending to things properly …recording what needs to be recorded. I also fear that we are running out of time … just when we are getting somewhere, it will be time to end and I will not have answered my questions.

Illustration #2: Mimi reflecting on my development during our final group meeting:

> I found this more challenging to uncover Shakiyla's shift during the process at first since she was serving as the facilitator. However, I did see that she stepped back at times and didn't chime in [during] some situations where she might have before. Shakiyla began to let go a bit of her perfectionist tendencies and allow the space we were in to develop as it did. Not seeking to answer the problems and/or challenges of the group and allowing others to do so.

Both of these passages illustrate my struggle with wanting everything to go perfectly or smoothly in the group and my desire to control the outcome while also attempting to facilitate a collaborative, ambiguous process. The second illustration shows how I developed beyond my need for control and perfection over time, my ability to both hold and let go. Again, this generally mirrored the group's development as a system over time.

Learning #10: Managing Polarity and Ambivalence

In considering the developmental arc of the group and a key aspect of the functioning of our system, a curious polarity or tension was present throughout that characterized our work together and also threatened it. Specifically, there was an unevenness in participation and engagement in the group that manifested as an underlying ambivalence—a push-pull between a desire to develop and a desire to shut down and withdraw. This powerful system-level polarity often exerted itself as individual member developmental edges that surfaced over and over again. In this way, like most polarities, it was something to be managed rather than solved once and for all.

I did not realize this until almost toward the end, and perhaps I am still coming to realize this. As the group's convener and facilitator, the challenge of this polarity bothered me; though it was par for the course, it was also a threat that slowed—and sometimes threatened to end—the group. This was particularly so since much of this ambivalence went unnamed for a time and often manifested as reasonable and unrelated constraints, such as limited time and competing priorities. Additionally, the ambiguity of the group likely added to this dynamic and difficulty. For a group whose center of gravity is Achiever moving into Redefining, ambiguity and lack of structure or concrete results is challenging. So, in this way, we were all at our edge, and holding the group and its ambiguity was a challenge without some larger internal vision/commitment on the part of each member and specific system-level holding structures and facilitation.

Further into our group process, some members noticed and explicitly articulated feelings of fear and ambivalence about the group's work, wanting to remain committed to the group while also wanting to avoid the group's work. In these moments, we were able to recognize how seemingly unrelated and reasonable constraints were also employed as strategies to avoid developmental work. During one meeting, Danielle described her experience of holding back on how deeply she would engage the group's work:

> I am very fearful of doing this work because of the experience of the last therapy
> session [previously experienced outside of the group], which caused a tremendous
> change. So you had this foundation of yourself that got re-examined. It really
> was core work. So even when I was doing my shadow work, I was like okay, uh-
> uh, can't use that one. I'm not going to explore that right now because it might
> unravel too many things. I can't deal with it right now … so then I chose

something that I knew would be safer because I feel like I had the capacity to

handle that and I didn't want to deal with the repercussions of doing deeper work

on something else. And that this is a true thing that I know will come up as I

explore this [developmental work of the group] and it's whether I am willing to

delve into that ... I feel I have to put on big girl underwear to be—to stay in the

group.

This was a specific moment of clarity about Danielle's tactics of avoidance and self-

protection. She further described her fears about the outcomes of the group's work:

But what if it causes some catastrophe and unravels my relationships? What will

happen? And then I go into a depression for a year and I'm on my medicines and

then it gets [bad]—what will happen?

This quote also raises an important and legitimate consideration in developmental work,

that development does not come without a loss. Berger (2012) examines extensively the

losses that come with each developmental move. She even suggests that these losses may

be even more acute as one matures and approaches later stages:

Developmental theory shows us that as we grow, we become more aware of the

losses associated with our growth. A baby does not know that when she learns to

crawl, she is giving up the lovely developmental time when she can be content

watching the world from a single seat…. Our losses become more alive to us as

we become more able to think in abstract ways, and we begin to hold more tightly

to our old meaning systems and do not crawl toward the unknown future with

such abandon…. Our adult brains and psyches seem to have a cottage industry set

up to prevent our (emotionally costly and disorienting) learning. (pp. 115-116)

Similarly, during discussions about whether or not to continue with the group beyond the initially agreed upon engagement period, Lily initiated an email that directly named her own and others' ambivalence:

> I felt like everyone else wanted to continue after our last meeting. Now it feels like that commitment and motivation have fizzled out—for whatever reasons. I feel myself starting to withdraw from the idea of continuing too—although I am still on board for the time being … If I'm honest, I'm of two minds about it all. Part of me is fine with the silence because it allows me to withdraw and not bother anymore. There's a way where I don't really want to do this work. I'm tired of analyzing and connecting and attempting change in this format. It's scary and tiresome and I could drop it pretty easily—especially given the other things that I have going on. The other part of me, the part that wants to make some developmental changes, sees the group as something positive, even if I don't feel that positively about it (I should say that I don't feel negatively either). That part is disappointed that our developmental work as a group might be coming to an end—esp. given the other things I have going on … While I'm a little ambivalent, most of me does want the group to continue.

While not all members exhibited this level of awareness or directness about their ambivalence, most members exhibited behavior at some point in the group (as described earlier) that demonstrated conflicting commitments or priorities, ambivalence, and withdrawal. The group struggled with but also grew somewhat in its ability to name and address this. However, this capacity seemed to only have developed as a result of the

year-long process of developing a shared language and developing trust in the group and each other.

In summary, over time we moved from a group of individuals concerned about our own issues, searching for ways to inquire around these with other women, to a system with its own lights and shadows. Specifically, while not completely actualized due to time restrictions, we developed a value for and intention toward becoming a mutually transforming system with shared vision and purpose, and the desire and willingness to influence and be influenced. Furthermore, our system-level functioning became apparent in the way that we enacted our individual lights and shadows in ways that both challenged and served our system by mirroring unexpressed system dynamics. While we were not always aware of it, our individual difference and the archetypal mirroring that it created helped us to develop a rich, spacious system that made space for and reflected all of our consciousness. Finally, our development of collective capacity was speckled with polarity and ambivalence, which we struggled to manage individually and as a system.

CHAPTER 6

CONCLUSIONS

As I sit at my dining room table on this balmy March day in 2016, writing

toward the end of this four-year inquiry, I cannot help but reflect on the start of this

journey. Indeed, I was sitting in this very same spot U-journaling and having an

epiphany about my deepest questions and desires in that moment. They were all about

yearning and change, relationship and community, and the ways I wanted to inhabit my

life and the world. They were also about shadow and the challenge of growing beyond

my current being, knowing and doing. That moment led me to this deeply personal

inquiry, iterations of which I have been living and tinkering with my entire life. In this

iteration, I formally and intentionally invited both close and unfamiliar others into the

inquiring, second-person space with me. This was an unexpressed and unimaginable

hope of mine for many years. This dissertation, and the collaborative developmental

action inquiry it describes, is the third-person result. It has been a transformative journey

for me. Like most transformative journeys, there is no going back, even as I find myself

in the same house, same room, and at the same dining room table from which I started.

Like me, the tenacious reader has come to the end of this third-person account of this

deeply personal collaborative developmental action inquiry. All that remains is for me to

tie up the loose and dangling pieces, imparting some final wisdom from my tale for

posterity. This chapter comprises that effort. In the following pages, I briefly summarize

the key learnings from this inquiry, offer my meta-insights around how these learnings

relate to what is already known, and discuss their implications for future research and practice. In congruence with the paradigmatic approach of CDAI—which argues that "the question of what constitutes timely action and interaction in any current situation can never be validly solved once and for all for oneself or others, but rather at best grows more engaging of each inquirer and each community of inquiry" (Torbert, 2013, p. 274)—it is important to hold these "conclusions" lightly. They offer useful considerations for others who wish to explore development and/or CDAI as part of their practice and/or research. However, these conclusions are in no way meant to be final, prescriptive, or even generalizable, as each action inquiry requires its own emerging attention to the multiple territories of awareness and the timely action needed in the particular context.

Purpose of Study and Research Questions

As a reminder, the purpose of this action research case study was to explore the experience and facilitation of the evolution of consciousness in adults using the methodology of collaborative developmental action inquiry (CDAI). Specifically, I explored the following research questions:

1. Within the context of a CDAI group, what developmental supports and challenges facilitate the evolution of consciousness of women to more complex capacities and ways of knowing that allow for greater individual and social awareness and effectiveness?

2. How does the context of a CDAI group serve as an effective holding environment for the evolution of consciousness?

3. How does a CDAI group function as a system, and how does it develop collective capacity to evolve consciousness?

In answering these questions, I convened and served as the primary facilitator for a group of seven women (myself included) who met virtually for 12 months to facilitate our own evolution of consciousness using CDAI. We came together to explore our common ontological and epistemological "stuckness," which was limiting our effectiveness professionally and/or personally and causing us a certain amount of suffering. In the next section, I offer several meta-insights about the learnings that surfaced from our inquiry before discussing their implications for future research and practice.

Meta-Insights and Discussion

In the following section, I discuss my meta-insights from the key learnings described in Chapter 5. I organize these by their relevance to constructive-developmental theory (CDT) and the CDAI method. Because CDAI encompasses CDT, the meta-insights related to CDT often have relevance for CDAI, and I will address these directly where appropriate.

Constructive-Developmental Theory

Meta-insight #1: Intentional community is necessary for development. "If you want to go fast, go alone. If you want to go far, go together," so a well-known African proverb advises. While evolution is not ever a fast endeavor, be it alone or in company, the gestalt of this proverb still holds true. The learnings from this inquiry validated a knowing that I had been coming to for many years, that relationship is the crucible of growth. There are certainly theories within the field of psychology, such as Bandura's social learning theory and Imago relationship therapy (Glanz, Rimer, & Lewis, 2002;

Hendrix, 2008), and within the field of adult education and learning (Merriam et al.,2007;

Niewolny & Wilson, 2009) that speak to the importance of human relationships and

social contexts as levers and support for growth and learning. However, as Josselson

(1992) asserts, "Until now, psychological theory of development has occupied itself

instead with explication of the self … Other people have been recognized only as

'objects' for the gratification of instinctual needs and of the needs of the growing and

differentiating self" (p. 1). CDT falls into this tradition, focusing primarily on the

individual as one grows in one's mental complexity and ever-widening construction of

one's experience. CDT does consider individual development in relation to others as it

describes the iterative process of differentiation and integration that occurs at each stage

of development (Kegan, 1982, 1994). Additionally, Kegan (1982, 1994) describes the

types of holding environments and "cultural surround" that may aid the development of

individuals from one stage to another. However, development is mostly described as an

individual process that occurs within either helpful or non-helpful relationships, cultural

surrounds, or holding environments, and CDT does not go into detail about intentionally

facilitated development. This study extends CDT by offering that relationships or

intentional communities of practice and inquiry are not merely supportive of growth but

necessary for it, especially for those making the move into post-conventional stages.

Relationships or intentional communities of practice and inquiry have a unique potential

and ability to elicit the "disorienting dilemma" described in transformative learning

theory (Mezirow & Associates, 1990). One's developmental edges and shadows often

emerge in response to others. Additionally, relationships and inquiry communities

provide opportunities for individuals to discover and challenge their taken-for-granted

assumptions and perspectives, receive feedback about their behavior and its impact on others, and practice new ways of being and acting. In this way, relationships and inquiry communities serve as classrooms for individual development. This insight, which arose from our direct experience in this study, supports the findings of other studies that utilized CDAI—that communities of practice and inquiry matter (Banerjee, 2013; Miller, 2012; Nicolaides & Dzubinski, 2015). All three CDAI studies described earlier note that the second-person space of inquiry and practice was crucial in helping co-inquirers build the interpersonal capacity necessary for their individual and collective learning and perspective shifts. Additionally, this and the other studies provide support for the importance and real possibility of foundational communities of inquiry described within CDAI (Torbert & Associates, 2004). Specifically, CDAI suggests that individuals form "real-time cultures of inquiry, mutuality, and timely action at work, in personal relationships, and in spiritual, political, and artistic actions" (Fisher, Rooke, & Torbert, 2003, p. 175)—a direct acknowledgement of the need for and benefit of developing within and through our relationships and communities. Torbert and associates (2004) discuss foundational communities of inquiry as potentially larger (i.e., organizations), more formal cultures of inquiry, but described these as mostly "theoretical" and "mythical," connected to the rare, later stage action logic of Alchemist. However, I would add that while not all communities of practice and inquiry may function in the idealized state of a foundational community of inquiry—as ours certainly did not— communities of practice and inquiry are crucial for development at any stage, particularly for those wanting to develop into post-conventional stages.

This is a timely insight. Society is entering (or rather has entered) what can be called the interdependent age. The world has often been described as a global community; its problems are complex and potentially catastrophic in ways that require the best insights and perspectives of diverse stakeholders. Increasingly, individual and ordinary citizens are being called upon to grapple with diversity and difference in their everyday lives in ways that were not typical even a generation ago. This state of affairs highlights not only the need for development beyond the Self-authored stage (or Achiever action logic), but also the need for more practice settings and approaches to development that feature opportunities to engage relationally. Put into developmental language, we need more opportunities to practice and inquire around the continual process of individuation and integration (Kegan, 1982, 1994). This speaks to the importance of growing in relationship to others.

Meta-insight #2: Horizontal development is crucial. Again, this meta-insight came at the cost of my prior preference for and privileging of vertical development. However, through the work of our group, I learned that horizontal development—that is, consolidation and stabilization within one's center of gravity stage—is just as, if not sometimes more, important as realizing a complete stage change. This insight is connected to my third meta-insight, which will be described shortly, that development is uneven and incomplete. Within each stage, there are multiple lines of development, including the cognitive, interpersonal, and intrapersonal, among others (Kegan, 1994; Wilbur, 2007).   Individuals may not be fully consolidated or stable within their current stage or action logic or able to think and act according to their most complex stage. For example, in our group, Lily measured as a late Achiever; however, in professional

contexts, she typically experienced and expressed herself interpersonally through the Diplomat action logic, which is two actions logics earlier. In cases like this, horizontal development, or rather a "filling out" across lines, may be more useful to an individual bringing her or his most complex capacity to bear in more situations and contexts. In Lily's case, her work required her to be at least an Achiever; however, she was not able to act from this action logic, which represented part of the difficulty that brought her to the group in the first place.   Like me, constructive-developmental theory tends to privilege and speak more about vertical, or stage-to-stage development, rather than within-stage consolidation (Berger, 2012; Kegan, 1982; Torbert & Associates, 2004). To be fair, Kegan (1994) is sympathetic to and cautions against forcing development or even over-valuing development for development's sake. He speaks less of later-stage development, arguing that adults need only evolve to the stage most useful to meet the demands of their lives—an epistemological demand-capacity "fit" described earlier. He posits that the current demands of adulthood for most adults in the 21st century require at least a Self-authored form of mind—or an Achiever action logic, in CDAI terminology (Kegan, 1994; Torbert & Associates, 2004). Similarly, Cook-Greuter (2010), who has contributed significantly to the understanding of post-conventional stages, has also been the most critical of the idealization of later stages and the continuous push for vertical development. Still, these admonitions feel like proverbial drops in the bucket within the overall development literature. Development is typically described as a linear, forward- and upward-moving trajectory that confers greater ability and effectiveness. Certainly, much of the literature shows that greater epistemologic complexity and capacity allows for an expanded perspective and range of behavioral options that do not exist at earlier

stages (Banerjee, 2013; Brown, 2012; McCallum, 2008; Nicolaides, 2008; Rooke & Torbert, 2005). However, there is little discussion about the nuances of development. Torbert (2013) describes, in both colorful language and a twisting, convoluted digital image, the non-linear complexity of development—particularly the enactment of the later action logics. He writes, "A metaphor that better communicates the unexpected twists that an action logic engages in as it transforms toward wider inclusiveness might be 'a backward stumbling double somersault through a trap door.'" (p. 270). Our notions and descriptions of the range of possibilities for development should expand to explicitly incorporate the "backward stumbling double somersault through a trap door" process that it is. Berger (2012) is one of the few developmental scholars who discusses the notion of multiple options for intentional development beyond vertical development, including consolidation and stabilization of one's current stage. In her developmental coaching work, she delineates strategies for consolidation within one's current stage and for growth to the next stage. This inquiry supports Berger's line of thinking and further highlights the importance of horizontal development and the need for more attention to it in the theory. This may be a much more compassionate and appropriate approach to development for many people and is a legitimate way to assist adults in meeting the various demands of their lives.

Meta-insight #3: Greater complexity of mind does not necessarily lead to more skillful action. This statement speaks to the insight that individuals often do not act from their most complex capacity. This would also suggest that developmental capacity and behavioral effectiveness—or more accurately behavioral alignment—are not necessarily connected. This insight, closely tied to the previous one, further supports the

importance of horizontal development. However, I am making a different point here. Using the earlier example, Lily's late Achiever action logic should theoretically have given her confident access to the ability to mediate between her own goals and values and those of referent others, making decisions that took multiple perspectives into account but that were based on her own mission and values; to willingly accept feedback from others for the purposes of behavioral improvements; and to develop a personal mission that she translated into her professional/organizational setting. However, in reality, Lily struggled immensely with these and did not experience herself as an Achiever professionally. Rather, she was uncomfortable taking and expressing positions, often second-guessed herself when she did take a position, and regularly sought input on ambiguous cases from others whom she deemed as having more expertise for fear of being wrong, although she herself was considered highly skilled and astute in her judgements by others at her job. She has an advanced degree in her field and had, at the time of the inquiry, been working in it for five years in diverse and challenging settings where she had earned a solid reputation; yet, most of her time at work was riddled with paralyzing anxiety and fear of being discovered as incompetent and stupid. In actuality, Lily did typically have strong personal preferences and values, which she was able to express and enact in her family life, even when important others held different preferences and values. Additionally, she was able to take perspective on her Diplomat behavior in her work context and was bothered by it, but she was still unable to act differently. Similarly, Jessie measured as early Redefining—an action logic moving into the post-conventional stage. However, within the group, and even in her personal life, she functioned most comfortably from the earlier Achiever action logic. Even her choice and decision to "not develop" any further

was a very Achiever-like move. Unlike Lily, however, Jessie was unable to take

perspective on her Achiever behavior. What can we make of these discrepancies?

We could take Torbert's (2013) view from earlier, accepting the messy

gymnastics of development and our movement through the action logics that make our

being, knowing, relating, and doing complicated and misaligned. We could also consider

the possibility of fallback—temporary, involuntary regression to an earlier action logic

during times of stress, threat, or ambiguity—as an explanation for these developmental-

behavioral mismatches. However, fallback is typically considered temporary and has the

potential to spur development—once recognized—for those at later stages like the

members of our group (Livesay, 2015; McCallum, 2008). Finally, taking Berger's (2012)

view, we might offer that Lily and Jessie were not fully stable in their most complex

action logic and required further consolidation.

I am less inclined to describe these misalignments as fallback, as these were not

temporary regressions. It is also possible that the etiology of these misalignments is

different for each woman, given that Lily was able to take perspective on her behavior

while Jessie was not. I would agree that these two examples provide further support for

Torbert's (2013) and Berger's (2012) perspectives. I would also offer that this provides a

direct illustration of the unevenness and messiness of development and suggests that the

conceptualization of developmental complexity and the tools with which we measure it

are aspirational, in many cases. Most stage measures are meant to glean the most

complex stage from which a person is able to make meaning and usually privileges the

cognitive lines. This is especially the case with the GLP. Kegan's subject-object

interview (SOI) technically measures all of the lines and Torbert (2014) describes it as

the theoretically most elegant of all the measures. However, the SOI is administered by a trained interviewer through a subjective and interpretive interview process and full consideration of the various lines often depends on the choices and skill of the interviewer. Theoretically, an individual would be able to make meaning using her or his most complex way of knowing in most situations. However, this study suggests that this is not often the case and further illustrates why vertical is not necessarily better than horizontal development. Specifically, because an individual still has access to all of her or his earlier stages, she or he is able enact these, as needed and appropriate, across different contexts and situations. Additionally, because there are different lines of development, across which we are not evenly developed, an individual may involuntarily enact earlier stages—as a default—in different contexts. It is the "involuntary default" issue that I speak to here. This study suggests that individuals have not just one, but potentially multiple "center of gravity" action logics from which they act—and sometimes make meaning from—in different situations and contexts, as an involuntary default. This is a tentative meta-insight, which I am still grappling with since it has possibly significant ramifications for development theory and how we help adults grow. At the very least, the learnings from this inquiry invite continued consideration and exploration of the unevenness of development, and how developmental complexity translates practically in different life domains and contexts. It also highlights the usefulness of CDAI as an ongoing method for cultivating timely awareness of the multiple territories of experience so that one is able to notice and correct these misalignments among intentions, plans, and actions in real-time and in real-life situations. Furthermore, this would also suggest that individuals not only need structures to facilitate

and support development to later stages but that they also need support and practice in enacting their current stage reliably—hence the need for ongoing action inquiry. Next, I turn to my meta-insights around CDAI specifically.

Method: Collaborative Developmental Action Inquiry

Meta-insight #4: CDAI serves as a useful liberating method for evolution of consciousness. We set out to discover if it was possible to facilitate the evolution of consciousness in a group of women using CDAI. For the reasons discussed in detail earlier in this chapter, as well as throughout earlier chapters, I would say that it is. In fact, not only is it possible, but CDAI offers a complex yet elegant ongoing approach and method for cultivating and consolidating development that can enhance personal and professional effectiveness. Torbert (1991) writes:

> The vision of action inquiry is an attention that spans and integrates the four territories of human experience. This attention is what sees, embraces, and corrects incongruities among mission, strategy, operations, and outcomes. It is the source of the "true sanity of natural awareness of the whole." This attention, or "consciousness," is cultivated by personal exercise, peer cultures, and liberating structures. It is one fundamental aim of human development. (p. 219)

This statement describes the breadth and depth of CDAI in cultivating a "living inquiry" and practice at multiple levels (e.g., first-, second-, and third-person) that not only can evolve consciousness but increase the integrity, mutuality, and sustainability of action and inquiry. Throughout this document, I record and describe several instances of double-loop learning or transformation at multiple levels. At the first-person level, I experienced a shift in my meaning-making and facilitation capacity. Specifically, I

experienced a stage change over the course of the two-year study—from Redefining to

Transforming (as measured by the GLP before and two years after the study), which I

attribute in large part to my experience of convening and facilitating the group. This is

not discussed explicitly elsewhere as I bracketed my analysis mostly at the second-person

group level. Furthermore, as discussed earlier, group members were not collectively

tested two years after the study to include this as part of the study methods and individual

outcomes. Additionally, I experienced double-loop learning in my facilitation of the

group, which shifted from Expert/Achiever to Redefining/Transforming. My first-person

experience of double-loop learning and development was not unique for researchers

conducting CDAI studies. Banerjee (2013), Miller (2012), and Nicolaides and Dzubinski

(2015) all describe instances of their own first-person, double-loop learning, suggesting

that enactment of the method provides significant opportunities for development to occur

within the primary researcher, in addition to the participants or co-inquirers. This also

raises the separate but related point that those researchers and practitioners wishing to

utilize CDAI as a methodological approach should be willing and prepared to grow

themselves through the in-action development of the skillsets necessary to convene,

facilitate, and hold a CDAI inquiry. At the second-person level, the group experienced

double-loop learning, or rather a collective shift in our enactment of mutuality and in our

group action logic—from Diplomat to Redefining, as described earlier. Again, this was

consistent with the findings of other studies in which co-inquirers often experienced

changes in their ability to inquire and take action interpersonally (Banerjee, 2013; Miller,

2012; Nicolaides & Dzubinski, 2015). Finally, at the third-person level, the shift toward

a more post-qualitative, in-action methodological enactment, including the non-

traditional presentation and organization of this document, represents an example of double-loop learning. In addition to being an outcome of using CDAI, this particular enactment is consistent with the overall methodological intent and approach of CDAI to engage in simultaneous inquiry and skillful action in each moment (Torbert & Associates, 2004). Indeed, the other studies documented similar double-loop learning and real-time tinkering or adjustments around methods in response to what they found in the course of their inquiries (Banerjee, 2013; Miller, 2012; Nicolaides & Dzubinski, 2015).

As described in earlier chapters, there are several components of the CDAI method that contribute to its developmental potential. However, this study and others (Banerjee, 2013; Miller, 2012; Nicolaides & Dzubinski, 2015) enacted the various components of CDAI differently, suggesting that the usefulness of the method may be in its complex but non-prescriptive and flexible approach. Torbert (1991) mentions the usefulness of "liberating structures" built into CDAI, a concept which serves as a helpful way to consider the CDAI method itself. While there is not an explicit definition and discussion of liberating structures anywhere else in writings about CDAI, Torbert and associates (2004) and others (Fisher, Rooke, & Torbert, 2003) describe the seemingly similar concept of "liberating disciplines" as a "felicitous paradox that may open us to the mystery of effective organizing" or "a set of challenges for questioning (the quality of one's) attention and widening it and one's cognitive-emotional tracking to include the enacted task, process, and mission" (Fisher, Rooke, & Torbert, 2003, pp.187-188). They go on further to describe liberating disciplines as a way of organizing that supports the ongoing practice of using whatever arises (i.e., challenges, dilemmas, tasks, etc.) to

cultivate and generate wider awareness and perspective through courageous questioning and inquiry. Because of the need for an emerging, ongoing, and timely practice, liberating disciplines are also dynamic and meant to evolve with the needs of the community or organization (Fisher, Rooke, & Torbert, 2003).

Torbert (2004) mostly describes liberating disciplines as features of later stage organizations and communities of practice and inquiry; however, I would offer that based on our group's experience, CDAI serves as a liberating method (or discipline) that can hold a variety of developmentally diverse communities of inquiry and practice. Specifically, it does not prescribe specific practices but rather offers the ways of thinking and flexible structures (e.g., four parts of speech, mutuality, attention to the four territories of experience, etc.) that can support developmental work and learning.

Meta-insight #5: Intentional facilitation and the structure of friendship are crucial for enacting CDAI in communities of practice and inquiry. The learnings related to this meta-insight were a surprise to me, mainly because I was focused on the structure and content of the group. While I did pay particular attention to the facilitation, it was mostly as a result of my own personal vigilance, sense of responsibility, and fear-based perfectionism. I did not want to appear incompetent or out-of-control. In response, I built the structure of facilitation around the ambiguity and uncertainty of the group, as a personal buffer and safety net. As it turned out, it worked—and served to hold the group. This particular insight adds to considerations of CDAI and exactly how to create the liberating disciplines described earlier. Because CDAI is generally not a prescriptive method and can be practiced at the first- and second-person levels using a variety of techniques and practices from nearly any relevant tradition, there is limited

discussion and guidance around the mechanics of creating and maintaining a CDAI community of practice and inquiry. In contrast, other action research methodologies, such as collaborative inquiry (Heron & Reason, 2006) and action learning (O'Neil & Marsick, 2007), offer fairly detailed descriptions of how to form and structure communities of practice and inquiry using these approaches. In fact, I utilized Heron and Reason's (2006) guidance when forming our group and recruiting and engaging potential participants since I hadn't a clue where to start. I found this an immensely helpful scaffold and resource. Torbert (1991, 2004) does not focus in any depth on describing or outlining the formation of CDAI communities of practice and inquiry, as CDAI is offered as a "living inquiry" (Torbert, 1991) meant to be practiced primarily in action during the course of one's daily life and relationships. However, CDAI communities of practice and inquiry exist and continue to develop as many people find benefit in practicing the method before and after action for developmental purposes. As such, CDAI might benefit from similar detailed explications of the process and work of a CDAI community of practice, and this study makes a contribution toward this by describing the features of facilitation of a CDAI group that were useful in one context. This is in contrast to previous studies that loosely or incidentally describe—as part of the overall narrative description—the specific enactment of the method for possible replication in other settings (Banerjee, 2013; Nicolaides & Dzubinski, 2015). While Miller's (2012) study does attempt to describe in detail the process of enacting CDAI, her description of methods and interventions are embedded within her overall, rich narrative description as part of the unfolding story of her inquiry and are not always obvious.

Conversely, the challenge (and sometimes absence) of friendship and connection within the group collectively, and its slow development, illustrated its importance. In her exploration of relationship, which includes friendship, Josselson (1992) writes:

> *Friend* is the name we give to someone with whom we experience ongoing mutuality and resonance. In friendship resides companionship, sharing, self-disclosure, and interpenetration of selves. It may also involve loyalty, affection, competition, envy, and a host of other things. Friendship is *we*—what we have created mutually, the invisible bonds of the space between (p. 166).

Josselson's description offers an image of the fullness of friendship that goes beyond sentimentality and "liking" or affection. She names the challenges of friendship, as well as the joys. In another passage, she describes how "anger, conflict, and a good fight" (p. 167) can also bring people closer and serve the development of mutuality. This connects well to the learnings of this inquiry around the importance of friendship, as a structure that holds the work of development in community. Intentional communities of practice and inquiry must cultivate friendship intentionally and consciously as part of the space between members in the development and enactment of the mutuality valued in CDAI. Mutuality is not only about power, as it is (1991, 2004) primarily conceptualized and described in CDAI (Torbert, 1991, 2004). It is also about friendship and connection. It is about taking care of our own needs in balance with the needs of another in service to our mutual connection. It is about commitment to caring and sticking around in moments of challenge and difficulty. The current study demonstrates the importance of friendship and connection in tethering members to communities of practice and inquiry, as well as in the creation of the holding environment for development. Friendship not only provides

the incentive, safety, and trust to risk being known and seen—and seeing and knowing—but it also provides the support for the emergence of a new self.

The above meta-insights offer ideas and considerations that contribute to, support, challenge, and further complicate key concepts within CDT and CDAI. In conclusion, I would offer a modification of my initial conceptual framework presented in chapter one in Figure 4.
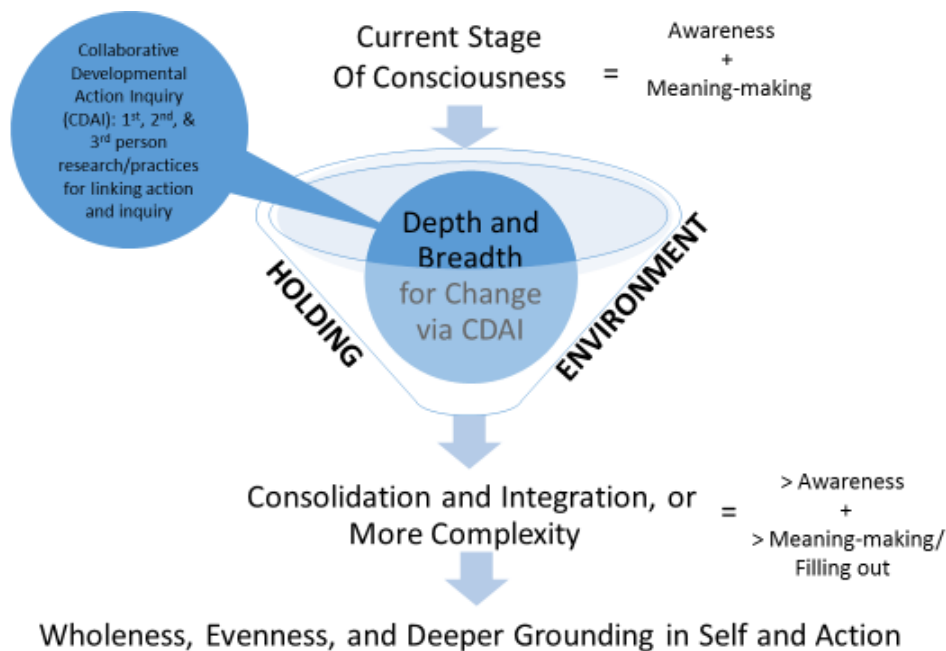

Figure 4. Revised conceptual framework of the facilitation of evolution of consciousness using CDAI.

Figure 4 retains the original's proposition that CDAI creates a deep and broad holding environment for the evolution of consciousness through its use of first-, second-, and third-person research and practices that link action and inquiry. While not explicit in the framework, these include the specific practices and ways of thinking that comprise the

CDAI method and can be enacted flexibly according the context and co-inquirers' focus and interests. The framework has been amended to include explicitly the possibility of horizontal development, or consolidation and integration—a fattening and filling out—in addition to the possibility of vertical development. Furthermore, as indicated by the framework, development can include or be expressed as not only increased awareness and meaning-making complexity, but also increased awareness and filling-out of more parts of oneself. More significantly, this consolidation and integration can result in more wholeness, evenness, and grounding in oneself (including one's most complex way of knowing) and in more skillful action across various life domains. While the figure is presented somewhat linearly for clarity's sake and as a result of its flat representation, the new languaging is meant to imply a departure from the mostly linear, forward-moving, and thrusting quality of vertical development into a loopy, fat and wide, and expansive conception of development that makes space for both possibilities. Perhaps, the next iterations of CDAI studies can explore and better represent this meta-insight and shift, which leads me to my next considerations. In the next sections, I discuss the implications of these for future research and practice.

Implications for Future Research

This inquiry offers several contributions to and implications for theory and future research. Perhaps the most obvious contribution is its illustration of CDAI in action. While there are presumably many groups of people practicing CDAI in intentional communities of inquiry and practice, some of which have been described by Torbert (2004) and others (Rudolph, Taylor & Foldy, 2001), there are very few detailed descriptions of these and their outcomes (Banerjee, 2013; Miller, 2012; Nicolaides &

Dzubinski, 2015). Furthermore, the details of how they function and how their structures

and processes contribute to their effectiveness are typically glossed over when

mentioned. This inquiry provides a thick description and analysis of the work and

development of a CDAI group with all of its snares, plot twists, triumphs, and dramas.

Not only is this relevant for practice, but it offers suggestions for further inquiry into how

CDAI might work to facilitate development and which components may be particularly

salient. Furthermore, this inquiry offers a rare enactment and description of CDAI in a

non-organizational context, which is particularly notable. Torbert (1991, 2004)

highlights the importance and usefulness of practicing CDAI in all of life's contexts. He

describes CDAI as a radically subjective and intersubjective social science paradigmatic

approach that promotes a "living inquiry" (Torbert, 1991, p. 258) that allows us to engage

in "real-time" triangulation between our first-, second-, and third-person research and

practice in our loving, working, playing, and praying (Torbert, 1991, 2013). That is to

say that CDAI is meant to be lived and practiced in natural contexts and all areas of life.

Toward this exploration, Torbert (1991, 2015) has offered, along with the approach, his

own illustrations of this living inquiry across multiple life domains and endeavors, from

practicing and inquiring with faculty colleagues in order to transform the culture at a

prestigious business school (Torbert, 1991) to exploring the difficult and juicy first- and

second-person dynamic of eros and power with a longtime friend (Bradbury & Torbert,

2015). Yet, beyond these bold and provocative examples provided by the theorist

himself, CDAI has mostly remained an approach siloed within primarily hidden

communities of practice and inquiry, or offered to business clients covertly by a handful

of consultants knowledgeable about the method. As a result, its use, study, and further

development as a social science paradigmatic approach within academic discourse has been limited. This inquiry contributes to the academic and theoretical discourse of an explicit elucidation of CDAI methods as an action research approach toward radically subjective and intersubjective research and practice, including its presentation. It is important that I explicitly note, however, that given the merging of research and practice in CDAI and its promotion of living inquiry, further development of the theory/method need not come solely from the academy. Indeed, one might argue that given its departure from the mostly positivist paradigm in most universities, many academics may find it challenging to learn, practice, and build a research career around this type of paradigmatic approach within the currently structured academic (and funder) value and reward system. As such, practitioners and scholar-practitioners also have much to contribute to knowledge, and can and should offer their experiential insights toward furthering the method. One immediate contribution, which follows logically from the above discussion, is a more detailed description and guide or toolkit around enacting CDAI in communities of practice and inquiry.

Related to the previous contribution, this study also points to the need for more first- and second-person research within the social sciences in general, and as it relates to CDAI more specifically, especially within non-organizational settings. As part of this, there is a need for more illustrations of first- and second-person research and delineations of first- and second-person methods and representations across more diverse disciplines. More specifically, this study as well as Miller's (2012) and Nicolaides and Dzubinski's (2015), in particular, highlight the attention to the second-person space between the co-inquirers. This study and Miller's (2012) both tell the second-person research story using

a radically-subjective, first-person narrative. Further exploration, development, and elucidation of these approaches and methods is important, for action research and CDAI. As described in more depth in Chapter 3, I often resorted to methodological tinkering, or rather experimentation in data collection and analysis, to meet the emerging demands of this inquiry—a type of action inquiry in and of itself, and a double-loop change. Usually, it was after I had already enacted or almost completed a particular phase of the study or method (e.g. "reflective, provocative interviews," post-qualitative data analysis, etc.) that I would serendipitously stumble upon the guidance and/or validation for the approach I had used. This made this already complex work even more challenging than what it perhaps needed to be. The first- and second-person research methods, it seemed—much like the inquiry—were always two steps ahead of me. I did not know, for example, that there was a robust and burgeoning tradition of "mangled" and interpretive qualitative data analysis—similar to what I was doing—lumped under a paradigm called post-qualitative research (Jackson, 2013; Lather, 2013; St. Pierre, 2014). As St. Pierre (2014) describes, there is limited guidance and support for research that emergently connects epistemology, ontology, and methodology such that the knowledge and presentation produced is fresh, relevant, and timely. Following this with Torbert's (2013) assertion that social science research as currently practiced is better versed in and over-privileges third-person research, there is a need to expand and update our scientific approaches and evidence base to better address the complex, practical concerns of today. This underscores the need for thoughtful and rigorous examples of and guidance around first- and second-person research that is emergent and timely.

Finally, this study highlights the need for more longitudinal studies of applications of CDAI that include robust third-person data. This recommendation specifically speaks to a limitation of this study, namely that the group did not convene long enough to witness and objectively measure any stage changes in members. While we collected first- and second-person data around members' perceived development, the study would have been strengthened by a post-group GLP measurement. Certainly, one could not say for certain, as you could with a randomized-controlled trial, whether or not a stage change was due to participation in the group alone—which was not really the point. However, third-person data would be valuable in determining and making sense of the varied outcomes stemming from CDAI, including vertical development. Such data may also yield other, more nuanced insights such as the percentage of individuals who typically experience a stage change after such action inquiry, which action logics seem to experience the most "benefit" or development—objectively speaking—from a community of practice and inquiry, etc. Other important nuances could be considered and studied, such as around how individuals develop horizontally, consolidate their current stage, and reliably make meaning and act from their most complex stage across different life domains and contexts. Related, this inquiry suggests the need for the development of additional instruments or adaptations of current instruments (e.g., the GLP or SOI) that more precisely and intentionally measure horizontal integration. Furthermore, longitudinal studies would also have the opportunity to examine the first-, second-, and third-person impact of practicing CDAI over time within individuals' various personal and professional contexts. These are the primary implications that this

inquiry has related to theory and research. Next, I discuss the practice implications of this study.

Implications for Practice

This inquiry makes several contributions to practice, specifically to those who want to develop and/or facilitate development within communities of inquiry and practice. First, conveners of groups and developmental communities of practice and inquiry should pay particular attention to the facilitation of groups and the second-person, relational space of groups. This seems obvious once stated; however, it's very much like the obvious answer that is often overlooked. Indeed, despite my careful attention to and facilitation of the group, it was not obvious to me in the beginning. It was only through the experience and challenges of convening the group, as well as my experience of ineffective facilitation in the second phase of the group and in other communities of practice to which I belong that this became apparent. There are a few reasons why this is such a relevant practice contribution. Specifically, communities of practice and inquiry, such as CDAI, which function collaboratively and are based on a distributed leadership model, have the unique potential to overlook or take for granted the importance of structure and good "holding" around the "mundane," process-oriented, organizational aspects of effective group functioning (e.g., scheduling meetings, sending out meeting reminders, securing and preparing the meeting space, keeping minutes, prodding members, moving decision-making processes along, etc.). Proactive and attentive facilitation holds a group when busy schedules, competing commitments, and disengagement emerge to threaten members' commitment to and level of participation in the group. In this way, groups benefit from assigning specific individuals to facilitate the

group and vigilantly attend to these unavoidable, more instrumental aspects of group functioning, even if this is shared or rotated. Another related reason why attention to facilitation is important is because attentive facilitation of a group can be a developmental practice in and of itself. As discussed in the learnings, it requires not only specific skills (e.g., organization, follow-through, etc.), but it may require a certain level of developmental capacity. While I had at least a certain level of facilitation skill and developmental capacity, I found facilitation of the group both challenging and developmental. At every turn, I found myself needing to build capacity to facilitate the group, such that the experience was one of growth for me. This fact also underscores the possibility that the group facilitator may need support and instruction around performing this role and its related responsibilities. Needless to say, communities of practice and inquiry should pay explicit attention to the practice and quality of the facilitation as a form of holding (and potentially developmental practice).

Additionally, the relational, second-person aspects of groups are important to attend to, beyond the specific content and practices or purposes for gathering. Communities of practice and inquiry, especially those just forming, should pay particular attention to the development of friendship and connections among members that lay the foundation for trust, respect, and caring. Based on comments and suggestions made during post-group discussions with the members of our CDAI group, I might have suggested structures and activities to facilitate members getting to know each other separately outside of the group. For example, one practice that I have experienced in another group context (after our group ended, unfortunately) is to have members pair up with at least two other people—whom they don't know well— individually to either meet

in person (if possible) or via video call (e.g., Skype) for an hour. This allows members to get acquainted and possibly spark a deeper connection that can be built upon over the course of the group. In my experience of this practice, I formed an initial deep bond with the two new people I spoke with preceding a community of practice gathering that carried us throughout our experience together. In one case, our connection was so natural that we have remained friends and in contact beyond the group setting and experience. Another practice, which I also experienced later in the same group context just mentioned, is to have members write and share brief autobiographical narratives about themselves and their developmental journeys throughout the course of their lives. My experience of these was one of recognition, awe, and deep appreciation for the diversity of human experience, as well as for our individual and collective efforts to become whole and alleviate our own and others' suffering. I also had the distinct feeling of finding "my tribe" among these "strangers" and fellow seekers with whom I was to share a unique and intimate experience—and this was before I had met any of them. These are just a couple of examples of the ways that groups can attend to and build in structures that intentionally facilitate friendship and deeper connection among members. Certainly friendships and connection may develop through multiple group interactions; however, this can take a great deal of time. Additionally, when doing extremely vulnerable, intimate, and potentially difficult work in community, having a good foundation of knowledge and connection serves as a useful holding.

Beyond attending to the formation of friendships and connections at the start of a group, the second-person space of the group should be attended to and managed throughout. Not only is this necessary for continued maintenance of the holding

environment, but as mentioned above, it is a key part of the developmental potential of groups. The mirroring and triggering that arises in relation to others with whom we are engaged in meaningful, tender work provides the fodder for consciousness to emerge and potentially evolve. As such, effective groups and their individual members must develop the capacity for and practice of naming and inquiring around interactions, tensions, and developmental edges that emerge in the course of group work. Friendship—in all of its twists and turns—is part of what makes this safe and possible.

Finally, another important implication for practice is that conveners of CDAI groups and other communities of practice and inquiry should anticipate and incorporate structures to address and manage ambivalence and developmental edges. People are not always aware of what they are getting themselves into when they elect to take a developmental journey; fear, ambivalence, and resistance often arise on the path. In fact, this suggestion extends beyond developmentally focused communities of practice and inquiry to include support and therapeutic groups, and learning communities. McCallum (2008) made a similar recommendation around his finding of the ubiquitous experience of fallback in Tavistock Conference attendees.

The process of consciously seeking to learn and develop in adulthood oftentimes is imagined as challenging, but overall as one of possibility, potential, and forward-movement, especially when voluntary and intentional.   In our group, we found that as we sought to discover and develop ourselves, we experienced a continuous and unrecognized encountering of and fleeing from the old self that threatened that very learning and development. As illustrated by the group's experience, when engaging in intentional and supported developmental work, particularly in non-therapeutic contexts, blindspots and

developmental edges will continuously emerge in the developmental journey. The

experience of loss of the old self and fallback should also be considered and expected.

These occurrences should not only be anticipated but directly addressed. Individuals and

groups seeking learning and development must develop their capacity and

complementary practices and systems to recognize, name, and work with these

challenges in order to effectively support the developmental process. One possible tool

or structure that may help to address the ambivalence and resistance that inevitably arises

is polarity management through the creation of a group polarity map (Johnson, 1992).

Specifically, the polarity management and mapping process is a structured first- and

second-person approach by which an individual or group can address intractable

problems that require ongoing management rather than one-time intervention and

solution. Through the polarity mapping exercise, groups can explore and name specific

polarities (e.g., collaboration/competition, commitment/resistance, etc.) that may be

arising in their group dynamic and hindering change or progress. As such, a group

polarity map is one specific structure that may help make the ambivalence that arises in

communities of practice and inquiry object to both individuals and the system.

Additionally, CDAI can serve as a liberating discipline that may benefit any

group in creating a holding environment that not only supports growth and learning but

also supports people through difficult work and processes. CDAI offers a useful method

and set of tools to manage and "work with" blindspots and developmental edges. The use

of naming and inquiring, for example, is particularly critical in spurring thinking around

and recognition of these challenges, especially as the nature of blind spots and

developmental edges necessarily make them difficult, if not almost impossible, to

recognize in oneself. Indeed, just the mere act of acknowledging and giving voice to this phenomenon and our particular manifestations of it changed the group dynamic and increased our capacity to address our developmental edges.   As such, our group intentionally began practicing and using these approaches to "catching" ourselves in the act in "shutting down" or fleeing, which dramatically shifted the quality of our learning. Furthermore, the support of our co-inquirers and our ability to see and catch each other was critical to the success of our process and learning. CDAI, then, provided not only a useful, but a necessary method and structure for learning and developing through blind spots and developmental edges rather than fleeing from them. Certainly, it is through the conscious and continuous search, encounter, naming, recognition, and integration of the self and its developmental edges in a community of supportive and courageous others that the possibility of development emerges.

Epilogue

As I close out this particular iteration of my ongoing personal action inquiry into the evolution of consciousness, I do so with mixed thoughts and feelings. I entered this inquiry through a sincere desire to better understand and address my own feelings of being "in over my head" and "stuck," and my struggle to navigate the shifting ontological and epistemological demands of adulthood. Through this process, I discovered that doing this developmental work in the company of others is not only theoretically sound but necessary. We are all simultaneously whetstones, arms, and mirrors for each other, in the same way that we are alternately constituted and reconstituted by each other and by ourselves in relation to each other. I also discovered that it is possible to facilitate the evolution of one's consciousness, though others may argue convincingly otherwise.

Developmental work is also an incredibly tender, triggering, tumultuous, slow, and disappointing endeavor. Development may or may not come, and if it does, it comes in fits and starts. It is neither purely vertical, horizontal, nor straightforward, but messy, uneven, and incomplete. That said, my deeply abiding belief in the possibility of human growth and evolution of consciousness toward a greater wholeness and awareness that makes our living and loving more tenable was further strengthened by this inquiry. However, added to that belief is a more explicit and experiential knowing that we are always in a state of becoming, that "there is no *there* there." We are always partially in shadow, our full awareness of ourselves forever just beyond the horizon. The light enters into one area, casting shadow in another. Or put another way, we are like onions, with ever more layers left to peel. At least, this is my experience of myself. Perhaps it really is more about the journey rather than the destination, our quest to evolve giving what might otherwise be a dull survival— punctuated by fleeting happiness and excitement— some meaning. Somehow, rather than disappoint, that notion gives me solace and further feeds my insatiable curiosity, providing justification for my ongoing living inquiry. Given my mish-mash of thoughts and feelings, it is fitting that I end this particular iteration with the words of poet and philosopher David Whyte (2014), who wrote that self-knowledge

> is not fully possible for human beings. We do not reside in a body, in a mind or a world where it is achievable or from the point of being interesting, even desirable. Half of what lies in the heart and mind is potentiality; resides in the darkness of the unspoken and unarticulated and has not yet come into being: this hidden unspoken half of a person will supplant and subvert any present

understandings we have about ourselves. Human beings are always, and always

will be, a frontier between what is known and what is not known … We are

neither what we think we are nor entirely what we are about to become, we are

neither purely individual nor fully a creature of our community, but an act of

becoming that can never be held in place by a false form of nomenclature. No

matter our need to find a place to stand amidst the onward flow of the world, the

real foundation of the self is not in self-knowledge, but in the self-forgetfulness

that occurs when it meets something other than the self it wanted to know. (pp.

199-202)

REFERENCES

Argyris, C. (1995). Action science and organizational learning. *Journal of Managerial Psychology, 10*(6), 20-26.

Argyris, C., & Schon, D. A. (1974). *Theory in practice: Increasing professional effectiveness*. San Francisco, CA: Jossey-Bass.

Banerjee, A. (2013). *Leadership development among scientists: Learning through adaptive challenges* (Unpublished doctoral dissertation). University of Georgia, Athens, Georgia.

Barlas, C., Kasl, E., Kyle, R., MacLeod, A., Paxton, D., Rosenwasser, P., & Sartor, L. (2000). Cooperative inquiry as a strategy for facilitating perspective transformation. In C. Weissner, S. Meyer, & D. Fuller (Eds.), *Challenges of practice: Transformative learning in action. 3rd International Transformative Learning Conference Proceedings* (pp. 51-56). New York: Columbia University,

Berger, J. G. (2012). *Changing on the job: Developing leaders for a complex world*. Stanford, CA: Stanford University Press.

Bradbury, H., & Torbert, W. (2015). *Eros/power: Love in the spirit of inquiry, transforming how women and men relate.* Tucson, AZ: Integral Publishers.

Bridges-Rhoads, S., Van Cleave, J., & Hughes, H.E. (2015). Complicating methodological transparency. *International Journal of Qualitative Studies in Education, 29*(4), 1-17.

Brookfield, S. D. (1987). *Developing critical thinkers: Challenging adults to explore alternative ways of thinking and acting*. San Francisco, CA: Jossey-Bass.

Brown, B. C. (2012). Leading complex change with post-conventional consciousness. *Journal of Organizational Change Management, 25(*4), 560-577.

Coghlan, D., & Brannick, T. (2010). *Doing action research in your own organization.* Thousand Oaks, CA: Sage Publications.

Cook-Greuter, S. R. (2004). Making the case for a developmental perspective. *Industrial & Commercial Training, 36*(6/7), 275-281.

Cook-Greuter, S. R. (2010). Second-tier gains and challenges in ego development. In S. Esbjorn-hargens (Ed.), *Integral theory in action: Applied, theoretical, and constructive perspectives on the AQAL model* (pp. 303-320). Albany, NY: State University of New York Press.

Cranton, P. (1996). Types of group learning. *New Directions for Adult and Continuing Education, 71*, 25- 32.

Creswell, J. W. (2009). *Research design: Qualitative, quantitative, and mixed methods approaches.* Thousand Oaks, CA: SAGE Publications.

Drago-Severson, E. (2009). *Leading adult learning: Supporting adult development in our schools*. Thousand Oaks, CA: Corwin Press.

Dyer, B., & Loytonen, T. (2012). Engaging dialogue: Co-creating communities of collaborative inquiry. *Research in Dance Education, 13*(1), 121-147.

Dzubinski, L., Hentz, B., Davis, K. L., and Nicolaides, A. (2012). Envisioning an adult learning graduate program for the early 21st century: A developmental action inquiry study. *Adult Learning, 23*(3), 103-110.

European-American Collaborative Challenging Whiteness. (2002). A multiple-group
    inquiry into whiteness. *New Directions for Adult and Continuing Education*,
    2002, 73-82.

Fisher, D., Rooke, D., & Torbert, B. (2003). *Personal and organizational*
    transformations through action inquiry. Boston, MA: Edge/Work Press.

Foster, P. (2012). Collaborative developmental action inquiry. In D. Coughlan & M.
    Brydon-Miller (Eds.), *Sage encyclopedia of action research management*.
    London: Sage.

Glanz, K., Rimer, B. K., & Lewis, F.M. (Eds.). (2002). *Health behavior and health*
    education: Theory, research, and practice (3rd ed.). San Francisco, CA: Jossey-
    Bass.

Greene, J. C. (2013). On rhizomes, lines of flight, mangles, and other assemblages.
    International Journal of Qualitative Studies in Education, 26(6), 749-758.

Hendrix, H. (2008). *Getting the love you want: A guide for couples* (20th anniversary
    ed.). New York: Henry Holt and Company.

Heron, J. (1996). *Co-operative Inquiry: Research into the human condition*. London:
    Sage Publications.

Heron, J., & Reason, P. (2006). The practice of co-operative inquiry: Research with
    rather than on people. In P. Reason & H. Bradbury (Eds.), *Handbook of action*
    research: Participative inquiry and practice (pp. 144-154). Thousand Oaks, CA:
    Sage Publications.

Herr, K., & Anderson, G.L. (2005). *The action research dissertation: A guide for*
    students and faculty. Thousand Oaks, CA: Sage Publications.

Hooks, B. (2000). *All about love: New visions.* New York: HarperCollins Publishers.

Hooks, B. (2001). *Salvation.* New York: HarperCollins Publishers.

Hooks, B. (2002). *Communion: The female search for love.* New York: HarperCollins
Publishers.

Jackson, A. Y. (2013). Posthumanist data analysis of mangling practices. *International
Journal of Qualitative Studies in Education, 26*(6), 741-748.

Johnson, B. (1992). *Polarity management: Identifying and managing unsolvable
problems.* Amherst, MA: Human Resource Development Press.

Josselson, R. (1992). *The space between us: Exploring the dimensions of human
relationships*. San Francisco, CA: Jossey-Bass Publishers.

Kahn, W.A. (2001). Holding environments at work. *Journal of Applied Behavioral
Science, 37*(3), 260-279.

Kasl, E., & Yorks, L. (2002a). An extended epistemology for transformative learning
theory and its application through collaborative inquiry. *TC Record Online*.
Retrieved from http://www.tcrecord.org/Content.asp?ContentID=10878

Kasl, E., & Yorks, L. (2002b). Collaborative inquiry as a strategy for adult learning:
Creating space for generative learning. *New Directions for Adult and Continuing
Education, 94*.

Kasl, E., & Yorks, L. (2002c). Collaborative inquiry for adult learning. *New Directions
for Adult and Continuing Education, 94*.

Kasl, E., & Yorks, L. (2002d). Learning from the inquiries: Lessons for using
collaborative inquiry as an adult learning strategy. *New Directions for Adult and
Continuing Education, 94*.

Kegan, R. (1982). *The evolving self: Problem and process in human development*. Cambridge, MA: Harvard University Press.

Kegan, R. (1994). *In over our heads: The mental demands of modern life.* Cambridge, MA: Harvard University Press.

Kegan, R. (2009). What "form" transforms?: A constructive-developmental approach to transformative learning. In K. Illeris (Ed.), *Contemporary theories of learning: Learning theorists in their own words* (pp. 35-52). New York: Routledge.

Kegan, R., Broderick, M., Drago-Severson, E., Helsing, D., Popp, N., & Portnow, K. (2001). *Toward a new pluralism in ABE/ESOL classrooms: Teaching to multiple "cultures of mind."* Research Monograph. NCSALL Reports# 19. Boston, MA: National Center for the Study of Adult Learning and Literacy.

Lather, P. (1993). Fertile obsession: Validity after poststructuralism. *Sociological Quarterly*, *34*(4), 673-693.

Lather, P. (2013). Methodology-21: What do we do in the afterward? *International Journal of Qualitative Studies in Education, 26*(6), 634-645.

Lather, P., & St. Pierre, E. A. (2013). Post-qualitative research. *International Journal of Qualitative Studies in Education, 26*(6), 629-633.

Livesay, V. T. (2015). One step back, two steps forward: Fallback in human and leadership development. *Journal of Leadership, Accountability and Ethics, 12*(4), 173-189.

Marshall, J. (1999). Living life as inquiry. *Systemic Practice and Action Research*, *12*(2), 155-171.

McCauley, C. D., Drath, W. H., Palus, C. J., O'Connor, P. M., & Baker, B. A. (2006). The use of constructive-developmental theory to advance the understanding of leadership. *The Leadership Quarterly*, *17*, 634-653.

McCallum, D. C. (2008). *Exploring the implications of a hidden diversity in group relations conference learning: A developmental perspective* (Doctoral dissertation). Retrieved from ProQuest.

Merriam, S. B., Caffarella, R. S., & Baumgartner, L. M. (2007). *Learning in adulthood: A comprehensive guide*. San Francisco, CA: Jossey-Bass.

Mezirow, J. (1981). A critical theory of adult learning and education. *Adult Education 32*(1), 3-24.

Mezirow, J., & Associates (1990). *Fostering critical reflection in adulthood: A guide to transformative and emancipatory learning*. San Francisco, CA: Jossey-Bass.

Miles, M. B., Huberman, A. M., & Saldana, J. (2014). *Qualitative data analysis: A methods sourcebook.* Thousand Oaks, CA: Sage Publications.

Miller, C. T. (2012). *The undergraduate classroom as a community of inquiry* (Doctoral dissertation). University of San Diego, San Diego, CA.

Niewolny, K. L. and Wilson, A.L. (2009). "Social learning" for/in adult education? A discursive review of what it means for learning to be "social." In S. B. Merriam and A.P. Grace (Eds.), *Contemporary issues in adult education* (pp. 340 – 348). San Francisco: Jossey-Bass.

Nicolaides, A. (2008). *Learning their way through ambiguity: Explorations of how nine developmentally mature adults make sense of ambiguity* (Doctoral dissertation). Retrieved from ProQuest.

Nicolaides, A. (2015). Generative learning: Adults learning within ambiguity. *Adult Education Quarterly*, *65*(3), 179-195.

Nicolaides, A., & Dzubinski, L. (2015). Collaborative developmental action inquiry: An opportunity for transformative learning to occur? *Journal of Transformative Education*, *14*(2), 120-138.

Nicolaides, A., & Yorks, L. (2008). An epistemology of learning through. *E:CO Issue 10*(1), 50-61.

O'Neil, J., & Marsick, V. J. (2007). *Understanding action learning.* New York: American Management Association.

Patton, M. Q. (2002). *Qualitative research and evaluation methods.* Thousand Oaks, CA: Sage Publications.

Pruyn, P. W. (2010, June 9). An overview of constructive developmental theory (CDT) [Web blog post]. Retrieved from http://developmentalobserver.blog.com/2010/06/09/an-overview-of-constructive-developmental-theory-cdt/

Piaget, J. (1954). *The construction of reality in a child.* New York: Basic Books.

Reason, P. (1999). Integrating action and reflection through co-operative inquiry. *Management Learning, 30*(2), 207-226.

Reason, P., & Bradbury, H. (Eds.). (2008). *Handbook of action research: Participative inquiry and practice.* Thousand Oaks, CA: Sage Publications.

Rooke, D., & Torbert, W. R. (2005). Seven transformations of leadership. *Harvard Business Review*, *83*(4), 66-76.

Ross, L. (2011, January 28). Re: the origin of the term women of color. Western States Center's Groundwork reproductive justice training and convening [video lecture exerpt]. Retreived from www.youtube.com/watch?v=82vl34mi4Iw

Rossenwasser, P. (2002). Exploring internalized oppression and healing strategies. *New Directions for Adult and Continuing Education, 94*, 53-61.

Roulston, K. (2010). *Reflective interviewing: A guide to theory and practice.* Thousand Oaks, CA: SAGE Publications.

Rudolph, J. W., Taylor, S. S., & Foldy, E. G. (2001). Collaborative off-line reflection: A way to develop skill in action science and action inquiry. In P. Reason, & H. Bradbury (Eds.), *Handbook of action research: Participative inquiry and practice* (pp. 405-412). London: Sage Publications.

Scharmer, C. O. (2006) Theory u, leading from the future as it emerges: The social technology of presencing. *SoL Press: The Shambhala Institute for Authentic Leadership*, September/October.

Scharmer, C. O. (2009). *Theory u, leading from the future as it emerges: The social technology of presencing*. San Francisco: Berrett-Koehler Publishers, Inc.

St. Pierre, E. A. (2014). A brief and personal history of post qualitative research: Toward "post inquiry." *Journal of Curriculum Theorizing*, *30*(2), 2-19.

Torbert, W. R. (1987). *Managing the corporate dream*. Homewood, IL: Dow Jones-Irwin.

Torbert, W. R. (1991). *The power of balance: Transforming self, society, and scientific inquiry*. Los Angeles, CA: Sage Publications.

Torbert, W. R. (1999). The distinctive questions developmental action inquiry asks. *Management Learning, 30*(2), 189-206.

Torbert, W. R., & Associates. (2004). *Action inquiry: The secret of timely and transforming leadership*. San Francisco, CA: Berrett-Koehler Publishers.

Torbert, W. R. (2013). Listening into the dark: An essay testing the validity and efficacy of collaborative developmental action inquiry for describing and encouraging transformations of self, society, and scientific inquiry. *Integral Review, 9*(2), 264-299.

Torbert, W. R. (2014). Brief compasrion of five developmental measures: the GLP, the MAP, the LDP, the SOI, and the WUSCT. Retrieved from http://www.williamrtorbert.com/global-leadership-profile/scientific-validity-of-the-glp/

Wilber, K. (2007). *Integral spirituality*. Boulder, CO: Shambhala Publications.

Wilbur, K., Patten, T., Leonard, A., & Morelli, M. (2008). *Integral life practice: A 21st-century blueprint for physical health, emotional balance, mental clarity, and spiritual awakening.* Boston, MA: Integral Books.

Winnicott, D. W. (1960). The theory of the parent-infant relationship. *International Journal of Psychoanalysis, 41*, 585-595.

Weinberg Zelman, A. (2002). Nurturing intuition through group learning. *New Directions for Adult and Continuing Education, 94*, 33-42.

West, C. (1994). *Race matters.* New York: Random House.

Wherrett Roberson, W. (2002). Midwife to a learning community: Spirit as co-
inquirer. *New Directions for Adult and Continuing Education*, *94*, 43-52.

Whyte, D. (2014). *Consolations: The solace, nourishment and underlying meaning of everyday words.* Langley, WA: Many River Press

Yin, R. K. (2014). *Case study research: Design and methods.* Los Angeles, CA: Sage Publications.

Yorks, L., & Nicolaides, A. (2013). A conceptual model for developing mindsets for strategic insight under conditions of complexity and high uncertainty. *Human Resource Development Review, 11*(2), 182-202.

APPENDIX A

PRE-GROUP REFLEXIVE, PROVOCATIVE INTERVIEW QUESTIONS

The purpose of this conversation is to help me better understand the challenges that bring you to this research/group and how it might assist you in addressing some of these challenges. I have some questions that will guide our discussion.

1. Where are you in your personal and professional satisfaction at this point in your life?
   a. What is working?
   b. What is not working?

2. Can you describe a current demand or expectation from both your personal and professional part of your life that you are struggling to meet?
   a. Please explain why these are a struggle for you.

3. How have you attempted to manage these struggles in the past?
   a. What has been helpful?
   b. What has been less helpful?

4. What is the level of support you currently have in meeting your personal and professional demands?
   a. How adequate it is for you?

5. Based on what you know about this group and the initial plans for it, why are you drawn to this? What are the concerns that you hope the group will address?

APPENDIX B

ACTION RESEARCH INVITATION LETTER

Date

Dear Potential Co-inquirer:

You are receiving this letter either because you have expressed interest in participating in this most unique journey (to be described shortly) or someone else (potentially me) thought you may be interested.   This letter serves as a brief introduction and invitation to participate in a journey of inquiry with a small group of women also engaged in a similar journey. Before describing this journey more formally, first I'd like to provide a little more background and history.

I am a 39 year-old Black woman from Philadelphia who currently lives in Atlanta. I live in a little green house with a skinny brown dog with a bushy tail. We have similar temperaments. I am currently pursuing a doctoral degree in Adult Education. I also work a demanding full-time job in public health and clinical research. As you can imagine, I have a very busy, sometimes overwhelming life. I am a sometimes disciplined, would be writer and voracious reader and lover of words and stories. I love to think and engage in deep and stimulating conversation. I am a practicing yogi and Buddhist who struggles to maintain her daily yoga and meditation practices – but who always comes back to the cushion the same way I always come back to the pen and the mat. They keep me grounded and help me maintain that delicate balance between strength and flexibility. I roller-skate on four wheels, hike, lie on the earth, hug trees and practice energy healing. I also find joy in listening to music and dancing. I am a dreamer and an optimist; I very much believe in people and in the process of life – despite having been occasionally disappointed by both. I am a Taurus and all that that implies - loyal, slow, persistent, and sometimes strong willed. For me, the essence of living is loving, connecting deeply, and growing/transforming. My ultimate goals in life are to grow more fully into myself, live with an open heart, and be of service. I have been moving toward these goals all of my life. I am fiercely committed to them. Yet, I struggle with them daily. Sometimes I feel closer to them than others.   Right now they feel both near and far. I am currently challenged by the busyness of my life. I am struggling to manage the daily necessities of living (as I write this, my front and back yards desperately need to be mowed and there is a huge pile of unfolded laundry in my laundry room) while remaining focused on my higher aspirations and life goals. There is often little time to do the things I love. At the same time, I also feel on the cusp of some major breakthroughs and transformations around how I am in the world and how I am in relationship to my life and some key people in it. Put crisply, I feel on the cusp of another evolution of my consciousness. I have been on this cusp for a couple of years now. The other side feels

nearer, though. I have tried different strategies, including my usual ones – therapy, meditation, etc. - to push myself over. They have been more or less successful, though sometimes I feel stuck and frustrated. My desire to pursue my doctorate was part of this push.

Now, sitting here still on the cusp, I have noticed a few key others who also find themselves similarly challenged. I know that we are not alone. Perhaps you too have been struggling with your own breakthrough and life management – with your own evolution of consciousness. Perhaps you have also tried different strategies and are still struggling.

As part of my doctoral research, I have decided to engage in a deeply personal research study and learning adventure looking into the evolution of consciousness (and facilitators of it) with a similarly challenged and committed, yet diverse group of six to eight women of color. Together, we will form an inquiry group to explore the evolution of consciousness – or evolution in one's way of knowing and making meaning - using a particular Action Research approach from the field of adult education (which we can discuss later if you decide to join us) and take a journey of discovery and new action. Together, we will ask the deep questions and explore the different possibilities of knowing and being in the world. We will learn with and from each other.

Are you willing to participate in a research study and co-inquire with me around our individual and collective experience with evolution of consciousness and transformation?

If these statements resonate with you, contact me at 404-465-1541to express your interest in participating in the group and to find out more information about this study, and if you are eligible.

Sincerely,

Lakeesha (Shakiyla) Smith

APPENDIX C

COLLABORATIVE DEVELOPMENTAL ACTION INQUIRY GROUP

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (MOU) is a brief outline and description of the purpose and expectations of participating in an inquiry group for the following study: COLLABORATIVE DEVELOPMENTAL ACTION INQUIRY INTO THE EXPERIENCE AND FACILITATION OF THE EVOLUTION OF CONSCIOUSNESS. In line with the consent document that you signed, your participation in this study is completely voluntary and you are free to withdraw your participation at any time. This MOU serves to make clear the commitment and expectations that accompany participation in this group.

1. Statement of purpose

The purpose of this study and inquiry group is to explore the nature and lived experience of the evolution of consciousness in adults and how it informs their ability to better function in the world using the Action Research methodology of Collaborative Developmental Action Inquiry (CDAI). As the name implies, this particular approach is designed to be done collaboratively, that is with researchers and participants working together; takes a developmental approach by considering the increasing levels of mental complexity that individuals use in their interpretations of life events and experiences; and incorporates action with inquiry or reflection, so that group members can learn and experiment with practicing more skillful action in the world.   The hope is that using this approach will allow for the most freedom and benefit in exploring this topic.

2. Participants

The participants in this group will include between six and eight women of color 30 years of age and older who are currently in the midst of a transformative or developmental shift in their awareness and understanding of themselves and their lives – essentially an evolution of consciousness. These women have agreed to actively inquire deeply into this experience in collaboration with other women for better understanding and possibly better facilitation of their evolution.

3. Methodology or approach

Using a collaborative approach, the inquiry group, once formed, will co-determine the exact details of the group's functioning and format. However, below are some broad,

initial expectations and assumptions about the group based on descriptions and suggestions within the scientific literature on these types of groups.

      a.   Group structure

As mentioned in Sections One and Two, this group will consist of six to eight women of color ages 30 and over. Once the specific functioning and format is determined by the group, participants will be expected to attend virtual meetings via an online conferencing platform. While the exact group functioning and activities will be determined by the group, meetings will likely occur on a regular, pre-determined schedule and duration. Meetings will likely be two to four hours long (to be determined by the group and dependent on activities and frequency of meetings) and consist of individual sharing and discussion, contemplative or reflection activities, and any other activity deemed necessary and related to the group purpose.

      b.   Data gathering

Group meetings will be audio recorded and transcribed by a transcriptionist for later analysis by the primary researcher, with input from the group as necessary and appropriate. Participants may be asked to keep journals of their experience and share entries with the researcher as part of data collection.

The researcher will also keep a journal about the group's experience and of her own personal reflections as part of the study documentation and analysis.

Additionally, group members will take a developmental assessment at the beginning of the group to assess their developmental stage. Members' results will be shared with the researchers, but not other group members unless they want to share them. This assessment will be used as part of the study analysis.

Finally, individual group members may be asked to participate in individual interviews or discussions with the primary researcher to discuss their experiences within and outside of the group; however, beyond an initial interview, this will be decided at a later time once the group is formed. Any interviews will be audio recorded and transcribed as part of data collection and analysis.

See Section Six about confidentiality issues.

   4.   Timetable for the group

The exact timetable for the group will be determined by the group; however, it is expected that the group will function for 10-12 months, starting in October or November 2013.

   5.   Agreed upon needs, roles, and expectations

While specific group roles and needs will be co-determined by the group once formed and functioning, the following basic, minimum expectations currently exist for:

Primary Researcher
- Will initiate and convene the group
- Will provide online conferencing software, as applicable
- Will facilitate (either herself or through outside experts/resources) any interventions or activities decided on by the group (see Section Seven)
- Will audio record and facilitate transcription of meetings and any individual interviews/discussions between the researcher and other participants
- Will write-up initial findings for the group/study
- Will keep confidential and secure group meetings and data

Participants

- Have time and space to regularly attend and fully participate in agreed upon online group meetings and activities
- Will keep confidential group meetings and discussions
- Will ensure that necessary computer hardware and software is sufficient for participation in the online video conferencing platform, including having access to a computer in a private location, appropriate high-speed internet, and a headset with microphone
- Are open to questioning and sharing thoughts and experiences with other women
- Are willing to document your experience and share this documentation
- Are willing to take (and cover the cost) of a developmental assessment (see Section Seven)
- Are open to the possibility of traveling for one or two in-person meetings/retreats

6. Confidentiality

All information or data shared and collected as part of the group, including meeting and discussion recordings and transcriptions, journal entries, and other artifacts or documents created by the group and its members will be kept confidential and safely secured. Records will remain in the possession of the main researcher, de-identified, and secured on a private password protected computer. Data will be used to complete and write a dissertation for the fulfillment of the requirements of a doctoral program. They may also be used later to publish scholarly manuscripts and in conference presentations. Again, no member of the group will be identified by name without specific notification and permission.

Any other uses of the data and information gathered from this group by the researcher or any other member will require additional permission.

The only exception to this confidentiality agreement is in the case of a participant expressing serious intent to harm herself or another person. In that case, information must be reported to the appropriate authorities.

7. Costs

The costs for participation in the group are minimal. Specifically, each member will take an assessment to assess her current developmental level as part of the research project. The cost of the measurement is approximately $100, which the member is expected to cover.

Additionally, the group may decide to have one or two in-person meetings in a mutually-agreed upon location, if feasible. If that occurs, each member will be expected to cover any travel and lodging costs herself. However, this possibility will be determined by the group collectively and all members must be in agreement with this decision.

Any additional costs for activities or interventions that the group deems necessary must be covered by individual members, if applicable.

Your signature below indicates that you have read this entire document and have had all of your questions answered. To voluntarily agree to take part in this study and inquiry group, and indicate that you understand and are in agreement with this memorandum, sign on the line below.

_____   _____   _____

Name of Researcher   Signature   Date

_____   _____   _____

Name of Participant   Signature   Date

APPENDIX D

PERSONAL 360 ASSESSMENT

Hello Family and Friends!

I am currently participating in a study group where we support each other on paths of self-discovery and personal development, and that hopefully will allow me to be my best in all areas of my life. One way that we thought would help us personally assess where we are is to individually solicit the help from those we love and respect.

I have chosen different people who have known me in various contexts, during different times in my life, and for various lengths of time. More importantly, I chose YOU because I value your opinion and believe that you will be thoughtful and honest with me. I also believe that you support what is best for me and my life.

So, please take time to respond to the following five questions. It should only take you about 15-20 minutes. Please be honest and don't worry about offending me; this is all in the spirit of helpful feedback. I cannot change what I cannot see or am unaware of. I will use your and others' responses as tools for growth and encouragement.

Your responses will be anonymous unless you choose to enter your name at the end of the questions. You don't need to enter your name unless you want to or if think it would be helpful for me to attach your comments to you. Your responses will be collected along with other responses and then provided to me as a summary. As such, you will be prompted to enter my name at the beginning of the survey so that it is clear which responses belong to me.

I would appreciate it if you could complete the assessment by **Thursday, July 24th**. Please don't hesitate to speak with me about any questions or concerns that you may have related to this.

Thanks in advance! Your feedback is very important to me and will contribute to my ongoing growth and development!

Name of person for whom you are providing feedback_____

1) What is the one thing that you would never want to see changed about me and why?

2) What is the one thing that you would change about me and why?

3) What do you think are my greatest assets or traits?

4) What do you think hinders me from being the best I can be?

5) What additional comments or suggestions do you have for me about myself, my life, or anything else that would help me grow and move forward with living my best life?

Optional: Your Name_____

Survey link: https://www.surveymonkey.com/s/NRQW5GJ

APPENDIX E

POST-MEETING REFLECTION PROMPTS

1) What was your experience during the meeting (describe any thoughts, ideas, feelings that emerged in relation to the discussion, other group members, etc.)?

2) What emotional charges (if any) or bright spots (if any) emerged for you during the meeting?

3) What new insights about yourself (including your being, seeing, and knowing; and developmental edges or blind spots), your experience, and/or the group did you have during and/or following the meeting?

4) Anything else you would like to share about the group and/or your experience of it and within it (esp. related to process issues like technology, group interaction, structure, facilitation)?

APPENDIX F

POST-GROUP REFLEXIVE, PROVACATIVE INTERVIEW QUESTIONS

The purpose of these questions and conversation is to help me better understand your developmental arc over the course of the past year, including how the group has contributed to this, where you are around the challenges that initially brought you to this research/group and how these may have shifted over the past year.

1. In reflecting on the past year and your participation in the group, how would you describe your developmental arc? Mention Action Logics.
2. How are you different now from when you joined the group? What has shifted in your awareness, knowing or behavior? What do you know or see now that you didn't know or see then?
3. How would you describe the group's dynamic and how it has evolved/shifted over time? How has the group (including other members) changed and developed over time?

Mention initial concern raised at the start of group:

4. Where are you now around your understanding and experience of that concern?
5. How has the group supported you in managing/dealing with these (or other/past) challenges both a) practically/tangibly and b) developmentally, through any increased capacity (and/or changes in your thinking) you may have acquired?
6. How has your experience of and thinking about the group changed over time, from when it first started to now? How do you think the group can help you with your current concerns and challenges now? And with your own personal/professional development?

APPENDIX G

ANNOTATED MEETING AGENDA, 1/25/14

⊙ **Note** – type in chat box: Welcome co-inquirers! Please make your user name your first name and the city and state (or country) where you are currently located (e.g. Shakiyla – Decatur, Georgia). **Note:** This meeting (like all others) will be recorded. The red dot on the screen will indicate when the meeting is being recorded. Have PP slide up on the shared portion.

⊙ Begin recording and welcome everyone once they arrive. Show snacks. *"Good morning everyone, from Georgia to Mozambique. Thank you all for showing up, both literally and figuratively. As most of you know, I am Shakiyla – the convener of the group, which I have started calling the evolution of consciousness group, but we can revisit that. I'm here in Georgia and it's unusually cold right now. Like any good meeting host, I brought snacks. Feel free to help yourself. I would like us to rotate bringing snacks each time we meet. So we are finally here and officially convened! Before we go over the agenda and do introductions, I have just a few quick tips for working with this virtual platform:*

- *When you are not talking, please keep your mic on mute to limit background noise and reverberation. Just remember to unmute before you speak.*
- *Speaking of, there is a handraising function in Adobe, which we may decide to use for speaking and to avoid talking over each other. For now, let's see how we do with just speaking up as normal. With that, though, you should allow a little pause to make sure the other person is done – as sometimes there is a slight delay. We can revisit this later if necessary.*
- *Also, if we are having issues with freezing or delays, we may attend to the bandwidth by pausing the video, which allows your picture to stay frozen on the screen while the audio is in tact, to free up more bandwidth. You can do this by hovering over your video and the options should come up for that. I think we should mainly do this if one person will be speaking for a while and the video is breaking up.*
- *If someone drops, please log back on and re-join us. Depending on where we are, we may wait until you get back on or not.*
- *Also, feel free to make use of the chat function to send messages to me during the meeting if necessary, though, please speak up as well.*

⊙ Welcome and Introductions
- *"Let's introduce ourselves first before we begin. This slide shows what I would like for us to include. As I said earlier, my name is Shakiyla."* Add other details. *"Who would like to go next?"*

- ⊙ Agenda
    - ■ Go over the purpose of the meeting and the agenda – **pull up slide**
    - ■ *"So, the intention is to convene for up to two hours today as part one of a two-part introduction to the project and our work together. The purpose of this meeting is for us to formally meet each other, officially call us to order and introduce you all to our work together, and discuss and decide on some of the more practical/operational aspects of the study. This is the agenda. As you may notice, it is broken up into the three main functions/activities. We've already introduced ourselves, so I'll go into a little bit about what we're doing here before we move onto logistics. Does anyone have any questions or thoughts about this before I move on?"*

- ⊙ Group Purpose and Requested Commitments
    - ■ Describe how the idea for the group came – from a u-journaling process and the realization that I had been in this space of transformation for a while and was struggling with it despite my best efforts (therapy, meditation, yoga, etc.)…it had been occupying my life and practices…and a few of my close friends had also been having the same experience. The experience of somehow being in over our heads in terms or feeling a little stuck in terms of moving to a new way of knowing, being, and acting in the world. Was introduced to these participatory research methods and Robert Kegan and others' theories about adult stage of consciousness and development. And thought it would be amazing to actually study, in community, *And so I became very interested in how it is that we intentionally facilitate our own evolution. And the cool thing is that I was able to identify 6 other women – you all – who also share a similar experience and concern. And I have had extensive conversations with each of you individually about this and your experience. And know that while the scenery is different, our paths are very similar. So that is what this group is about…us partnering together at this point in our journeys where we find ourselves – in different manifestations – sensing that there is a blind spot in our knowing and being, a place that we are not quite able to push ourselves over…a block/place/experience where we meet the limits of our own knowing, being, and doing…and this group is about exploring that and seeing if our explorations open up something…[pause – see if there are any comments]*
    - ■ **Big Ideas and Definition**
        - ⊙ *So, please indulge me for a minute as I attend to a little definitional issue here – and the next introductory meeting part 2 will get ore into the nitty gritty of the overall methods we will be using – I am defining consciousness as "the scope and quality of our awareness, our way of making meaning of our experience, and our complexity of thinking, feeling, and social-relating….how we know and understand ourselves, others, and the world…*
    - ■ **Focus of Inquiry**
        - ⊙ *So going back to the purpose…essentially what we are up to here is intentionally looking at how we evolve our own and each other's consciousness and looking at the impact that this evolution has on our*

lives and our ability to more effectively navigate the different aspects of our lives –professionally, relationally, spiritually, whatever(it might be different for each of us)…but we will be inquiring deeply into our own and each other's scope and quality of awareness and complexity of thinking, feeling, and relating. But we won't be just thinking and talking heads, we will be taking action and experimenting…So, specifically, As part of our work together, we will really exploring this topic of our own evolution, testing out tools and actions that may help facilitate this both within the group and outside of it, and as meticulously as possible capturing and recording what we find. And we'll talk more about some these details in a moment.

- ◉ *What are your reactions to what I have said so far? Questions or comments?*

- ▪ **Constraints and Freedoms – commitments**
  - ◉ So, part of our work here is to work with different tools or constraints, if you will, that will allow us the freedom and confidence to take this deep dive.

- ▪ **Roles**
  - ◉ *So, this is already in your consent form and MOU, but I wanted to say something about this formally again, but it will inform how we work together. We are co-inquiring into our own and each other's consciousness together…while I am the convener and will take on more of a facilitative role, you all are as involved in this inquiry as I am…this is deeply personal and close for all of us…you are co-researchers shaping and paying attention to what we are up to and what we capture as much as I am…that said, there are some specific clarifications that I want to mention*
    - ◉ My role and commitments:
      - ◉ *To take greater responsibility for the group initially…around convening us, attending to any interventions we want to try, and really attending to the larger purpose of what we are doing here – including paying attention to formally capturing what's happening with us all individually and as a group. Though, my expectation is that some of this will shift as we progress.*
    - ◉ Their roles and commitments
      - ◉ *However, because we are co-inquiring together, there are some commitments that will be required of you in order for this to be successful – both for you and the group, and for the larger inquiry that we are engaged in. They are not many, but they are important and they require a lot from you:*
        - ◉ *First, that you are committed to attending and being engaged during all of our virtual sessions…we'll discuss this in more detail later…*

- ◉ *That you are committed participating in a couple of online tools that we will use to continue our work and capture our experience in between these virtual meetings – specifically, we will be using an online, private journal space to capture our individual thoughts, feeling, and ideas and I will create an online closed discussion group for us to communicate and share with each other.*
- ◉ *A commitment to open communication and generous sharing of your experiences as it relates to this phenomenon*
- ◉ *So, basically I'm asking you to be fully engaged and "on" from the moment we start the group until we end and that we are paying attention to the evolution of our consciousness both within and outside of the group…that is the commitment. But it's also the gift of the group, as well…it will provide a container and placeholder for this deep and very important work.*

- ◉ "Does anyone have any other comments or thoughts before we move into the more logistics phase? Any concerns?"

- ◉ Operating Principles and Norms
    - ▪ Ask people to refer to these…*"I would like us to generate a list for us to use with these as a springboard…these are just suggestions…as you come up with suggestions, as yourself, "what norms do we need to establish that will offer a safe and productive container for our work together?*

- ◉ Logistics and Next Steps
    - ▪ Look at suggested/potential meeting structure – see PP. Thoughts/comments?
    - ▪ Get out calendars to schedule meetings
    - ▪ Go over plan for next meeting:
        - ◉ Add…second part of introduction
    - ▪ My next steps: will be sending some readings and assignment, setting up the virtual diary space and including an initial prompt, and setting up the group discussion space.
        - ◉ For them: take the assessment. Less than an hour and need to be done before we meet again. Part of our next meeting will be exploring where we are…

- ◉ Closing
    - ▪ Quote…express appreciation for each of them. My excitement about the group and this work.