MAKING MAGIC

FACILITATING COLLABORATIVE PROCESSES

by

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ABSTRACT

The purpose of this study was to examine the meaning and value of 'making magic,' facilitating collaborative processes. In this study the term 'making magic' is a metaphor for the peak experiences that happen when facilitating collaborative processes with groups (two or more people) in workplace, community, and/or classroom settings. Four other educational/organizational consultants joined me in this inquiry that was itself a collaborative process that I facilitated in three stages: interviews; collaborative conversation; and data analysis.

Two key areas of literature, appreciative inquiry and transformative education, inform and are informed by this study. I used appreciative inquiry as a research methodology and the models, theories and applications of appreciative inquiry inform our practices of 'making magic.' The transformative education literature added a critical lens that is lacking in appreciative inquiry, the notions of the impact of social structural differences on people's ability to appreciate and be appreciated.

The primary findings of this inquiry are the notions of critical appreciative processes, and 'making magic' through being present, vulnerable and courageous. Critical appreciative processes combine the appreciative and the critical. These processes could enhance the possibility of magic, the transformation that happens when groups of people collaborate effectively by being interconnected and authentic, present, with each other. The group

transforms to be more than the individuals put together and/or the group process aggrandizes the learning. Critical appreciative processes could create sacred spaces, holistic spaces that take into consideration the spirit and emotions as well as the intellect and body. Facilitators intentionally create these spaces for the possibility of magic through a variety of strategies and by being present, vulnerable and courageous themselves, being who they are, as they facilitate.

The collaborative group in this inquiry moved beyond the initial peak experiences of their work to critically examine the challenges of 'making magic.' It is hard work. But the value of the work is the possibility of constructive change in the worlds within which we facilitate. It is of value to us as well, because we continue to learn and grow through our 'magic making' work.

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DEDICATION

To Joan McArthur-Blair, my partner in the magic of life.

ACKNOWLEDGEMENTS

CHAPTER ONE: MAGICAL FABRIC

Magical Snippets

Birth of a Magic Wand

I was falling in love when the magic wand appeared in my life. I was 45 years old, married for 20 years to the same man, mother of a precocious 14-year old daughter with turquoise and orange hair, Associate Dean in a large urban community college, and an Instructional Skills Workshop facilitator/trainer. I had been infatuated many times in my life but this time was different. I had been pretending to be happy in my marriage, being the perfect woman, wife, mother, daughter for many years. I was ready for magic to happen. I was filled with joy, not knowing what lay ahead, having faith that it would be something wonderful, letting the spirit guide me, letting go of control, trusting…

…The magic wand story I tell my adult education classes…

Several years ago I was at a facilitator retreat in Naramata, a beautiful village nestled on the side of Okanagan Lake amongst the vineyards and wineries.

Every year at this retreat, after four days of workshops, we have a celebration on our last night together. The small groups (of course there are small groups, we are adult educators after all) each put together a skit that symbolizes something about their experience and what they have learned at the retreat. More importantly, the skits are created to entertain and have fun. The sillier the skits, the better they are. The objective (of course there has to be an objective – a performance objective) is to laugh and celebrate our work of the previous four days. We use a collaborative model for this work where participants can bring in new ideas, try them out and get feedback; or participate with whatever amount of energy each person brings. We come to this place to learn together and share ideas. We also come to have fun, rest, re-energize.

This particular year, our small group decided that since one of our members had brought the World Wide Web workshop to the institute, we would do a skit called "The Wizard of the Web," based on the characters of "The Wizard of Oz:" Dorothy, Scarecrow, Tin Man, Lion, Wizard, and the Good Witch of the North. Guess who got to be the witch.

So as Jeanie, Good Witch of the North, I needed a costume. I borrowed a white nightie from a roommate and made a paper tiara, but something was missing. I remember Glynda in the movie waving a wand; where was I to get a wand? Beth, one of my group mates, came to my rescue by lending me her brand new multi-coloured feather duster, purchased on her way to Naramata. Do they not have such things in Grand Prairie, northern Alberta where she is from?

The skit was hysterically funny. We enjoyed ourselves and so did everyone else. I had lots of fun swirling my magic feather duster around. It worked! - creating laughter and enchantment as it wafted through the air. The next day when I was about to drive off on my journey home, Beth handed me the duster and reverently said, "This can no longer be a feather duster; it is your magic wand." And so, my magic wand was born.

I begin this chapter with one of my own snippets[1] to locate this inquiry as narrative in

nature, to locate my topic of 'making magic, facilitating collaborative processes'[2] in its

origins of waving a magic wand in my facilitating practice, and to illustrate the

interconnection of my personal life with my professional life. My magic facilitator wand

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[1] The term 'snippet' refers to short stories or anecdotes of the co-researchers' lived experiences, short stories and/or quotes from the research process, and/or quotes from the literature. I explain this term further, later in the thesis.
[2] Throughout the thesis I shorten the full topic, 'making magic, facilitating collaborative processes' to 'making magic' and explain this terminology in the Inquiry Purpose and Significance section of this chapter.

has grown over the years to be a multi-coloured feather duster covered in trinkets of various sorts given to me by participants in my workshops and courses. It has sound, colour, texture and many stories. It symbolizes the playfulness I bring to the serious business of facilitating groups. It is a tool for me to let some of my inner-self show through as well as the joy and the serious responsibility I bring to facilitating group processes.

To further locate the inquiry in narrative and to glimpse at 'making magic,' I include the following five snippets. The participants/co-researchers[3] of this inquiry, Jeanie, Sandy, Liz, Leslie, and Glynis[4], told these stories of peak experiences facilitating collaborative processes, 'making magic,' in the inquiry interviews. I return to these snippets in Chapter Four: Being Present.

Creating Powerful Connections

Glynis: I was facilitating at a conference put on by a group of people from various not-for-profit organizations in our community who wanted to find ways to collaborate across the different sectors – arts and culture, social services, sports, and others. I used appreciative processes with them to explore the theme, "creating powerful connections." On the first evening of the conference they interviewed one another and worked in small groups to come up with provocative propositions that were amazing and inspiring. The organizers were threading the arts through the entire process. I would have liked the participants to add images to their propositions, but there wasn't enough time for this. During the planning phase, I talked about my disappointment with one of the organizers who offered to find a teacher in town who agreed to have her grade 6/7 class decorate the propositions that we created. I e-mailed the provocative propositions to the teacher

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[3] The terms participants/co-researchers refer to me as the primary participant/researcher and the four other consultants who worked with me to examine our practices of 'making magic.' In Chapter Two I explain the evolution from participants to co-researchers as the process became more collaborative.
[4] Each of the consultants gave permission for the use of their real first names in the inquiry.

that night at midnight and she wrote them on flip chart paper. Over the course of the next morning her students decorated them. I came in early so I could talk to and watch the children because I thought it was important to bring their energy back into the discussion at the conference. The flip charts were gorgeous. That afternoon, we papered the walls of the conference room with them and worked with them further in the second part of our process. People were really engaged, in part because of these unexpected artistic offerings. We were all excited that we had been able to bring the voices of the children into an adult conference in an unusual way. People were inspired!

Tears, hugs and CEOs

Sandy: I facilitated a Strategic Planning process for the organization I work with in Texas. We did something that was a key part of the process. We held a funeral. This is something I've done fairly rarely and only in exceptional circumstances. In this case it worked. I set up the room like a darkened funeral room lit by candles. When everyone was in the room and seated around a rectangular table with a glass full of water or something alcoholic, their choice, we went around and made toasts. To make it safe, as in every round robin that I conduct, you can always choose to pass. Everyone that chose to participate made a toast to the old CEO and the old organization and then to the incoming CEO and the new organization. Some people kind of sloughed it off but most of the 20 plus people that we had in the room took it seriously. There were tears and there were hugs. The incoming chairman of the board who'd sometimes had difficult relationships with the outgoing chairman/CEO made a truly heartfelt statement after the thing was over. He was almost in tears talking about what he'd learned from him and how meaningful the relationship had been. In the end, it was really very dramatic and psychologically things changed in that room that night. The next morning, it was clear that the new CEO was now 'the' CEO in everyone's mind and heart.

A Complete Love Affair

Liz: I was teaching my interviewing skills class at UBC that I teach every Fall term and there was something about that class where it was a complete love affair. It's hard to describe what that means. It's almost like falling in love, the class with me and me with the class and I don't mean that in a sexualized way at all so what happened during the course was … they learned everything and more that I was trying to teach them. At the end they were the most incredible counsellors that I have ever taught. There was always laughter and there was always learning and there was application of learning and challenging. What I did was I challenged them. They had to do role-plays with video camera and get feedback. Within the first class they were prepared to take risks and they created a safe environment for themselves. I created, we created a safe environment where they felt they could take risks very quickly. They weren't afraid to give each other feedback that was constructive. It was about their behaviour, their performance and it was not competitive. They shared with each other their own sense of self, who they were, what they wanted to become and in doing so they became it.

Vulgarity is Ok

Leslie: I was facilitating the process of developing customer service standards for the corporation using focus groups of frontline people. Their managers who participated in the process sat in silence at a table with duct tape on it to symbolize their role of just listening, no talking. I was developing agreements with one of the focus groups, a group of industrial men, when one participant suggested, "vulgarity is ok." I was taken aback at first and said, "do you mean we won't use any swearing in the room?" And he said, "no, that we can swear in the room." There were lots of nods of agreement around the room. I was surprised; usually agreements are sort of gentle, thoughtful, nurturing respectful things. So I asked them "what does that mean?" They said, "customers are always swearing so if we are telling a story we need to be able to swear to make the story real." And I thought, "what a broken organization and this is what they need," and said, "fuck." They didn't bat an eye so I built on what they were doing and said, "no shit?" and they said, "exactly." They needed to test me and to test that the silent managers at the back table were okay with this. I was facilitating two processes simultaneously, keeping my eye on the gasping managers as well as the nodding front line workers. We all passed the test and moved on to develop the standards in a very structured way.

Sharing My Inner Life

Jeanie: My mom was dying when I started teaching my first course at UBC. After struggling with whether I should teach or stay with my mom, I decided to teach the class. I funnelled all my energy in order to do the things I do in a first class to establish a climate for magic – getting to know each other, establishing our guidelines for working together, hearing their expectations, clarifying course requirements and structure. I was high energy and lots of fun. People went away eager to return. I said nothing about my mom. The second class was a week later and meanwhile my mom had died. I felt like a truck had run over me and I couldn't imagine how I would teach this second class. There was no reserve in me. I was in tears driving out to the campus. Within moments of the beginning of class I knew that I had to share what was happening in my personal life to be authentic in facilitating this class. So I told them about my mom dying and how that might affect how I would be in class, connecting my story to the content of this class on teaching perspectives. Sharing my inner, private self was very powerful. The students were moved and we were able to continue on. It was a magical class all the way through to the end of the term.

Having located this inquiry in the narratives, I want to move on to lay out the fabric for

the magical quilt of this inquiry by explaining the purpose and significance of this

research; introducing myself further and providing background as a 'magic maker' in my

practice of educational leadership; and providing an overview of the thesis.

Inquiry Purpose and Significance

I think it's a gift to be able to reflect on one's practice. For me it's a vertical and a horizontal gift. The horizontal gift is the circle both online and here, hearing and experiencing and the vertical is digging down inside myself and being able to talk on a very, very deep level. (Liz, collaborative face-to-face conversation)

The purpose of this inquiry was to examine my 'making magic' work, and that of other educational/organizational consultants, in order to gain a better understanding of our work. The main questions we explored were:

1. What is the meaning of 'making magic,' facilitating collaborative processes?

2. What is the value of 'making magic,' facilitating collaborative processes?

For this inquiry educational/organizational consultant is defined as a sole proprietor of a consulting practice that includes facilitating group processes and some formal teaching.

For the purposes of this study, 'making magic' is a metaphor for facilitating collaborative processes with groups (two or more people) in workplace, community, and/or classroom settings. In particular, 'making magic' refers to the peak experiences that happen when facilitating collaborative processes. The consultants in this inquiry illustrate their notions of 'making magic' with stories from teaching, team building, strategic planning, organizational and group development, and/or 'championing creativity.'[5]

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[5] The term 'championing creativity' comes from Glynis whose practice includes developing people's creative abilities in many ways.

This study contributes to the body of knowledge on collaboration as a key process for faculty development, adult education, and team building or group development. All of the consultants, through their participation and co-researcher roles in this study, have contributed to the theory of facilitating collaborative processes.

This research is also significant for me, as it has allowed me to critically explore the collaborative processes I currently use as a teacher/facilitator/group developer, and to build and add on to these processes. For the participants/co-researchers in this study, their participation was also a learning and research opportunity that contributed to their professional development, as the above quote from Liz illustrates. As we ended the last part of our collaborative conversation, the face-to-face meeting, we talked about how rare it is, as consultants, to have these kinds of opportunities to reflect deeply about our practices, in dialogue with other consultants. It is especially rare to dig into the unspoken soul of our practices, who we are as we do what we do, and the challenges we face in striving to 'make magic.

My Introduction and Background

Magic is "an extraordinary power or influence seemingly from a supernatural source, something that seems to cast a spell: enchantment" (Webster's Dictionary, 1973, p.690).

An enchanted world is one that speaks to the soul, to the mysterious depths of the heart and imagination where we find value, love, and union with the world around us (Moore, 1996, p. x).

'Making magic' is located in my practice of educational leadership as a facilitator of group processes. I have been interested in educational leadership for many years. My M.A. research and thesis, *Power and Leadership: A Perspective from College Women*, (Cockell, 1993) challenged the traditional hierarchical notion of leadership based on power over others as being the only way to lead. The women interviewed talked about leading through power with others, by caring and connection. I built my constructed model of leadership[6] (Cockell, 1993) out of theories of women's moral development (Gilligan, 1982) and women's epistemological development (Belenky et al., 1986). Since then I have continued to use the constructed leadership model in my practice.

I entered the Doctorate in Educational Leadership and Policy (Ed.D.) program in order to further my exploration of leadership, still fascinated by the challenges of leading with care and connection in systems which seem to value power over rather than power with. The Ed.D. program, with its emphasis on critical reflection of practice, has provided opportunities for me to be a practitioner researcher, inquiring into my leadership practice through the tools of narrative inquiry and autobiography. I will say more about these later in this thesis.

I believe leadership is the capacity to make things happen (realize a vision) by influencing others, ideally in collaboration with them by sharing the power to make the visions realities. Through my practice I strive to be a constructed leader (Cockell, 1993)

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[6] A constructed leadership style is based on balancing the ethic of connection/caring (connected leadership) with the ethic of justice/rights (separate leadership). Constructed leaders use power in context, recognizing when to use power over (separate) and when to use power with (connected).

who balances power over and power with. Balancing power over and power with requires a leader who sometimes makes things happen using the power vested in positional authority and sometimes through collaboration.

I am an educational and organizational consultant who runs a private consulting practice grounded in adult education. I provide educational services including: teaching; designing and facilitating collaborative group processes; designing and delivering workshops and courses; evaluating programs and projects; doing survey research projects; and, currently, acting as the Dean, two days a week, at the Institute of Indigenous Government. I provide educational leadership by facilitating learning for adults in a variety of settings. I educate others through my educational services to them and I educate myself by constantly learning in response to my continually evolving and changing consulting practice.

I am passionate about facilitating groups and creating spaces that allow collaborative processes to happen. 'Making magic' is the metaphor I use for facilitating collaborative processes, in particular, the peak experiences where enchantment happens. I use the term collaborative to describe a process where individuals work together towards a common goal(s) through dialogue with each other. I use the term dialogue to mean open, respectful, and honest communications through which participants create common meaning, recognizing that as individuals we bring our own biases and frames of reference to the dialogue. Sharing personal perspectives creates the human connections so necessary for enchantment to happen in the collaborative process. Through this research I

have gained a better understanding of the meaning and value of 'making magic,' facilitating collaborative processes, and it is this understanding that I present in this thesis through the stories and critical reflection on 'magic making' experiences.

My practice of educational leadership through 'making magic' is based on my practice of being a human being. Like Palmer (1998), I believe we teach and lead based on who we are. Who I am is based in what I am: a mother, daughter, sister, lover, partner, friend, colleague, learner and middle-aged white woman. Who I am is also based on my passions in life. I love to laugh, sing, dance and wave my 'magic wand.' Who I am is based on my values and beliefs. I am a feminist who believes in equity for all people, recognizing that the world is not equitable for all people. Some people have more power due to unearned privileges (McIntosh, 1988; Young, 1990). I have a great deal of privilege and believe that with privilege comes responsibility. I take responsibility for making the world within my sphere of influence better, doing 'good,' by building community. In a world filled with wars and hatred, this is an ambitious responsibility but one that drives the work that I do. If I can get a few people to work together cooperatively (Johnson, Johnson & Smith, 1991; Kagan, 1994) and appreciatively (Bushe, 2000a, 2000b, 2001; Cooperrider & Srivastva, 1987; Cooperrider, 1999; Cooperrider & Whitney, 2000; Cooperrider, Sorensen, Whitney & Yaeger, 2000; Hammond, 1998; Ludema, Whitney, Mohr, Griffen, 2003; Mohr & Watkins, 2002; Srivastva & Cooperrider, 1999; Watkins & Mohr, 2001;Whitney & Trosten-Bloom, 2003; Yballe & O'Connor, 2000), my hope is they will take these skills out in a ripple effect to their worlds.

My background includes teaching math, training trainers and facilitators, teaching adult education, writing curriculum and designing courses and workshops. I have presented short workshops and made presentations at a variety of conferences and professional development events in the post-secondary system. These include such topics as leadership, conflict resolution, diversity, working with groups, and team building. As well as teaching and presenting workshops I have facilitated team building with workplace teams-in-trouble, mostly in the post-secondary system.

Much of my own learning around creating collaborative groups came from my administrative roles in workplace teams, often as the team leader. In the past, my formal leadership roles provided me with many group development challenges. I approached these formal leadership roles as an adult educator. I saw myself as facilitating learning whether I was mentoring a new department head, moving projects along (getting outcomes), or working with competing groups to work collaboratively together. Now as a full time independent consultant, I am both a formal leader of my own business as well as a teacher, dean, facilitator, and team-builder.

The thread throughout all of these different activities is my passion for working with people as a facilitator to provide opportunities that enhance their ability to learn, to work interdependently with others to achieve group outcomes or tasks through collaborative processes, and to have fun doing so. The collaborative process itself is as important as getting the tasks accomplished. This process involves group members working and learning together through sharing personal as well as professional stories (sharing their

inner and outer selves). I love to watch synergy happen as a result of this collaboration, when power is shared. We live in a world where power over predominates, resulting in people being hurt, isolated, and disempowered. In all my work I am committed to doing what I can to contribute to a better world where people support one another, connect to one another and, as a result, empower one another. These contributions in the microcosm of my classroom and workplace team building settings eventually impact outwards to participants' classrooms and workplace team settings, evidenced by participant feedback.

The greatest passion I have in my work is teaching people who are or want to become educators. I use the term educators very broadly. It includes teachers and administrators in the school system, instructors/professors and administrators in the post-secondary system (public and private), and trainers and managers in the public, private and non-profit sectors. I like teaching people who are interested in the teaching/learning process and who want to become better educators themselves. Like Duckworth (1986), I love teaching people who are interested in how people learn and, therefore, "the dialogue is deeply felt" (p. 481). As Duckworth says, in this reciprocal process, "I always learn from them in return" (p. 481).

Thesis Overview

To capture the magic of this inquiry I use a quilting metaphor that emerged as I collected data, wrote, and analyzed the data. Quilting captures the interconnectedness involved in 'making magic.' Throughout this thesis I use the metaphor of sewing together a quilt of

colourful snippets, themes, and notions from the literature. The thesis as a whole is the magical quilt made up of the chapters: Magical Fabric, Magical Inquiry, Magical Notions, Being Present, Vulnerability and Courage, and Ongoing Magic.

Chapter One: Magical Fabric provides the basic fabric necessary to start quilting, some magical snippets, the purpose and significance of this inquiry, my introduction and background as a 'magic maker' in my practice of educational leadership, and the overview of the thesis.

Chapter Two: Magical Inquiry describes the methods I used in this inquiry. My intention in doing this inquiry was to explore my practice of 'making magic' and that of others by interviewing and facilitating a collaborative dialogue with other 'magic making' practitioners. The outcome of the inquiry process was magical, therefore, as I describe the methods I used, I also reflect on key places that contributed to the magic within the inquiry process itself.

Chapter Three: Magical Notions presents some notions from the literature that act as the threads with which to quilt the snippets, and other types of notions that add colour and magic to the quilt. Some of this literature inspires and challenges me to be reflexive, to critically reflect on my practice and who I am in that practice. Other literature provides me with useful tools in my practice of facilitating collaborative processes. Throughout the chapter I weave in my own stories and stories from the inquiry in relation to notions

from the literature. The two main areas of literature are appreciative inquiry and transformative education.

Chapter Four: Being Present presents findings of the inquiry by sewing together some of the co-researchers' snippets that arose in the inquiry process, weaving in literature where appropriate. I analyze each of the snippets for themes that relate to the meaning and value of 'making magic.' The main theme that holds together the snippets is being present, being who we are as we facilitate. Throughout the snippets and analyses there are also examples of how we do it, strategies for 'making magic.'

Chapter Five: Vulnerability and Courage presents more snippets and themes, moving into the riskier areas of discussion that arose in the collaborative conversation, areas that explore some of the challenges of striving for magic.

Chapter Six: Ongoing Magic presents a summary of findings, implications of the inquiry for facilitator development and research, and the impact of the study on my ongoing practice as a 'magic maker.'

CHAPTER TWO: MAGICAL INQUIRY

The magical group sat around the dining room table eager to connect, excited to meet face-to-face finally. All nibbled hungrily at the food, except for me. I was too focused on the process – it had to be magical! I told them this evening was a celebration of the magic we had been making together in our collaborative e-mail discussion. I suggested the circle structure for the evening but that whatever emerged would be ok…and it was…not a circle but a web, voices weaving back and forth, connecting, laughing, enjoying silence, feeling the energy, facilitating each other, caring, sharing, risking, being…magic is…(Jeanie, journal)

My intention in doing this research was to explore the practice of 'making magic,' mine and others, by interviewing and facilitating a dialogue with other 'magic making' practitioners. The research process was in itself magical, therefore, as I describe the methods I used, I also reflect on key places that contributed to the magic. The brief story, snippet, above is an example of this reflection. I wrote it from my journal reflections on the March 29, 2004 face-to-face get-together of the co-researchers.

This chapter presents the inquiry in five sections: Mode of Inquiry, Magical Group, Stage One: Interviews, Stage Two: Collaborative Conversation and Stage Three: Quilting the Snippets. Woven throughout this chapter are snippets from the co-researchers, references to the literature that informs our 'magic making,' and analysis of the meaning and value of 'making magic.'

Mode of Inquiry

We are possessed by stories and songs…they take hold of our hearts and minds even as they free them up…we live within them, as well as with them…(Chamberlin, 2003, p. 120).

In this section I describe the inquiry frame, journal writing and the inquiry stages. One of the challenges of representing this research is to capture the iterative nature of the process. One way that I do this is to weave into the description of what happened some of the methodological theory that informed the process.

Inquiry Frame

This inquiry is narrative. "Narrative is an umbrella term for different kinds of storying; it can refer to how research is framed methodologically, how data is analyzed, or how research findings and conclusions are re-presented" (Chapman, 2004, p. 71). In this inquiry I used narrative in all three of these ways. Methodologically, I collected my own and others' stories – the data. One of the ways I analyzed the data was through writing the story of the process of inquiry itself. I re-presented snippets to illustrate the themes and meaning and value of 'making magic.' Throughout, I used narrative to construct knowledge about the meaning of 'making magic' and of myself as a 'magic maker.' Narrative epistemology is based on the notion that humans are story-telling beings. How we construct ourselves is through our stories and we construct social reality with our interactions and storytelling with others (Arvay, 2002). I use narrative as a personal quest (Conle, 2000) for understanding the meaning of 'making magic' and why I am so

passionate about it. It is one of my life's quests to understand this drive of mine to make a positive difference in the world by facilitating others to collaborate with each other.

This inquiry into the meaning of 'making magic' is based on critical reflection of my practice through my stories of facilitating, as Clandinin and Connelly (2000) state, "narrative inquiries are always strongly autobiographical" (p. 121). Narrative plays an important role in my 'making magic' practice. I tell stories to engage my participants and learners and to illustrate more deeply the ideas we are exploring as I facilitate a group. Because narrative is an important part of 'making magic,' it made sense to me to use a narrative inquiry to investigate my practice of 'making magic.' In this thesis I have written short stories, anecdotes (Van Manen, 1990) of my own autobiographical experiences as a facilitator and the experiences of four other facilitators. I call these anecdotes snippets because I have snipped them from various sources: interviews, my journals, e-mails and the face-to-face conversation.

Narrative inquiry is located in qualitative methodology. "Qualitative research is a situated activity that locates the observer in the world. It consists of a set of interpretive, material practices that make the world visible" (Denzin & Lincoln, 2000, p. 3). The world I strive to make visible is the world of facilitating collaborative processes, in particular the peak moments that happen which I call 'making magic.' It is the lived experience aspect of these processes that I inquire into through this research to gain a better understanding of the meaning and value of this work (Van Manen, 1990). This intention has led me to an inquiry process that is phenomenological, which Van Manen describes as exploring what

something is really like. In this thesis I explore what 'making magic' is really like. Stories provide a means to get at phenomena that are difficult to describe. A description falls short of what the essence of the phenomena is, but a story, through the images and metaphors, gets to the heart or essence in a powerful way. This inquiry is a sharing of stories of experience and linking these to theoretical concepts, knowledge and techniques, in order to explore the meaning of 'making magic.' As hooks (1994) says, "sharing personal narratives yet linking that knowledge with academic information really enhances our capacity to know" (p. 148).

My own personal narratives and those of the co-researchers are fundamental to this inquiry. Through the interview process I invited narratives from the participants using appreciative inquiry (Watkins & Mohr, 2001). As well as a research methodology, appreciative inquiry is an organizational development approach and much more. I explore the breadth of appreciative inquiry in Chapter Three: Magical Notions. Unlike traditional deficit-based approaches that focus on problems to be solved, appreciative inquiry focuses on what already exists that is working well in order to grow or appreciate it. Appreciative inquiry is a type of narrative inquiry because the data for the inquiry is collected through storytelling. It is also a type of collaborative inquiry (Bray, Lee, Smith, & Yorks, 2000). "Collaborative inquiry is a process consisting of repeated episodes of reflection and action through which a group of peers strives to answer a question of importance to them" (p. 6). In this inquiry the co-researchers, throughout the six-week collaborative conversation, reflected on and continued to engage in their practices of 'making magic.' Together we discovered themes from the data and explored topics

arising from our ongoing practices. We were socially constructing our understanding of 'making magic.' The theory of social constructionism grounds appreciative inquiry (Bushe, 2000b). Social constructionism is based in a social constructionist epistemology that Arvay (2002) describes this way:

> A social constructionist epistemology acknowledges that one comes to know through reflection on and the deconstruction of discursive practices and discourse within which one lives. Social constructionists emphasize the co-constructed nature of 'reality' and the importance of language practices as a basis for multiple 'reality' claims. (p. 207)

In this inquiry the co-researchers constructed 'magic' together in the process of the inquiry and dug deeply into an understanding of 'magic' in our own facilitating practices. I explain the evolution of this inquiry from researcher and participants to a group of co-researchers in the Magical Group section of this chapter. We co-researchers were creating meaning together through the collaborative e-mail conversation and the collaborative face-to-face conversation.

In this inquiry, I used three of the five core processes of appreciative inquiry (Watkins & Mohr, 2001): choosing a positive topic; inquiring into peak experiences; and locating themes and selecting topics for further inquiry. In Chapter Three: Magical Notions, I describe all of the five core processes and more of the theory, models and applications of appreciative inquiry. In the application of appreciative inquiry to my research, the positive topic is 'making magic,' the peak experiences of facilitating collaborative

processes. In the Stage One interviews I collected peak experience stories and in Stage Two I facilitated the co-researchers' collaborative conversation of themes arising, further stories and topics. I discuss the stages of the inquiry in more detail later in this chapter.

Journal Writing

Before moving to a discussion of the inquiry stages I want to focus on the construction of my personal narrative that is a critical aspect of the inquiry. The autobiographical or personal narrative (Ellis & Bochner, 2000) thread in this inquiry is based on years of journal writing and re-searching/re-reading those journals to pull out themes and stories. Since 1990, I have used journal writing to reflect on my practice. Journal writing helps me to write freely, to learn about myself and to find my own voice. As Greene (1995) says, "learning to write is a matter of learning to shatter the silences, of making meaning, of learning to learn" (p.108). Over the years, I have kept track of my work thoughts and notes about activities in work journals. I have also kept personal journals to help me think through directions and decisions about where to go next in my work and life. In the last decade, I made some major transitions in my life and the process of writing has helped me think through some of the decisions involved. Writing is a powerful way to create one's life as well as to record and reflect on it (Leggo, 1995). In the Ed.D. program, I have kept student journals to reflect on the literature, class discussions and the research process. I returned to these three kinds of journals, work, personal, student, and selected experiences for further investigation in this inquiry, looking for themes related to 'making magic.' There are many places where this metaphor appeared and where I wrote about facilitating collaborative processes. For this inquiry, I have chosen stories of

particular experiences. Although I have been journal writing for many years, there was an important shift that happened as I made these private musings public. For me that shift has been a more critical stance in my reflections on my life and practice.

Inquiry Stages

The inquiry proceeded through three stages before, during and after which I continued my practice of journal writing and re-reading. In later sections of this chapter I describe in detail what happened in each stage. The following is a brief summary of the three stages.

In Stage One I interviewed four educational/organizational consultants and was interviewed myself using the same set of interview questions. These interviews were audiotape-recorded and I transcribed them myself. I analyzed the transcripts for themes and key stories to illustrate the meaning and value of 'making magic.' I wrote a brief synthesis of the themes (Brief Synthesis of Making Magic), selected five snippets of stories (Peak Experiences) and wrote a poem (Magical Facilitators), based on the themes. These three pieces are located in Appendix D.

In Stage Two, I sent these three pieces out to the interviewees and facilitated a collaborative e-mail conversation (focus group) of the interviewees over a six-week period. At the end of this I facilitated a collaborative face-to-face conversation amongst us all and by that time I was calling our magical group co-researchers. In my practice of facilitating, often unexpected outcomes emerge once engaged in the process. In this

inquiry one of the unexpected outcomes was this co-researcher relationship that emerged as we engaged in the collaborative conversation. I will explore this further in the following sections where I describe the methods of the inquiry beginning with the selection of the magical group.

In Stage Three I analyzed the data from the collaborative conversations, both e-mail and face-to-face. Concurrently, I began writing the thesis, letting the analyses emerge as I was doing so, iteratively quilting it all together.

In the rest of this chapter I tell the story of the inquiry from selecting the magical group on through the three stages.

Magical Group

For me this was an opportunity to be with colleagues…that's cool because as consultants we're just out there alone a lot. So this collegiality was rich for me. (*Leslie, collaborative face-to-face conversation*)

The purpose of this inquiry was to examine my 'magic making' work and that of other educational/organizational consultants in order to gain a better understanding of the meaning and value of this work. For this inquiry, I selected four consultants who, like me, facilitate group processes: Glynis, Leslie, Liz, and Sandy. Their group process facilitations include team building, change management, planning, and/or teaching adults in workshops and/or courses. Each of their consulting practices has an educational component with a focus on facilitating group processes. We each share some similarities

in the nature of our work, but we also have a wide range of differences in what we do and with whom we work.

I used purposeful sampling (Morse, J.M. & Richards, L., 2002) based on three specific professional characteristics: educational/organizational consultants who are sole proprietors of their own businesses; facilitators of a variety of group processes; and teachers in post-secondary settings (college, university-college, university, institute). In addition to these professional characteristics, I selected people who I knew through my various networks: the Ed.D. program, the Instructional Skills Workshop (ISW)[7] facilitators' network, and other professional connections. I selected people who I knew might be interested in the topic of 'making magic.' I knew they might be interested from working and learning with them in a variety of contexts. In all cases, I was aware of their interest in facilitating groups. They are all people for whom I have a great deal of respect. I consider them friends as well as colleagues.

I was the only one in the group who knew us all at the beginning of the inquiry. Glynis and Leslie knew each other through the ISW network. Sandy had participated in a workshop that Glynis had co-facilitated. Liz and Leslie's work lives had crossed paths. They had spoken on the phone, but never met in person.

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[7] The Instructional Skills Workshop (ISW) is a three or four day professional development workshop on teaching and learning for instructors and professors in post-secondary institutions in BC, other parts of Canada, the USA, and other countries.

When I began the research I used the term participants for this group, myself included, but moved to the term co-researcher in Stage Two as the process evolved into a much more collaborative and participatory one. Terms such as participants, interviewees and subjects did not do justice to the more complete nature of Glynis', Leslie's, Liz's, and Sandy's involvement in the research. We all participated, were interviewed and were subjects of our investigation. As well, we all probed deeply into our experiences and understandings of our practices as facilitators. In writing this thesis I use the terms appropriate to the Stages, that is, when writing about Stage One I use participants and/or interviewees and in Stage Two I use co-researchers.

In this section I introduce each of the co-researchers using their own words taken from their introductory e-mails in the Stage Two collaborative conversation, indicated by italics and single spacing. I follow the introduction with a brief history of my relationship to each one of them. At the end of this section I describe the process of contacting the participants and establishing consent for participation in the research.

Glynis

After working at an Alberta college for 17 years, I wrapped up my favourite things five years ago and made myself a job. I'm a trainer, facilitator, project coordinator, creativity champion. I work in the areas of creativity and wellness (sometimes spirit is officially named as part of that mix, sometimes it emerges without being named); facilitator, instructor, and trainer development; workplace and personal effectiveness; narrative and teaching; labyrinth facilitation, arts advocacy, and more. I do a lot of work in my community, periodically travel around Alberta and BC. I've had contracts now and then in California, Oregon, and Ontario. I work with the not-for-profit sector, post-secondary educational institutions, business, industry, and government (local and provincial). My favourite place to work is Naramata, BC because it's where I have learned the most about the spiritual journey (mine and others'). (collaborative e-mail conversation)

Glynis and I met in 1993 as co-facilitators, in a four-person team, for the Great Teachers'
Seminar.[8] That same year we were co-participants in the Instructional Skills Workshop
(ISW) Facilitator Institute.[9] Participation in these twice-yearly institutes is an active,
reflective, and renewing process of sharing ideas and resources amongst ISW facilitators.
Glynis was at the 1995 Institute where my magic wand was born (see Chapter One, *Birth
of a Magic Wand*). Over the following years Glynis and I co-facilitated three more Great
Teachers' Seminars and co-participated in many facilitator institutes. In 2002 we co-
planned and co-facilitated with two other facilitators the first offering of the *Labyrinth
and the Art of Leadership* workshop at St. Paul's Church in Vancouver.

Leslie

*My consulting practice includes a 10 year gig as a core instructor in UVIC's Certificate
in Adult and Continuing Education, a 10 year gig as author/owner of my own publishing
company supplying training and curriculum to tourism programs in high schools and
colleges across the country, a 1 year and continuing gig with the corporation initially to
review/evaluate their 85 in house training programs… now focussing using an
appreciative inquiry approach to focus group work with 6 key occupations to create their
own standards of customer service…moving into the curriculum development phase…will
deliver the training to 540 supervisors in the fall. I also do training and conference work
with groups ranging from law librarians, pulp workers and various government
ministries…I work with magic…most classes, interviews, focus groups…increasingly in
what we are calling the fourth domain of learning… (collaborative e-mail conversation)*

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[8] The Great Teachers' Seminar (GTS) is a three-day professional development workshop offered to
instructors and professors in the BC post-secondary system.
[9] ISW Facilitator Institutes are offered every year in BC, in June at Naramata (5 days) and in November on
Bowen Island (2.5 days). Participants are ISW facilitators in post-secondary institutions in BC, Alberta,
California and from various other parts of Canada, the United States and other countries in the world that
use the ISW.

Leslie and I met in 2000 as part of a team of 8 trainers in the ISW Facilitator Development Workshop (FDW).[10] The team of 8 trainers worked together to plan the overall agenda and the daily large group theme sessions, and debriefed as a team at the end of each of the five workshop days. The team broke into pairs to co-train the majority of the event in small groups of 4 or 5 facilitators-in-training. Leslie and I did not co-train a small group but were part of the whole team in May 2000 and again in May 2001. We have also participated in ISW facilitator institutes since then. Leslie introduced me to the Program Coordinator of the Certificate in Adult and Continuing Education (CACE)[11] in 2001. Since then I have developed and taught courses for CACE. Some of these courses have been online and were my first experience with online teaching. Leslie, having taught a few courses online, acted as a sounding board and mentor as I began this type of facilitation.

Liz

I am passionate about my work and about my identity as a social worker…I've worked in child welfare, hospitals and in 1991 formed my own consulting practice. In 1988 I started working part time at UBC's School of Social Work teaching practice courses. I continue to do that and now coordinate the BSW program. My consulting practice and my teaching are part of an interconnected whole: each informs the other in both tangible and intangible ways. Almost all my work is in the educational and/or social services sectors and tends to focus on leadership development, team building, coaching, program evaluation, research, organizational effectiveness, change. I work around the province, and have been particularly moved by experiences in First Nations' communities and in working with women's organizations. I am fascinated by women's ways of leadership… (collaborative e-mail conversation)

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[10] The FDW is a provincial workshop to train people (instructors/professors/teaching assistants) from the BC post-secondary system (colleges, university-colleges, institutes, and universities) to become ISW facilitators at their home institutions.

[11] CACE courses and workshops are delivered through the Division of Continuing Studies, University of Victoria.

Liz and I met over 30 years ago when we were undergraduate students at UBC. Although

not close friends ourselves, we have a mutual long time close friend. Our paths have

crossed through this mutual friend, other connections and intersections of career paths. I

have been in sessions facilitated by Liz, so have experienced her skill as a facilitator first

hand. As well, I know of her reputation as a highly skilled facilitator through colleagues

who have worked with her. Currently we find ourselves in similar places in our careers,

as consultants facilitating groups, teaching and working in ongoing administrative

positions part time in post-secondary education.

Sandy

*I work with values-based organizations all over the continent in order to improve their
relationships, communications, leadership, teamwork, conflict resolution and strategic
plans. I do so through a combination of learning and teaching, games, personal and team
feedback, videos, personality profiles and honest conversations. My practice is highly
varied (all manner of types of organizations and work)…My practice is based on long
term relationships (the five clients I work with most often are ones that I have worked
with for a minimum of seven years and a maximum of sixteen years)…My practice is
values-based because I am values based. I am a curious mix of process orientation and
task focus, having come to believe that task is vital for the sustainability of the
organization and that the way to achieve task is through process. (collaborative e-mail
conversation)*

Sandy and I met in 2001 in our Ed.D. cohort. We have spent many hours working

together as fellow students in the Ed.D. cohort, sharing ideas around the use of circle

process (Baldwin, 1998) and other group development notions. We have actively co-

facilitated, along with other cohort members, our cohort regular reading/research circles

and retreats. In May 2003, Sandy and I attended a six-day writing workshop on Whidby

Island where, along with thirteen other participants, we wrote, talked about the writing

process, read pieces of our writing to the group, and received feedback on these. In

September 2003 at the Ed.D. Institute, we co-presented with another cohort member some pieces from our research. Sandy's research on group trust building is very much related to this inquiry into 'making magic' because group trust is an important part of the collaborative process.

Contact and Consent

Pick me!
(Subject Line of October 2, 2003 e-mail from Glynis)

As is clear in the above introductions, I knew each of the participants I was inviting to be in my study. Our paths crossed from time to time during the development of my research proposal, and I shared with them my plan to investigate my practice of facilitating collaborative processes, and that I would be working with other consultants to do this. None of them was surprised to receive my initial contact letter that I mailed out to them (see Appendix A) on September 28, 2003. By mid-October the participants had all responded enthusiastically, by e-mail or by phone, that they were interested in participating. Their enthusiasm indicated that magic, in this inquiry, was likely to happen. As will be explored later, participant engagement is an important factor in successfully facilitating collaborative processes.

I contacted each of the participants by e-mail or phone to set up interview times. At the beginning of each interview we reviewed and signed the letter of consent (see Appendix A) before beginning the interview. Due to the collaborative nature of co-researching, I

wanted to provide options for anonymity. The first option was to be anonymous

throughout the study except for being known to the other participants in the Stage Two

collaborative e-mail discussion. The e-mail discussion was structured as a group list that

we would all respond to, therefore, we would be seen via our e-mail addresses. It was

important that we be seen in this text-based format, to be present with each other, so that

the conversation could be collaborative. Being present with each other is a key

component of 'making magic.'

The second option I provided was not to be anonymous and to have their data attributed

to them. They could check off: "all my data attributed to me; or only the following of my

data to be attributed to me, Stage One – interview data, Stage Two – responses to initial

analysis, Other – please be specific." Three of the four chose "all my data to be attributed

to me." One of the three qualified this with "first name only." The fourth was

uncomfortable with the term "attributed" and chose to write under the other category: "I

wish to give Jeanie Cockell permission to use my name during all aspects of the project."

The letter of consent included a statement that allowed for change of consent or

withdrawal of participation in the study.

Stage One: Interviews

Magic is…
  ▪ *about transformation*
  ▪ *glue…binding us together...web of connections…getting out of the box*
  ▪ *transformation, connection, engagement*
  ▪ *the chemistry that happens when the group really clicks*
  ▪ *a dynamic sharing of information with a view to learning or to a new outcome*
(Glynis, Sandy, Liz, Jeanie, Leslie, interviews)

In this section I describe Stage One of the inquiry - the development of the interview

questions, the process of the interviews and the analysis of the interviews.

Interview Questions

Tell me a story of one of your peak experiences 'making magic.' (Question 5, Interview Questions, Appendix B)

The exploration of 'making magic' that I had been doing through journal writing,

literature exploration, developing my thesis proposal, developing my comprehensive

exam portfolio and the portfolio guide led me to construct interview questions that would

elicit stories and ideas around the topic of 'making magic.' The open-ended nature of the

questions would allow concepts, ideas, stories to emerge that could go beyond, as well as

resonate with, my own notions of 'making magic.' The structure of the questions was

such that stories and ideas could arise from a variety of places, for example, peak

experience stories could be told in response to describing consulting practices. Answers

to later questions might arise in the earlier ones. I wanted the interviews themselves to be

a process of 'magic making,' clear structure with enough openness to allow me, the

interviewer (facilitator), to go with the flow of the interview, moving to where the interviewee's energy, stories, and enthusiasm were happening.

I organized the open-ended interview questions (Appendix B) into five clusters: background, meaning of facilitating collaborative processes, appreciative inquiry, value of facilitating collaborative processes, and sustaining practice.

The purpose of the background cluster was to begin the interview with something concrete, a description of their consulting practice, and something that would begin to get at the values behind their practice, the how and why they got into consulting.

The purpose of the second cluster was to probe into the meaning of facilitating collaborative processes through asking them for their definitions of collaborative processes and how they do this, and to connect my metaphor of 'making magic' to metaphors they might use for facilitating collaborative processes.

The purpose of the third cluster, which I describe as appreciative inquiry (Watkins & Mohr, 2001) questions, was to get at their peak facilitating experiences, 'making magic.' Appreciative inquiry is a kind of narrative inquiry in which participants tell stories of peak experiences to discover the best of what already exists in order to appreciate it, make it grow. In this inquiry these peak experiences would provide the essential data for us as a group to explore more deeply, in Stage Two: Collaborative Conversation, the meaning and value of 'making magic.' Although the interviewees could tell stories

throughout the interviews, these peak experience stories were intended to be the key to the inquiry into 'making magic.' I based this cluster of questions around the type of questions that I would ask in conducting an appreciative inquiry in my consulting practice. The appreciative inquiry approach to my research weaves my practice into my theory making. It is a useful lens through which to view the collection of my own and others' anecdotes of our practices. In this appreciative inquiry section of the interviews, as well as the peak experience stories, I asked them to tell me what they value most about themselves, their ideal vision of themselves and what they want more of. The purpose of these questions was to invite them to reflect on who they are as facilitators, beyond the techniques, to the values and passions they bring to this work.

The purpose of the fourth cluster of questions was to probe into the value of facilitating collaborative processes and why they choose to do this work in their practices.

The purpose of the fifth and last cluster of questions was to find out what sustains them in their practices and what strategies they use when facing challenging moments while facilitating collaborative processes.

Interviews

…I looked at the word 'facile' as the root of the term facilitating and decided that my job in working with organizations was to make their work easier…for people to work together, to cooperate, to coordinate, to collaborate, to build trust…(Sandy, interview)

From October to December 2003 inclusive, I conducted the four interviews and was interviewed myself. All of us have very busy lives, so it was not easy to find times that would work conveniently for the interviews. Everyone wanted to be interviewed in person rather than over the phone. I conducted the interviews in locations convenient to the interviewees. I interviewed Leslie on October 25, 2003 in my dining room. She lives in Victoria, but was in Vancouver on business and so fit the interview into the business trip. Sandy lives in Vancouver and I interviewed him on November 14, 2003 in the living room of his home. Glynis lives in Alberta and extended a professional development trip to Vancouver in order to be interviewed in person. I interviewed her in my dining room on December 1, 2003. Liz lives in Vancouver and I interviewed her in her living room on December 8, 2003. On December 14, 2003 a fellow student in the Ed.D. program, interviewed me in my living room.

All interviews were audiotape-recorded. I did not take notes in order to be able to be fully present in the interviews myself, to listen well, to respond to their ideas and stories, probing where necessary, encouraging them to say more. The interview questions described in the previous section worked well as an open structure to allow the stories and ideas to emerge.

Each interview invited the participants to reflect on their practice of facilitating collaborative processes. In our practices we often include one-to-one interviews as the initial part of developing a collaborative process. The opportunity to reflect like this and

to be deeply listened to furthered the magic. Being present and contributing in a meaningful way to the collaborative process is key to the process being magical.

Interview Analysis

Magic is this transformation, the alchemy that happens when the people in the group are interconnected and authentic with each other. (Brief Synthesis of Making Magic, Appendix D)

From December 29, 2003 to January 6, 2004 inclusive, I transcribed the four participant interviews. I transcribed my own interview in mid-January. I chose to transcribe the interviews myself because listening to the voices and capturing what they were saying helped me identify the emerging themes and begin the analysis. On January 6, 2004 I sent each of the interviewees her/his transcript to review. This allowed them the opportunity to delete or add anything, or to withdraw from the study. They reviewed the transcripts and e-mailed me their feedback by January 20, 2004. All of them were satisfied with the content of the transcripts. Three of them sent back their transcripts edited for clarity, and the fourth responded with the answers to questions I had had regarding some words that were not clear on the tape.

Through January and into mid-February I analyzed the interviews. I read through the transcripts, underlining key themes and ideas. I set up a chart with the questions down the side of the page and the names across the top, including mine. I noted key words and phrases for each question and for each participant. I set up another chart based on the list of key words down the left hand side and our names across the top and I checked off who

had mentioned each of these concepts. I clustered some concepts together, for example, fun, play and humour. I put all the concepts that occurred 5 times (all of us) on yellow sticky notes, those that occurred 4 times on purple sticky notes, those that occurred 3 times on blue sticky notes, and those that occurred 2 times on pink sticky notes. I set up large sticky notes on my desk titled: magic – what is it?; how do we do it?; why do we do it?; what sustains us?; and what do we value about ourselves? I arranged the sticky notes in lines under each of these categories. I set up another large sticky note on which I wrote arising techniques.

In order to give the participants a summary of the themes to respond to in the Stage Two collaborative conversation I wrote three short pieces arising from the interview analysis (Appendix D) to send out by e-mail near the beginning of our conversation, Brief Synthesis of Making Magic, Peak Experiences, and Magical Facilitators.

The Brief Synthesis of Making Magic is based on the initial analysis of the interview themes clustered in answer to the following questions: What is the meaning of 'making magic, facilitating collaborative processes?; How do we do it?; and Why do we do it? I wrote the poem, Magical Facilitators, as another way to represent the themes arising from the interviews.

The Peak Experiences captured the essence of 'making magic' in story form. I use the term snippet because I snipped each of these stories out of the interviews. In the snipping process I added and subtracted words to tighten up the readability of the story but took

care not to alter the essence of the story. I selected stories, one per interview, which resonated most powerfully for me and, by making this choice, I hoped they would resonate for the others in our magical group. They did. Most of the words were those of the person telling the story. I edited their words to shorten the story to a snippet, the essence of the story. We do not speak in the same way that we write. When we speak we use filler and connecting words and sometimes go off on tangents. In recreating the stories for this thesis, I have left out the filler words and tangents in order to make the stories succinct and readable. As well as snipping from the interviews for the Stage One initial analysis I continued to do so in Stage Two and Stage Three, snipping from the collaborative e-mail and face-to-face conversations. In Stage Three, I created titles for each of the snippets.

Stage Two: Collaborative Conversation

In this stage I facilitated a six-week collaborative e-mail conversation that ended with an evening face-to-face conversation. In this Stage Two section I describe my multiple roles and follow with sections that flow, as did the conversation: collaborative climate, engaging conversation, and closure. Woven into these are comments regarding key components of this process as a magical process.

Multiple Roles

I had several roles in this Stage Two collaborative conversation: researcher, participant and facilitator. At times it was challenging to wear these three hats concurrently. As

researcher, I was on a quest to dig into the meaning and value of 'making magic' as facilitators of group processes. I had the responsibility to do something with the data that was emerging and write the thesis. Although the process was a collaborative one, in the end it was I, as researcher, who had the power to decide what to include in the thesis. I struggled at times with this responsibility and power.

As a participant, I was telling my own stories and contributing to the conversation. My participation was an important part of the collaborative process. I was taking the same risk that the other co-researchers were, being vulnerable through telling stories of the often challenging work of facilitating. Being a participant was also important due to the autobiographical nature of this inquiry.

As facilitator, throughout the process I hoped that I was doing what I was researching, that is, 'making magic' in facilitating the conversation with the inquiry co-researchers. I was reflecting-in-action (Schon, 1983) as I facilitated the process in order to respond to the participants and encourage the conversation. I wanted to develop the group, create a safe space for them to take the risks required to share ideas and stories. Doing this in an asynchronous communication mode such as e-mail is a challenge. To meet this challenge, as I would in my facilitating practice, I designed a structure for our conversation that would allow participation, flexibility and opportunities to delve into notions of 'making magic.' The others also had multiple roles as participants, feedback givers, co-facilitators and co-researchers.

Collaborative Climate

In my first e-mail of Stage Two I set out a frame for beginning the community building process, to create an inclusive environment for this collaborative e-mail conversation. The introductory phase of any facilitation is an important part of creating a climate for magic to happen, one where community (Wlodkowski & Ginsberg, 1995; Palmer, 1998) is begun by establishing inclusion, "a learning context in which all learners and teachers feel respected by and connected to one another" (Wlodkowski & Ginsberg, 1995, p. 27). Creating an inclusive climate is an important element throughout a facilitated session, but most importantly in the beginning phase. One of the themes that came out of the interviews was that we all begin a group process with structure and we modify the structure wherever possible in order to respond to individual and group needs. Key elements of a group process include being clear on the structure (agenda, outline, timelines) of the process, and creating inclusion by doing introductions, setting ground rules for the process (agreements) and finding out the expectations of participants. I began the collaborative e-mail conversation by including these structures and activities in my initial e-mail of February 13, 2004 (see Appendix C). I proposed the following timelines for the conversation: get to know each other by responding to the points in my initial e-mail (February 13 – 23); respond to my draft analysis that I would send to them by February 20; dialogue regarding the themes and stories (February 23 – March 8); and wrap up the conversation (March 8 to 15). I asked them to respond to four points: 1) tell us if the timelines work for you; 2) introduce yourself; 3) suggest process agreements; and 4) share expectations of this conversation. Glynis responded the same day. Sandy responded a few days later saying he was out of town and would not be able to respond

until February 25. Liz said she was very busy and would respond by February 25 as well. Leslie's e-mail wasn't working that week and so I called her and re-sent the message. Everyone responded to this initial e-mail by February 24, 2004.

Sandy suggested the timelines be extended from finishing by mid-March to the end of March, and everyone agreed with this change. Responding to participant needs, such as this timeline change, is an important part of facilitating a collaborative process.

Each co-researcher included some personal information in her/his introduction as well as the description of her/his consulting practice that I have included in the Magical Group section of this chapter. This began the process of inclusion. Each one of us was becoming present by introducing ourselves in our first e-mails. By including personal as well as professional information, we provided a more holistic view of ourselves. We wrote briefly of significant others in our lives, our interests and passions, and struggles with juggling many responsibilities. In the rest of this section, I include the co-researchers' own words from each of their introductions in response to my three requests: to know why they were interested in participating in the study; to establish our collaborative group's agreements; and to know their expectations of the process. I include these here to illustrate with the co-researchers' words the inclusive climate setting process. This process is critical to 'making magic.'

The following are the responses, in the collaborative e-mail conversation, to the question, "Why are you interested in participating in this study?"

- *I'm interested in participating in this study because I like the idea of contributing to an academic study that has magic in its title! Given the highly rational and quantitative nature of some academic studies, this feels like a mildly subversive activity, and it appeals to me. I expect it to be an opportunity to reflect, learn, clarify, grow – to hear the stories of those engaged in magical work. As a home-based professional, I like e-conversations. They can variously be my PD, my coffee break, my motivator, my reminder of an outside world, and more. (Glynis)*

- *I quest for a deeper understanding of 'making magic' and seek your stories and ideas to help me in this quest. (Jeanie)*

- *I'm interested in participating in this study because I've known Jeanie since 1970 when we were studying for our BA's at UBC, and we've travelled parallel and sometimes cross over paths all these years. We have reconnected in the last 5 years and find ourselves at a very similar place in terms of our work. The opportunity to explore that work with her and others was not to be missed. I welcome the opportunity to be reflective, to grow, and to change. (Liz)*

- *I am happy to be participating in this work. For me it is professional development…getting to work with others doing cool stuff…sharing ideas…playing at a leading edge…working with magic…and witnessing/supporting Jeanie in her doctoral process. (Leslie)*

- *I am interested in participating in this study because of belief in both Jeanie and in the subject matter. (Sandy)*

I use the term 'agreements' for the interpersonal process ground rules that I develop with a group. This particular group of facilitators all use similar processes. In a face-to-face setting, I facilitate the development of agreements with the group, listing the suggestions on a flip chart as everyone agrees to them. In this collaborative e-mail conversation, the agreements arose asynchronously and since there were no challenges to any of the suggestions we accepted all suggestions. These included:

- *I'd invite mutual respect, a willingness to identify assumptions that we think we see that others may not have noticed, honesty. I'd like for us to have the right to pass at any time if we feel unable or unwilling to answer a particular question or contribute to a particular conversation, and yet commit to sharing responsibility for keeping the conversational ball rolling. I'd love for us to speak from the heart. If I happen to offend someone unintentionally, I'd like to know that they would identify how they're feeling in a clear way (without doing whatever the electronic*

version of yelling is) and they would first assume that this was indeed unintended rather than malicious. I don't want my words cut and pasted out to anyone outside our group or otherwise passed on without my explicit permission. (Glynis)

- *For all of us: share only what we want to share (the right to pass); share ideas and make suggestions for this process; write as briefly and as succinctly as possible to tell our stories and share ideas; reply to all.
  For me: represent what happens in this conversation in a respectful, honouring way. (Jeanie)*

- *I don't know if there's anything to add to what's been written already – respect, ability to pass, to be tired and not into it sometimes, to speak our truth as we experience it and that to be okay. (Liz)*

- *Honesty, a genuine desire to share for the greater good…and all the others put forward so far. (Leslie)*

- *I would like to see our work together involve exploration, lots of questions and mutual learning. I would like us to also be aware of the time and other demands that any of us may face at any moment in time and to work around those demands as they affect any one of us. (Sandy)*

Their expectations of this collaborative process provided insight for me into what was important for these people and included:

- *Fun, stories, inspiration, insight into others and self. And I'm hoping to discover some ideas that, with permission, I can use and/or adapt in my own practice. (Glynis)*

- *We will get to know each other better through sharing our passions for 'making magic.' Our quest will be full of joy. (Jeanie)*

- *New ideas, connection, challenge, perhaps that we meet in person at some point in the process. (Liz)*

- *None really…I'd appreciate some conversation on what motivates us…deeply and how do we know that we know type questions. I'm just happy to be playing with you all. (Leslie)*

- *I want to grow and learn, contribute and listen, expand my horizons and connect with others who do similar things. I expect the conversation to be mutual, challenging and satisfying. I expect to learn more about collaboration, conversation and magic! (Sandy)*

I followed up on Liz's expectation that, "perhaps, we meet at some point in the process." Everyone was keen to meet and we were able to find an evening (Monday, March 29, 2004) when we could all meet. Glynis tacked a stopover in Vancouver onto a business trip. Leslie agreed to come over from Victoria and Liz and Sandy were in Vancouver at that time. A face-to-face get-together was not part of my original inquiry design, and is an excellent example of what can happen in any facilitated session, that is, in asking for input from the participants, the facilitator responds by re-designing the agenda. I was excited to be able to respond and host the get-together at my place.

Engaging Conversation

Although I have described the introductory phase of the collaborative conversation in a linear fashion, in fact, it was not linear. In this asynchronous mode of communication it is especially difficult to facilitate a linear process. People respond when they have the time and inclination to respond. We all were in our own physical spaces, far away from each other, and living busy lives. On February 22, 2004, before all of the other co-researchers sent out their introductory e-mails, I sent out my own response, Some Magic Pieces for You (see Appendix C), to that e-mail and the three pieces of initial analysis for everyone to respond to, A Brief Synthesis of Making Magic, Peak Experiences and Magical Facilitators (see Appendix D). Leslie responded to the analysis before her introduction and continued throughout the conversation to respond in spurts, where the energy was for her and when she had the time. Glynis and Sandy were more consistent in responding, but they too had times when they were not able to respond. Early in the conversation they began to actively interact and spark off each other's ideas. Leslie would join in when she

was available, sometimes all in one day and then not for several days. After her initial introductory e-mail Liz did not enter the conversation in an active way but did check in to let people know why she was not able to actively participate.

In sending out my own response to my initial e-mail, I wanted to emphasize that I was a participant as well as the facilitator/researcher in this process. I also shared personal as well as professional pieces of myself in this introduction, love and joys in my life. I carefully thought through the level to which I would reveal myself in these introductions as I would in any facilitation, paying attention to the context (research project), the people (participants/co-researchers/colleagues) involved and the purpose of the facilitation (reflect on the meaning and value of 'making magic').

Each of the three pieces of initial analysis that I sent out included a prompt to respond to and in my e-mail I invited the co-researchers to do any of the following: make comments; ask questions; analyze; write stories and/or poems; share ideas, resources, and techniques for how to 'make magic.' This is an example of the kind of structure a facilitator can use to engage participants in the construction of meaning. Both structure and engagement are important elements of 'making magic.' Sending out my poem was also an example of facilitator vulnerability, an important element of magic that I explore in Chapter Five. I am not a poet, so felt very vulnerable sending this poem out to the group.

In response to these three pieces, Liz, in her introductory e-mail (February 23), said that she had nothing to add to the Brief Synthesis of Magic. Leslie (February 22) and Glynis

(February 24) each responded to the Brief Synthesis with general agreement and a few suggestions to add. Sandy (February 27) responded to my February 22 e-mail with a long list of questions. The conversation was truly asynchronous in nature; whenever people had the time and the inclination they would respond to some part of what I had sent out. Each person responded in her/his unique way. This was a collaborative experience where everyone had equal opportunity to participate and to do so in her/his distinctive way.

The conversation bounced around among Glynis, Sandy, Jeanie and Leslie from February 24 to March 3. It was full and rich. All kinds of sharing happened – questions, responses, more questions, themes, stories, poetry, quotes, and word roots (etymology of key words being used). On March 4 Sandy sent an e-mail to me and copied to us all saying, "*what would be most useful for me now is some direction from you as to what you see emerging, what you'd like us to focus on, or whether we should just keep 'talking' as we have done over the last while.*" It was a great example of shared responsibility, a participant taking responsibility for stating his own needs. As will be discussed later, in facilitations that are particularly magical, the sharing of responsibility for the process, such as this example, is an essential component. As well it reflects another important component of magic, that is, being responsive to participant needs by being flexible and open to suggestions.

On March 5, I responded to all, thanking Sandy for his request, asking Liz to let us know where she was at with her response, reminding her that passing is okay too, and suggesting new timelines. These were: by March 8 I would send out a synthesis of what was emerging in this conversation and directions for the group to respond to; by March

22 the responses would be due; and on March 29th we would meet at my place to connect and close the conversation. Glynis suggested co-facilitating the March 29 get-together. Sandy, Leslie and I responded positively to her suggestion. In this way we were modelling the openness of magic, being flexible to respond to participant ideas.

On March 9, I sent out an e-mail, Summary and Directions (see Appendix C), that listed some themes so far and an invitation to continue to inquire narratively by telling stories so we could "peek into our peak experiences," and to keep bouncing ideas around. I ended with a postscript to Liz saying I hoped she would be feeling better soon. I had left her a voice mail to check in with her. She had responded with a voice mail to me saying she had been sick. I chose to add the postscript to my e-mail as a way to make her visible to the others, keeping the connections happening that are so necessary to magic. Liz responded to me with more detail about her life challenges and I suggested she send a brief message to all to let them know why she was being silent. She did. The rest of the group included in their responses to my e-mail a sympathetic acknowledgement of Liz, and welcomed her into the conversation.

From March 14 to 21, Glynis, Sandy, Leslie and I continued the conversation. On March 21 I sent out an e-mail, Continuing and Closing Our Conversation (see Appendix C), including a plan for our March 29 gathering. Glynis, Sandy, Leslie and I continued to converse through questions, responses, and stories. Liz sent a message to us all saying she was having computer problems as well as continuing family crises, but she was

looking forward to our get-together. We all responded with sympathy regarding her life challenges and wished her well.

Closure

Over the weeks of our e-mail conversation I observed an interesting change in my behaviour… I would go onto my computer first thing in the morning to see if one of you had entered something since I'd last been on…(Sandy, collaborative face-to-face conversation).

Endings are an important part of group processes. I suggested to the co-researchers that the face-to-face get-together be a celebration of our work together. It was a way for me to say thanks to them and for us all to say thanks and acknowledge each other's gifts.

On March 26, I sent an e-mail asking them whether they would be comfortable with our get-together being audiotape-recorded and/or videotaped. I audiotape-recorded the face-to-face conversation since there was unanimity for audiotape-recording but not for videotaping.

We held our face-to-face conversation from 6:00 pm to 8:30 pm on March 29 at my home. It was a magical evening. As each person arrived I made introductions where necessary: Sandy and Liz; Liz and Glynis; Leslie and Liz; Leslie and Sandy. We chatted informally for a short while, and then gathered around the dining room table on which I had laid out the snacks. My initial suggestions for the evening were to eat and chat a bit first, then go around the circle one person at a time to say whatever they wanted to about magic and what this inquiry process had meant to them. As in our online agreements,

passing was okay too. Everyone ate except me. I was too focussed on facilitating the process. I acknowledged their contributions to my research, thanked them for their gifts of time, stories and ideas. I explained where I was in my research process, sharing some of my challenges and insights and explaining that we were going beyond the cognitive understanding and tools and tips of facilitating, to a more holistic view, including the emotional and spiritual dimensions of ourselves and our participants. I stated that presence, authenticity, and creativity were some of the themes arising. I said that we had been delving into the 'who we are' that is behind the 'what we do' as facilitators working to bring the 'who they are' of our participants into the collaborative process. As in our facilitations, where we often bring in minimal structure and allow the process to emerge, I was doing the same here. I was suggesting a structure, but letting my co-researchers actively participate in the evolution of what would emerge. I was having faith that something magical would emerge.

Sandy suggested I tell a story and then see what we would do with it. So I did, and from there we conversed in relation to the story and other stories emerged, not around the circle but back and forth weaving together in no particular order. Everyone spoke and listened; shared silence and belly laughed; shared stories and ideas; built on pieces of our e-mail conversation and created new pieces to share. About 7:30 pm, as I would in any facilitation, I did a check-in regarding time and comfort. We moved to the living room comfy chairs and agreed to finish around 8:30 pm. The storytelling continued to weave back and forth in a very equitable way, each one of us paying attention to who was speaking, taking responsibility for contributing by both listening and sharing ideas and

stories. I felt that I was part of an amazing co-facilitation. I was the meta-facilitator amongst these wonderful, thoughtful co-facilitators. Responsibility was shared for keeping the conversation moving and the energy flowing. It was a very stimulating experience.

Around 8:15 pm I suggested that, considering the time and commitment to be done by 8:30 pm, we close by each saying something to the group. I started by thanking them and saying that I would be in touch to let them know what I was writing, checking in at different stages. Each of them spoke about the meaning of this process. We thanked each other for the gifts we had given each other in this process. Liz spoke about being both horizontally and vertically gifted in this process, horizontally from each other and vertically down into her own self-reflection (see quote in Chapter One, Inquiry Purpose and Significance). Glynis brought each of us a physical gift, pieces of driftwood. We each selected the one that appealed to us. Mine looks like a driftwood magic wand! Sandy said that this experience impacted his daily routine (see quote at the beginning of this closure section). Instead of journaling first thing in the morning, he would go to his computer to check to see if any of us had sent a message. Leslie said that this process had been a healing for her, seeing herself in a new place from being in this rich experience with colleagues. It is rare, as independent consultants, to have opportunities to get together like this to reflect on our practices.

Stage Three: Quilting the Snippets

Hi Glynis, Leslie, Liz and Sandy,
This morning as I was organizing my tapes from Monday evening, listening to our voices
telling marvellous stories, I got goose bumps – aah the magic? I loved the weaving we
did – stories, ideas, feelings – all of us facilitating in a web of connections. It's going to
be a challenge to write in a way that captures this magic. I'm ready to try, energized by
your gifts and your support.
Thank you once again,
Jeanie (e-mail, March 31, 2004)

Stage Three is the final analysis of the data and writing of the thesis. This was the most

difficult stage of the research process. I had a lot of wonderful data, stories, themes, ideas

from the interviews and more stories, themes and discussion of ideas from the e-mail and

face-to-face conversations. But what was I to do with it all?

I began Stage Three in mid-February while I was still engaged in Stage Two, by setting

up the frame of my thesis based on my thesis proposal. The frame included a title page,

abstract page, table of contents, the first three chapters, references and appendixes. I

began the iterative process of adding, deleting and re-arranging. The Table of Contents,

which I kept updating, allowed me to feel like I was progressing, seeing what was

emerging. Throughout Stage Three I continued to read and move through literature that

was related to the themes arising, discovering which was most relevant to this inquiry. As

well, I created snippets from the interviews, collaborative conversation, and my own

stories, adding titles to each one as a way to capture some key idea and/or engage the

reader.

Chapter Two: Magical Inquiry was the first to emerge quite clearly because it was the story of the inquiry's methodology that was itself an example of my topic, 'making magic,' facilitating collaborative processes. I began Chapter Two with the five Magical Snippets, our peak experience stories from the interviews and realized that I wanted to start every chapter with a story or quote from the data or the literature. I kept in contact with my thesis supervisor throughout. After reading the initial version of the first two chapters, she suggested moving the snippets that I had at the beginning of Chapter Two to the beginning of Chapter One as they were a powerful representation of magic and could serve to engage the reader immediately. As well, I placed the *Birth of the Magic Wand*, before these snippets and without introduction, in order to engage the reader through a glimpse at the magic and to locate the inquiry autobiographically.

Part way into quilting the snippets and themes, still struggling with which ones to select, I was working on an appreciative inquiry project and came to the realization that I was not using an appreciative inquiry approach to theme development. I was using the traditional reductionist notion of counting how many times a theme had arisen rather than following the energy of the stories and themes. So I asked myself what resonated for me over and over in my data and in my journals. Presence! I kept on writing to learn what it was I could say about presence and how I could frame it, continuing the iterative process of writing, re-arranging, deleting and adding.

On July 6, 2004, I sent out the draft of Chapter One and Chapter Two to the co-researchers and asked them to review them, especially Chapter Two, for how I had used

their words and how I had told the story of our journey through Stages One and Two. As well as feedback on these chapters, I requested their love and support as I continued to work through this process. They all responded by mid-July with wonderful words of support and agreement that Chapter Two captured our experience together. Glynis sent me a few editing changes to her peak experience story and to her e-mail response to why she wanted to participate in the study. I edited the thesis accordingly.

The messiness continued. I felt encouraged by the feedback from the co-researchers and from my thesis supervisor. So I kept going in my discomfort, trying hard not to lose hope, writing in clusters of themes, pulling in snippets, notions from the literature and changing the clusters. Some of the concepts from the literature were too big to weave in. So I chose to insert a Chapter Three: Literature Review. Why not be traditional for a while and see what happens? Then I took a week's holiday from writing to teach a course in the Provincial Instructor Diploma Program – Design of Curriculum and Instruction. What a wonderful week to spend time 'making magic.' In reflecting on my students' challenges with the complexity of course design, I was inspired to try to put into practice what I was telling them to do: to jump in; start with brainstorming ideas and basic structure; and keep returning iteratively to modifying it as it evolved. Designing curriculum was just like writing a thesis!

In the last week of July, as I moved along in the messiness, I played with my quilting metaphor some more and changed the titles of Chapters One and Three, respectively, to Magical Fabric and Magical Notions. I soon got bogged down in the vast amount of emerging literature and personal stories that arose as a result of writing. The

transformative learning literature led me to write about transformative places in my own learning journey. I was getting more and more frustrated, not being able to see a clear path through the literature and the themes. I met with my supervisor at the end of the first week of August and she guided me through some key places. She helped me see that appreciative inquiry was an overarching theory, model, framework, and tool for this inquiry. This inquiry is a case of an appreciative inquiry into facilitating collaborative processes. So I wrote more about appreciative inquiry, revamping what I had already written. I continued to worry about where everything would go, too much here, too little there, too repetitive.

In mid-August my partner read what was emerging, Chapter One to Chapter Four and, with her feedback, I was encouraged to keep on going, moving from Chapter Three to Chapter Four. I cut out what I had written in Chapter Four to that point and started again. This time I began with the Brief Synthesis of Making Magic and then the snippets. I let the snippets guide me, as is done in an appreciative inquiry, following the energy of the emerging themes. I titled each snippet and used sticky notes to sort and keep track of the flow between snippets. Each sticky note contained the snippet title, author and origin (interview, collaborative e-mail conversation, collaborative face-to-face conversation, journal). I stuck these on my office mirror, moving them around as I added them into and/or moved them around the thesis. I framed out Chapter Five: Ongoing Magic, beginning with a snippet about the impact of this inquiry on my practice and outlining the sections I planned to write. On August 23, I handed in to my committee an unfinished

version of a complete draft with a lot of "TO BE CONTINUED" notes inserted where there was more to come.

I met with my committee on September 7. They suggested that I re-work Chapters Three to Five, linking each story to magic more clearly, and guiding the reader through. They agreed that I would submit each revised chapter only to my thesis supervisor. After her feedback and further revisions, I would submit the full revised thesis back to the whole committee. I sent an e-mail to the co-researchers with an update on my process, asking them if they would like to see each revised chapter. Only Glynis wanted to see each chapter as I sent it in to my supervisor. So, at each stage of sending my supervisor a chapter, I also sent Glynis the same chapter and she gave me encouraging feedback with some specific useful suggestions.

After meeting with my thesis committee in early September, I let ideas percolate as I immersed myself back into work, much of which was 'making magic.' The impact on my practice was amazing after several weeks over the summer of full time immersion in writing and analyzing my data, being away from the real world of 'making magic.' I realized how deeply my inquiry, reading, and writing were deepening my understanding of facilitating collaborative processes, of appreciative inquiry and of teaching teachers/facilitators.

In October, I finally created some space in my schedule for several days of writing time and began to dig into appreciative inquiry and read more in the area of transformative

learning. I was happy with the section on appreciative inquiry. It seemed to flow and my stories were illustrative rather than dominant. As I continued to expand the transformative education literature I was reading, I realized that at some point I would need to create boundaries. Feeling very frustrated with all of the pieces and finding it hard to see the links throughout, I decided to undertake the difficult process of culling, cutting out pieces that no longer worked in the frame that was emerging. This was very challenging, in some ways more challenging than adding pieces in. I set up a file called 'cut pieces' and proceeded to cut and paste into it, trimming, adding in where necessary, working on transitions between sections. Finally, on October 22 I handed in a next draft of Chapter Three to my supervisor and moved onto the revisions of Chapter Four, getting back into the data. I was surprised to find that some of the cut pieces from Chapter Three now seemed appropriate for Chapter Four, so I sewed them into the appropriate places as I went back to dig deeper into the snippets that I had put together for the first draft. I moved through the snippets of 'making magic,' starting with the first one, my peak experience story. Not only did I add in cut pieces, I began to see the relevance of including more stories. I went back to the data for more stories, themes and quotes.

On October 30, I met with my supervisor regarding Chapter Three. She suggested sub-headings to provide a clear map through the two sections, Appreciative Inquiry and Transformative Education, which I did, and continued working on Chapter Four: Magical Quilt.

Chapter Four: Magical Quilt developed as I reflected on the feedback to my initial draft. I decided to remove the first section on the meaning of magic that was the Brief Synthesis of Making Magic from the Stage One interviews, and to rename the Challenges section, Vulnerability and Courage. So now I had two sections: Making Magic, and Vulnerability and Courage. In the second section I added in stories of times where the co-researchers were vulnerable and/or fearful but where magic happened anyway, and continued with the stories that I had previously had in this section where magic did not happen. I re-analyzed all the way through, adding in and subtracting where necessary. I handed in Chapter Four to my supervisor on November 9 and started writing Chapter Five, which up to this point had just been an outline and a sample snippet to illustrate the impact of this inquiry on my practice. I took out the sample snippet. Instead, I added in two other snippets and filled in the outline. I handed it in to my supervisor on November 14 and I continued to work with Chapter Three: Magical Notions.

My supervisor and I met on November 16 to review Chapter Four and Chapter Five. She suggested dividing Chapter Four: Magical Quilt into two chapters based on the two sections of the chapter, Making Magic and Vulnerability and Courage, and to create sub-headings to guide the reader through. We agreed that the whole thesis, not just this chapter, was a magical quilt so I decided to change the chapter names to key themes. The new Chapter Four became Being Present and the new Chapter Five became Vulnerability and Courage. I created sub-headings for Chapter Five, but was not able to do the same for Chapter Four because the concepts were too interconnected; the themes re-occurred and wove in and out of the snippets. My supervisor also suggested changes to the new

Chapter Six, including ending the chapter with one of the stories that represented the impact of this inquiry on my practice. By doing this I created a way to end the thesis that matched the way I began, with a snippet.

On November 22, I e-mailed Chapters Four and Five to the co-researchers for a final review of their words, snippets and other quotes, and the analysis around these. Glynis and Sandy replied with edits to their stories and other feedback that I incorporated.

On December 6 I submitted a full thesis draft to my committee and e-mailed a copy to the co-researchers. This completed Stage Three of the inquiry. In the next chapter, I explore the literature of appreciative inquiry and transformative education that informed and is informed by this inquiry.

CHAPTER THREE: MAGICAL NOTIONS

Yesterday while I was meeting with my co-planning team of managers at the corporation, we quietly and thoughtfully created a customer service training day for 540 supervisors…weaving in all their requests, appreciative inquiry and multiple layers of excellent teaching and learning practice and as it emerged we just kept looking at each other in a place of solid knowing…and all felt goose bumps simultaneously…in the presence of magic…
(Leslie, collaborative e-mail conversation)

As the quote above suggests, appreciative inquiry and good teaching/learning practice are essential to 'making magic.' Therefore, in this chapter two main areas of literature are explored that provide notions that inform and are informed by this inquiry: appreciative inquiry and transformative education. Some of the notions are illustrated with examples from my own facilitating practice. The word notions is used intentionally to capture the intellectual notions from the literature, and, as well, the metaphorical notions needed to sew together the snippets and themes in Chapter Four and Chapter Five where some of these notions are seen as threads that weave through the snippets and as beads that enhance the overall magical effect.

Appreciative Inquiry

The appreciative eye can be developed to see the ordinary magic, beauty, and real possibility in organizational life. (Cooperrider & Srivastva, 1987, p. 165)

Appreciative inquiry is integral to this study, both methodologically and topically. This study is an appreciative inquiry, and appreciative inquiry is a component of 'making

magic,' facilitating collaborative processes. The qualities of appreciative inquiry are qualities of 'making magic,' collaboration, connection, imagination, creativity, energy, transformation and, of course, appreciation. Appreciative inquiry is a powerful framework for people to be present with each other, a key element of 'making magic.' In Chapter Two, I explained how I used appreciative inquiry (Watkins & Mohr, 2001) as a method in my study, especially in the design of the topic and the interview questions, and in the process of the interview and collaborative e-mail conversation. Also, I explained how appreciative inquiry is a type of collaborative research (Bray, Lee, Smith, & Yorks, 2000) and how this inquiry uses a collaborative process to explore the nature of facilitating collaborative processes. Bray et al. describe appreciative inquiry as a collaborative research tool used in action research for organizational and social system intervention. In this inquiry the co-researchers are not collaborating to intervene in any particular social system, but to explore our practices of working with organizations and other social systems. As a result of our collaborative reflections on our practices of facilitating collaborative processes we would expect our resulting actions to impact the systems with which we work.

In this section, I describe appreciative inquiry in more detail both as a tool and as a perspective through which I facilitate magic and live my life. I begin with the origins of appreciative inquiry in organizational development and action research. I present some of the theory behind appreciative inquiry and some models that have been developed based on the theory. I follow this with examples of applications of appreciative inquiry

including: community development; spirituality of adult education and training; appreciative pedagogy; teams; leadership and change; and everyday living.

Appreciative Inquiry: Origins, Theory and Models

Appreciative inquiry originated in David Cooperrider's doctoral research in the 1980s at Case Western Reserve University where he worked with Suresh Srivastva, his research supervisor. They argued for a generative model of organizational action research and change that challenged the traditional problem based action research model. Appreciative inquiry is an "action research model for a humanly significant generative science of administration" that is made up of four dimensions: "best of 'what is;' ideals of 'what might be;' consent of 'what should be;' and experiencing of 'what can be" (Cooperrider & Srivastva, 1987, p. 160). Beginning with positive images, the best of 'what is,' energizes the people in an organization to creatively generate the future of their organization by building on these positive images (Cooperrider, 1999). The problems are not ignored but reframed in positive terms in order to build on what already exists. An example of this kind of reframing is Avon-Mexico's successful award winning appreciative inquiry into the problems of sexual harassment and the under-representation of women in senior executive positions. The topic was reframed to valuing gender diversity and the inquiry investigated positive cross-gender working relationships (Cooperrider & Whitney, 2000; Watkins & Mohr, 2001; Whitney & Trosten-Bloom, 2003).

Cooperrider and Whitney (2000) address the question that is often asked about using appreciative inquiry, "what do we do with the *real* problems?" (p. 16) by explaining the five principles that are central to appreciative inquiry's theory-base of change: constructionist, simultaneity, poetic, anticipatory, and positive. The first principle, the constructionist principle, states that "human knowledge and organizational destiny are interwoven" (p. 17), in other words, organizations are human constructions and the real problems are also human constructions The second principle, the principle of simultaneity, "recognizes that inquiry and change are not truly separate moments, but are simultaneous" (p. 18), in other words, change happens as soon as we start to ask questions, to inquire. Therefore, the art of appreciative inquiry is in crafting questions that will elicit generative possibilities. The third principle, the poetic principle, states that "organizations are a lot more like an open book than, say, a machine" (p. 18) and, like poetry, are subject to "endless interpretive possibilities" (p. 19). Using collaborative narrative and dialogue allows for those multiple interpretive possibilities in the particular human system. The fourth principle, the anticipatory principle, states that "the infinite human resource we have for generating constructive organizational change is our collective imagination and discourse about the future" (p. 19), in other words, images lead actions. If the problems are central in our imaginations we are more likely to get more of the same, instead of using our imaginations to create other possibilities. The fifth principle, the positive principle, states that "building and sustaining momentum for change requires large amounts of positive affect and social bonding – things like hope, excitement, inspiration, caring, camaraderie, sense of urgent purpose, and sheer joy in creating something meaningful together" (p. 20). The focus on the positive does not

ignore the problems. Instead, focussing on the positive allows the energy of joy and excitement to take the human system to places that it might not even have imagined when bogged down in the problems.

Whitney and Trosten-Bloom (2003) add three more principles to the previous five: principle six, wholeness; principle seven, enactment; and principle eight, free choice. The sixth principle of wholeness suggests that all parts of the human system be involved in the transformational change and that "the experience of wholeness is one of understanding the whole story" (p. 69), allowing participants to focus on "higher ground rather than common ground" (p. 70). This principle suggests that there are multiple stories, and sharing these across the whole system allows people to share and explore the multiple views in order to make meaning together. The seventh principle, the enactment principle, "suggests that transformation occurs by living in the present what we most desire in the future" (p. 72). "'Acting as if' is self-fulfilling" (p. 72). This does not mean acting as if the problems do not exist, but reframing the problems to envision what the ideal would be and acting as if it exists. The eighth principle, the free choice principle, "posits that people and organizations thrive when people are free to choose the nature and extent of their contribution" (p. 75). This is a challenging principle to enact because many people do not think that they have a choice and/or their choices are limited through structural constraints. The literature on appreciative inquiry says little about the structural constraints in human systems that can impede people's choice and ability to contribute equally in dialogue. Where structural constraints are considered, they include brief mentions of oppression and power in relation to organizational culture and structures.

Ludema, Whitney, Mohr, and Griffin (2003) recommend that appreciative inquirers "understand that discrimination is institutionalized in the cultures and structures of organizations" (p. 218). Whitney and Trosten-Bloom (2003) suggest that appreciative inquiry can move organizationally oppressed people to be liberated, to find their own personal power to contribute to the social construction of organizational change. Missing from the literature is a recognition and discussion of the larger societal structural impacts on people's personal power, social constructions such as race, class and gender. In the transformative education section I explore societal structural issues of power and privilege. These are important concepts to consider in working with appreciative inquiry in organizations and in classrooms to 'make magic' happen.

A variety of models for human system change have been developed based on Cooperrider and Srivastva's (1987) four dimensions of an action research model described above: the Four-D model of Discovery, Dream, Design, Delivery/Destiny; the Four-I model of Initiate, Inquire, Imagine, Innovate; and the Five Generic Processes of AI (Watkins & Mohr, 2001). All of these are based on a paradigm shift from deficit-based organizational change models that focus on problems to be solved, to constructionist-based models that focus on the best of what already exists (Mohr & Watkins, 2002).

Watkins and Mohr (2001) connect all of the appreciative inquiry models and the four dimensions of Cooperrider and Srivastva's (1987) action research model together into five generic processes, "as a way of drawing attention to the essence of what AI is about

while emphasizing the flexibility of these processes" (Watkins & Mohr, p. 39). The five generic processes are:

1. Choose the positive as the focus of inquiry;

2. Inquire into stories of life-giving forces;

3. Locate themes that appear in the stories and select topics for further inquiry;

4. Create shared images for a preferred future; and

5. Find innovative ways to create that future. (p. 39)

The first generic process includes the 'initiate' step of the Four-I model and a fifth 'D' that often gets added to the Four-D model, 'define' the topic. The second generic process is the storytelling that is fundamental to appreciative inquiry. This process includes the following components from the other models: 'inquire' from the Four-I model, 'discovery' from the Four-D model and the 'best of what is' from the action research model. The stories arise out of interviews, usually done in pairs of participants using some variation of the generic interview guide as outlined in Watkins and Mohr (2002). The third generic process includes further inquiry and discovery into the 'best of what is' by working with the stories to find themes and topics. The fourth generic process includes the following components from the other models: the 'imagine' from the Four-I model, 'dream' from the Four-D model, and 'ideals of what might be' and 'consent of what should be' from the dimensions of the action research model. In creating shared images at this stage, participants develop provocative propositions. "A provocative proposition is a statement that bridges the best of 'what is' with your own speculation or

intuition of 'what might be'" (Watkins & Mohr, 2001, p. 141). The fifth generic process includes: 'innovate' from the Four-I model, 'design' and 'delivery/destiny' from the Four-D model, and 'experiencing what can be' from the action research model. These appreciative inquiry models, variations of them, and appreciative processes are used in a variety of contexts for human system innovation and change. In the next section I explore some of these.

Appreciative Inquiry in Action

Appreciative inquiry originated in action research. Other contexts that use appreciative inquiry and processes apply these to creating innovation and change through energizing the people involved to action. Some of these that are relevant to this inquiry are: community development, spirituality in adult education, appreciative pedagogy, team building, leadership, and everyday living.

Community Development

From problems to strengths, prepared by the International Institute for Sustainable Development (2000a), applies appreciative inquiry to community development, and suggests that the shift from focussing on community problems to community strengths has a greater potential to advance sustainable development. Problem based approaches that are used to uncover the needs and fix them, do not lead to ongoing community participation after the outside community development organization leaves. On the other hand, development using appreciative inquiry engages and inspires the community to

recognize and build on their strengths increasing their own ongoing capacity for community development. An example of this is the project where the International Institute for Sustainable Development (2000b) partnered with the Skownan First Nation in Northern Manitoba to develop a process that would:

- Help Aboriginal people identify community values with respect to the forested landscape around them;

- Explore ways to respect and reinforce these values in the development and implementation of a community vision;

- Effectively express these values to decision-makers in the provincial government, resource industry and to other stakeholders; and

- Stimulate discussion by all stakeholders on ways to incorporate Aboriginal values into land-use and resource management decisions. (p. 3)

The use of appreciative inquiry in community development projects is growing all over the world. Frequently, on the international appreciative inquiry listserv managed by Case Western Reserve University, practitioners share stories of community development initiatives. In my own practice, I have given appreciative inquiry workshops for community developers. At the end of Chapter Six, to illustrate the impact of this inquiry on my practice, I include a snippet about one of these appreciative inquiry workshops that I conducted with federal government program coordinators who work with First Nations communities.

Spirituality in Adult Education

English, Fenwick and Parsons (2003a, 2003b) suggest a five step systematic approach to appreciative inquiry adapted from Hammond (1998) that could be applied "to begin valuing and appreciating the existing spiritual dimensions of adult education and training" (English et al., 2003b, p. 146). Hammond's steps are similar to the models and five generic processes (Watkins & Mohr, 2001) presented above. In particular, English et al. (2003a) suggest the use of appreciative inquiry methodology in Christian institutions of higher education "as a positive approach to recovering spiritual values and mission" (2003a, p. 71). They say that appreciative inquiry is "a spiritually based and infused method of inquiry" (p. 80). The concept of spirituality that English et al. (2003b) use is the human search for meaning through interconnectedness with other humans. Their exploration of spirituality and adult education and training is based on three assumptions. The first is that "education is about giving meaning to life and to living and, first and foremost, assisting the growth of the human spirit" (p. 7). The second is that "spirituality is about more than religion" (p. 7) and third, "that adults enact their spiritual side in a variety of ways"(p. 7). In the section on transformative education I expand on the notions of spirituality and education.

English et al.'s (2003b) five-step appreciative inquiry includes the first step of choosing the topic of spirituality and gathering people together from one's community of practice, learners, educators and staff. Step two is to engage participants to tell stories in response to questions such as "can you recall a special moment when you felt spiritually connected to others in your practice?" (p. 147) and other questions which dig deeper into these

stories. Step three is to further the exploration with stories in response to questions such as, "can you recall a special moment of being spiritually grounded in your practice?" (p. 147), and other questions which dig deeper into the stories. Their step four is to have participants chart the stories on the walls, look for themes, and write provocative propositions from these. Step five is "one of action and innovation which may not occur right away" (p. 148). They do acknowledge the challenges of appreciative inquiry when there are major problems and state, "appreciative inquiry does not ignore the roadblocks, but suggests ways to acknowledge but not focus on them" (p. 148) and "asking appreciative questions seems to touch something deeply important to people" (p. 148). They also suggest day-to-day appreciative processes for transformational change that can enable adult education and training to be more spiritually based, a key element in 'making magic.' These processes are similar to Bushe's (2001) tracking and fanning that I describe below. Because English et al. (2003b) locate these processes in education, they could also be considered notions that fall within the category of the next section, appreciative pedagogy.

Appreciative Pedagogy

Appreciative inquiry has also been used as an approach to teaching. Yballe and O'Connor (2000) describe appreciative pedagogy, particularly in the management classroom, as the adaptation of appreciative inquiry's basic beliefs, values, and social inquiry process to pedagogy including:

> A. Bias for experiences of success
>
> B. Valuing success as the building block of positive vision

C. Belief in the profound connection between positive vision and positive action

D. Valuing social (face-to-face) inquiry. (p. 476)

They describe examples of daily activities based on appreciative pedagogy that focus on students' success stories and on the students' learning to apply the skills to inquire appreciatively themselves. The consequences of appreciative pedagogy include students more actively, meaningfully and energetically engaging in their learning. In my classrooms I have found that students are much more eager to learn and grow when they have their successes recognized first. The suggestions for improvement are much easier to hear when successes are acknowledged.

Most of my students are adult educators, so I hope they take the appreciative skills with them into their classrooms and workplaces. An example of appreciative skills is the feedback process in my facilitating/teaching skills courses and workshops where participants teach mini-lessons. After each of these mini-lessons the teacher receives feedback from the other participants, focussing on strengths and offering suggestions. At the end of this feedback session I ask the teacher to summarize what worked well in the mini-lesson, and to tell us what s/he would like to work on for next time or in her/his own teaching situation. I remind them that they want to keep doing what is working well, building on their strengths. It is often difficult for people to recognize and acknowledge what they are doing that is working well and much easier for them to focus on being self-critical, to see what is wrong. As a result they often forget to build on those strengths by

continually focusing on fixing what is wrong. I find that people are much more willing to really understand any problems and, are therefore more able to fix them if they are recognized first of all, by themselves as well as by others, for their strengths.

Team Building

In my team building course, *Power of Teams*, and in team building facilitations, I use Bushe's (2000b) appreciative inquiry exercise on the topic of 'best teams.' In this exercise the teams tell stories of peak experiences working/learning in teams as a way to identify the characteristics of effective teams. Bushe suggests that this exercise is "particularly appropriate for new teams and may help the team do some important 'norming' without having to go through 'storming'" (p. 186). The terms norming and storming that Bushe uses are from Tuckman's (1965) four stages of group development: forming, storming, norming, and performing. Forming is when a new group of people first comes together. In this stage people are often polite and unsure of each other and the rules of behaviour. Storming may occur when people make their own needs felt, and norming is when the group develops their norms, either implicitly or explicitly, for working together so they can reach the next stage of performing, working together according to those group norms. All of the co-researchers in this inquiry talked about the importance of the facilitator developing group guidelines with the group. In my practice this has been an important process for moving the group to the performing stage.

Bushe (2000b) suggests the best team exercise may aid in developing group norms through the use of appreciative stories. In my team building course, *Power of Teams*, as

well as facilitating the development of group guidelines, I use the best team exercise at the beginning of the course for the teams to dig deeper into what makes teams work well. The teams are newly formed distance education teams who will be working/learning together online via the WebBoard (course software) to explore the concepts of the course, through team exercises. Since they do not have experiences yet in this team, they tell stories of peak experiences working and/or learning in other teams. The best team exercise is one way for them to develop some common understandings of what makes an effective team in order for them to work towards their own effectiveness.

In workplace team development with an ongoing team, this exercise, as Bushe (2000b) suggests, "is both more challenging and has the potential to be a more transformational experience" (p. 187) than with new teams. Unlike a new team, an ongoing team already has established implicit or explicit norms, culture and ways of being together. Bushe suggests that new teams are likely to see the usefulness of a best team exercise, but ongoing teams may perceive an appreciative inquiry intervention, if it "is not well positioned and/or does not help deal with an important issue" (p.187), as a "pollyannish waste of time" (p. 187). Bushe describes situations where appreciative inquiry is effective with ongoing teams such as in team building retreats to increase effective relationships or in an intervention when the team is stuck and needs a creative way out. He describes a situation where the appreciative inquiry pushed the group to surface undisclosed resentments. He calls this a paradoxical intervention because the appreciative inquiry actually forced the group to see how unappreciative they were of each other. This cathartic event allowed the group to surface and work through past hurts and resentments.

This kind of situation is very challenging and requires skilled facilitation. As Bushe says, "this is a powerful intervention and not for the timid. But then so is stepping into the middle of a hostile, frustrated team" (p. 190). Bushe cautions that it is important that the inquiry is appropriate to the issues that the group faces and that to be "an effective change process key decision makers need to be intimately involved" (p. 187). I refer to this recommendation again in Chapter Five in relation to one of my own appreciative inquiry stories, *The Disappearing VP*.

In my own team building practice I am most often working with ongoing teams as a facilitator due to difficulties that they have been having working together. Through appreciative inquiry I hope to create a space where they can begin their transformation into a more effective working team. In cases where there is serious conflict, before they can begin to appreciate, there is usually a need for expressing individual concerns. In these cases I usually do individual interviews with the team members before designing any kind of intervention process. They may not be ready to appreciate anything. Appreciative inquiry, like any team intervention, is not something to be used without extensive research into the nature of the team, its needs, and the team context.

Leadership

Carr-Stewart and Walker (2003) describe the use of appreciative inquiry in a number of educational research and leadership development settings. In particular, they describe a research project into the work life of Canadian school superintendents. The affirmative focus of the inquiry was the best aspects of superintendents' work lives. The

superintendents went through the process of appreciative interviews, capturing themes and creating provocative propositions for their work. Carr-Stewart and Walker provide several examples of these, one of which is:

> We are committed to leading learning organizations. We envision educational and societal processes that value creativity and flexibility in designing opportunities to meet the individual needs of kids. Working with our partners, we will ascend the mountain to enable us all to see a better world. (p. 14)

This is a very powerful vision for school leaders.

Another leadership example is from the business world where Bushe (2001) applies appreciative processes to leadership, to what he calls clear leadership. He describes the four selves of clear leaders: the aware self, gaining knowledge; the descriptive self, communicating honestly; the curious self, helping others communicate; and the appreciative self, inspiring the best in people. Bushe says that exceptional leaders in empowered organizations "focus more on what's working and what they want more of, and less on problems and what they want less of" (p. 155). These leaders have an appreciative stance toward management and change through being an appreciative self, having an appreciative mind-set, "attending to and amplifying positive inter-subjective truths" (p. 155). In order to appreciate or grow what is working well, Bushe suggests 'tracking' it, looking for and seeking it, and 'fanning' it, encouraging more of the desired behaviour. For example, tracking can be watching in a meeting for behaviour that is contributing to the group process. When such behaviour is seen it should be fanned. Fanning could be encouraging the people who have displayed the behaviour to do more

of the same by letting them know that they have contributed effectively to the group process. Appreciative inquiry is based on the theory that what is paid attention to will grow or appreciate.

Everyday Living

Appreciative inquiry can be applied to everyday living by having an appreciative frame of mind. Bushe (2000a) suggests appreciative process can be used day to day to effect change. "Appreciative process theorizes that you can create change by paying attention to what you want more of rather than paying attention to problems" (p. 107). Having an appreciative mind-set can be applied everywhere at work, at home, at play and with anyone else or with oneself. It is an approach to day-to-day living that seeks out the positive. Cooperrider and Srivastva (1987) describe this as having an appreciative eye. I use appreciative inquiry in a variety of ways in my own practice, for example, as a research methodology, for group and organizational development, in teaching, and in my business development. It is not easy, because in Western culture we have been trained to problem solve, focussing on what needs to be fixed rather than celebrating what is working well. I aim to live appreciatively of myself and others, as my mother used to sing to us:

> You've got to accentuate the positive,
>
> Eliminate the negative
>
> Latch onto the affirmative, but
>
> Don't mess with Mister In-between
>
> (words and music by Harold Arlen and Johnny Mercer, 1944)

This song represents an attitude to life that I would call appreciative, with its focus on the positive. An appreciative perspective on the world tends to bring magic.

At the same time, as illustrated in Chapter Five, sometimes it is working through the negatives and in-betweens where magic happens.

In summary, appreciative inquiry is used in many contexts as a tool for human system change and approaches to everyday living. Appreciative inquiry and appreciative perspective involve human connections for the purposes of some kind of transformation, individual, group, organizational, and/or societal. Appreciative inquiry creates opportunities for people to connect to each other by being more fully present with each other through storytelling and collaboration that focuses on the positive core of the particular human system.

However, the appreciative inquiry literature lacks substantive discussion of the impact of the differences that people bring into the process. In particular, the appreciative inquiry literature does not explore the impact on human system change of differences in power and privilege based on, for example, race, class, gender, sexual orientation, ethnicity, ability and age. The notion of structural impacts on people's ability to be appreciative is an important discussion to bring to appreciative inquiry. One area that has addressed these challenges is transformative education. In the next section I will continue to explore notions of transformation in the context of transformative education.

Transformative Education

...the educational process is one of continual reorganizing, reconstructing, transforming. (Dewey, 1916, p. 50)

In the first section of this chapter I discussed appreciative inquiry and processes because they are important approaches to human system transformation, enhancing people's ability to be present with and to see the authentic nature of one another, key elements in 'making magic.' In this section I continue to explore transformation by exploring transformative education literature. Facilitators of collaborative processes educate by creating spaces for the possibility of transformation, magic, to happen. They are educators who work with human systems, groups of individuals, to lead them toward a better life through individual and group transformative learning.

The notion of education as transformation is not a new one as indicated in the quote at the beginning of this section from Dewey (1916). In this section I locate transformative education in notions of transformative learning, culture, spirituality, and presence.

Transformative Learning

Transformative learning literature, through its critical lens, adds to the appreciative inquiry literature an analysis of social structures such as gender, race, class, and sexual orientation. The term transformative learning originates with Mezirow (1991) and his notion of individual behaviour change as a result of a disorienting dilemma. Mezirow

(2003) describes transformative learning as "a uniquely adult form of metacognitive reasoning" (Mezirow, 2003, p. 58). He discusses transformative learning in the context of adult education, and the desire of adult educators to create opportunities for their learners to understand the meaning of their experiences and knowledge, as located in particular contexts and through holding particular assumptions. "Transformative learning is learning that transforms problematic frames of reference – sets of fixed assumptions and expectations (habits of mind, meaning perspectives, mindsets) – to make them more inclusive, discriminating, open, reflective, and emotionally able to change" (pp. 58 - 59). From the perspective of transformative learning, the role of the adult educator is to create spaces where learners can critically reflect and, as a result, shift epistemologically how they know what they know, from the "socialized to the self-authoring mind" (Kegan, 2000, p. 65). Mezirow (2003) defines the adult educator role "both as a facilitator of reasoning in a learning situation and a cultural activist fostering the social, economic, and political conditions required for fuller, freer participation in critical reflection and discourse by all adults in a democratic society" (p. 63).

In order to create spaces for this kind of critical reflection and discourse, educators need to consider the element of power differences. No matter how collaborative the process, there will be power differentials based on the different roles, abilities, backgrounds of the facilitators and participants. Mezirow (2000) suggests that adult educators shift authority, as soon as possible, to the group. He emphasizes the importance of collaborative learning. Brookfield (2000) also addresses notions of power saying, "the first important focus of critical reflection is on the uncovering of submerged power dynamics and

relationships…the second purpose of critical reflection is to uncover hegemonic assumptions" (p. 137); he also emphasizes the importance of collaboration saying, "critical reflection must be a collaborative project" (p. 146). Facilitating transformative learning requires articulating the notion that we all bring into any dialogue our own biases, values and world-views. Facilitators need to make transparent this notion by articulating and reflecting on their own.

Belenky and Stanton (2000) suggest that Mezirow, in focusing on the endpoint, "does not trace the many steps people take before they can 'know what they know' in the highly elaborated form he describes" (p. 72). They emphasize the developmental process of knowing and present the epistemological framework from *Women's Ways of Knowing* (Belenky, Clinchy, Goldberger & Tarule, 1986) which outlines five kinds of knowledge: silence, received, subjective, procedural (separate and connected), and constructed. Facilitators need to be aware that learners who are at different epistemological stages will participate in different ways. In the stage of silence, learners have no voice. In the learning context they do not think that they know anything. In the received knowledge stage the learner looks totally to the teacher for the answers, whereas, in the subjective knowledge stage, the learner looks only to their own experience for knowledge. Procedural knowledge, the stage when the learner has developed learning strategies, includes separate knowing and connected knowing. Separate knowing is playing the doubting game, finding weaknesses in other views and engaging in critical discourse. Belenky and Stanton (2000) suggest Mezirow's approach to critical discourse is separate knowing. Connected knowing, in contrast, is playing the believing game, finding

strengths in other views, and being empathic, similar to the epistemological framework for appreciative inquiry, with its focus on the positive. Ideally the mature adult learner is able to construct knowledge, the fifth stage, through appropriate use of separate and connected procedures in response to the learning context. Facilitating collaborative processes requires attention to both separate and connected procedures and to the variety of participant epistemological stages. Belenky et al.'s framework has been critiqued from a post-structural feminist pedagogical point of view (Tisdell, 1998). For example, silence may not mean lack of voice or knowledge, "especially for those cultural groups that have an appreciation of silence that white Western cultures lack" (p. 144).

As well as being at different epistemological stages, participants will have other kinds of individual differences. Cranton (2000) explores the notion of differences in personality styles in transformative learning. She suggests ways adult educators can encourage "individuation, the development of the person as separate from the collective which in turn allows for the person to join with others in a more authentic union" (p. 189). Some of these ways include having participants gain awareness of differences through personality style inventories, paired journals, and exercises to identify differences. She suggests the educator also be aware of her or his own personality style. In my own practice, depending on the context, I use inventories as a way for participants to see that they have different styles and that these can affect their learning and communicating. For example, I have used communication style inventories with teams where people were having interpersonal conflict. Those in conflict were surprised to find out about the differences in styles and discovered that much of what they had thought was bad

behaviour on another's part was just a different communication style. This allowed for transformative learning, a shift in attitude toward their team members.

It is important for facilitators of collaborative processes to recognize that group members bring a diversity of learning styles (Kolb, 1984, Kolb & Boyatzis, 2001) and personality styles (Kiersey & Bates, 1984) that affect the collaborative process. As well, it is important for the facilitators to identify and reflect on their own styles and how that might impact their facilitating. Cultural differences also impact learning and facilitating and I explore these in the next section.

Culture

Beyond the internal dimensions of human beings, such as ways of knowing, personality and learning styles that impact transformative learning, O'Sullivan (1999) recognizes the cultural and socially constructed dimensions and the resulting privilege/oppression associated with these. In writing about transformative education he takes a critical stance; in particular, he is critical of globalization and Western dominance. He acknowledges, in his analysis, his own location of privilege as white, Western, male and middle class. This is powerful because people with these kinds of unearned privileges, as McIntosh (1988) argues, often do not see their privilege. McIntosh describes her own journey to recognizing her white privilege through her work as an educator in women's studies to reveal men's privilege. She describes white privilege as "an invisible package of

unearned assets that I can count on cashing in each day, but about which I was 'meant' to remain oblivious" (p. 73).

Reading McIntosh was a transformative learning experience for me. Her description of white privilege and other examples of unearned privilege allowed me to see and articulate some of my own privileges such as being white, middle class, and able-bodied. These privileges all impact who I am as I facilitate, and my relationship with participants. Differences in privilege are part of the structure of society and create structural oppression. As Young (1990) argues, "the disadvantage and injustice some people suffer [are] not because a tyrannical power coerces them but because of the everyday practices of a well-intentioned liberal society" (p. 41). Young says social justice "requires not the melting away of differences, but institutions that promote reproduction of and respect for group differences without oppression" (p. 47). This notion of social justice requires transformative learning within these institutions to create these changes. A critical appreciative process could be the means towards this transformation. The critical element of the process could be recognizing the oppressive structures, and the appreciative element of the process could be the means for dialogue to transform those structures.

As well as reflecting upon their own privilege(s) and oppression(s) and the impact of these on facilitating, it is important for facilitators to recognize the impact of privilege and oppression on participants' ability to be appreciative and to feel valued themselves. As well, facilitators need to pay attention to the impact on others of biases and stereotypes that they and their participants may have. Examples of this happen often in

my instructional skills classes, where learners are presenting mini-lessons and make broad statements that exclude members of the group such as, "you all have wives" and "when you prepare your Christmas dinner." These statements provide great opportunities in the feedback and debrief sessions to dig into the notion that we all have biases and assumptions based on our variety of cultural differences, and it is very important to reflect on these in order to create magical spaces that are inclusive for our learners. Using appreciative processes can help facilitators create spaces where participants feel respected and valued for their differences.

Tisdell (2003) also explores the cultural dimensions of transformative education. She defines culture as "a specific group with a shared set of values, beliefs, behaviors, and language" (p. 37), and dominant culture in North America as those "who are white, of European ancestry, moneyed, of Christian background, heterosexual, able-bodied and often male as well" (p. 37). People in the dominant culture are privileged. The complexity of intersections of culture has a huge impact on how people treat one another and interact together in groups. Similar to McIntosh (1988), Tisdell suggests that the norms of the dominant culture are often invisible because they are dominant. In multicultural contexts it is often easier to see non-dominant cultural characteristics because they appear different from the dominant culture. Tisdell compares dominant culture privilege to fish swimming in water and not being able to see the water. In my practice, I have been lucky to have many experiences where I have had my notions of the norms challenged by being part of groups where our behaviours and attitudes had to change in order to work together. One example of this was my experience being part of

an administrative team where the chair was blind. When we first began meeting we were stuck in old habits of raising hands to vote and leaning forward to be recognized to speak. We soon had to shift our assumptions and use our voices, indicating who wanted to speak and who was voting for or against a motion, and we designated another person to keep a speakers list.

Much of my work involves groups of mixed race, ability, gender, socio-economic status and I have many stories of my own transformative learning in relation to these. Tisdell (2003) tells a story that she describes as her "single most transformative moment" (p.222) in a master's level education class, and a student group presentation on hooks' (1994) 'engaged pedagogy' which concluded with comments from everyone on how the presentation had affected them. Like many of my diversity classes this situation was very emotional and people shared at a very deep level about their understandings of how systems of privilege and oppression work.

Wlodkowski and Ginsberg's (1995) motivational framework for culturally responsive teaching is useful in planning and implementing spaces where cultural diversity is valued, where magic can happen. In Chapter Two, I refer to Wlodkowski and Ginsberg's notion of inclusive climate, a component of their framework, as I describe the application of their notions to the collaborative e-mail conversation. Their framework suggests conditions to enhance learners' intrinsic motivation to learn. Wlodkowski (1999b) contextualizes motivation and learning in the following passage:

> Motivation is the natural human capacity to direct energy in the pursuit of a goal, and learning is a naturally active and normally volitional process, but that process cannot be separated from the cultural context of the classroom or from the background of the learner. (p. 7)

Facilitators can create structures and provide opportunities for learning, but ultimately it is the learner who will be motivated, or not, to learn. Not all learners are motivated in the same way since "culture – that deeply learned mix of language, beliefs, values, and behaviors that pervades every aspect of our lives – significantly influences our motivation" (p. 7).

The framework of Wlodkowkski and Ginsberg (1995) framework represents four intersecting motivational conditions that teachers can create or enhance: establishing inclusion, developing attitude, enhancing meaning, and engendering competence. Inclusion is established when learners feel respected by and connected to one another. Positive attitudes to learning are developed when participants perceive learning to be personally relevant and they are given some choice in their learning. Meaning is enhanced when the learning experiences are engaging and challenging and include learners' perspectives and values. Competence is engendered when learners effectively learn something they value and perceive as authentic to their real world.

Wlodkowski (1999a) applies this motivational framework to adult learning and suggests teaching strategies to create these motivational conditions. He represents sixty strategies in a linear way through the four motivational conditions, but emphasizes that in the

learning environment these conditions are interacting in a circular and intersecting way. It is important for facilitators of group processes to reflect on these four conditions as they plan, engage in and reflect back on group sessions. The specific strategies provide useful facilitating/teaching tools for planning learning activities. Although this framework is designed for formal teaching/learning, these motivational conditions for learning can be translated to motivational conditions for any effective group learning.

I built my own framework for creating and nurturing learning teams based on synthesizing Wlodkowski and Ginsberg's (1995) four motivational conditions for learning into three components for effective teams: an inclusive learning climate, meaningful activities, and reflective assessment. The first component in my framework, an inclusive learning climate, is created when all team members connect to one another and respect the diversity of backgrounds, abilities, skills, values and knowledge of the members of the team. When I work with teams to create an inclusive learning climate, I articulate the notions of bias, power and privilege in order to create a space where all people can be recognized in their complexities of differences and similarities for who they are.

The second component of my framework, meaningful activities, includes meaningful team roles and responsibilities that engage each member of the team, are relevant and challenging to each individual as well as the team and use the best of each member's abilities. People are more likely to become present with each other when their work is meaningful and they feel like they are contributing to the team.

The third component of my framework, reflective assessment, includes the skills of both self-assessment and giving/receiving feedback to/from others within the team in order to determine both individual and team effectiveness. These motivational components for learning provide a framework for effective groups; groups that work in a collaborative way and in which individual members are present. The facilitator's responsibility is to pay attention to each part of the framework, designing strategies to allow for group success. This attention is an important component of 'making magic,' being intentional in creating structures that will enhance the human connections and transformative learning.

Many of these educators who write about the impact of culture on transformative learning also write about the spiritual dimensions. I present some of these and others who write about spirituality and education in the next section.

Spirituality and Education

In this section I have selected authors whose notions of spirituality and education are relevant to this inquiry, to the notions of 'making magic.' I begin with O'Sullivan (1999) who believes "that any in depth treatment of 'transformative education' must address the topic of spirituality and that educators must take on the concerns of the development of the spirit at the most fundamental level" (p. 259). O'Sullivan refers to spirituality as "the deeper resources of the human spirit and involves the non-physical, immaterial dimensions of our being; the energies, essences and part of us that existed before and will

exist after the disintegration of the body" (p. 259). The notion of energy is also found in the literature on magic. Crowley (2003), a psychologist, management consultant and Wiccan priestess, links magic to life force or sacred power. She says, "natural magic is a skill, a way of using energy" (p. 8).

Along with culture, Tisdell (2003) explores spirituality in adult and higher education. Tisdell defines spirituality as meaning-making through interconnectedness with other humans. She says that, "spirituality is always present (though often unacknowledged) in the learning environment…and is how people construct knowledge through largely unconscious and symbolic processes…[it] often happens by surprise" (p. 29). Tisdell recommends the following elements of a spiritually grounded and culturally relevant pedagogy for the possibility of transformative learning:

1. an emphasis on authenticity (both spiritual and cultural)

2. an environment that allows for the exploration of:

   - the cognitive (through readings and discussion of ideas)

   - the affective and relational (through connection with other people and connection of ideas to life experience)

   - the symbolic (through art forms such as poetry, visual art, music, drama)

3. readings that reflect the cultures of the members of the class, and the cultural pluralism of the geographical area relevant to the course content

4. exploration of individual and communal dimensions of cultural and other dimensions of identity

5. collaborative work that envisions and presents manifestations of multiple dimensions of learning and strategies for change

6. celebration of learning and provision for closure to the course

7. recognition of the limitations of the higher education classroom and that transformation is an ongoing process that takes time. (pp. 212 - 213)

In the appreciative inquiry section I described how English, Fenwick and Parsons (2003b) applied appreciative inquiry to spirituality in adult education. These authors argue for adult educators to focus on spirituality. Similarly to Tisdell (2003), English et al. define spirituality as the human search for meaning through interconnections with others and "believe there is room for a spiritual literacy" (p. 142) as well language literacy, numeracy and cultural literacy. They argue, "that the fields of adult education and training need to recover some of their early concerns for holistic, spiritually informed, and socially responsible practice" (p. vii). They suggest that educators should create sacred spaces for learning where learners are respected and included, in dialogue with each other.

They suggest ways for facilitators to create sacred spaces that allow for spiritual literacy in their work and for them to keep in touch with their own spirituality. English et al. (2003b) suggest that facilitators should practice mindfulness that they describe as being present fully in each moment. To do this facilitators need to take care of themselves, "care of the body is an integral dimension of an adult educator's or trainer's spirituality" (p. 57). English et al. (2003b) use the example of the labyrinth as a tool to "relax the

mind and the body, to let go, and to allow the spirit to enter. It is also a reminder that the mind, body, and soul are one" (p. 59).

In his book on labyrinths, Lonegren (2001) describes labyrinths as "magical single-path mazes" (p. 19) which have been used by many cultures for many centuries as sacred spaces "where one can go to get help in contacting non-physical realms. These can be places of emotion, intuition, and the spirit" (p. 13). Labyrinths may be painted on a floor, constructed as a path in a forest, constructed in the stone floor of a church; wherever they are found they are places for walking meditation. Walking the labyrinth is very simple: participants walk, following a single path that curves and winds into a centre where they pause to reflect and then walk back in reverse along the same path to exit the labyrinth. Compton (2002), another educator writing about transformative learning, speaks about her own journey to using the labyrinth as a transformative learning tool.

The labyrinth has been a tool for my own transformative learning and in my practice I have co-designed and co-facilitated a workshop called, *The Labyrinth and the Art of Leadership*. This workshop offers leaders a sacred space, through walking the labyrinth, to reflect on leadership and to participate in dialogue with other leaders. It is an opportunity for the possibility of transformative learning. The following is an example of my own learning, something I wrote after a labyrinth walk in response to prompts from an inquiry into the inner life of leaders (McArthur-Blair, 2004).

Today as I walked the labyrinth I realized that I could say I believe in God, if God is the essence or spirit within all of us. God is what connects us all. God is love. God is the energy that we can leash when we need it just by calling for it. God is not something we can see, neither is magic. I know that if I let go of negative energy and focus on the

positive, expecting the best, then wonderful things happen. Sometimes what happens is not what I had envisioned but it always seems to be what I need, what fits. I think this is what happens when I facilitate. I stop and listen and know that God will intervene. The God that allows us to hear one another. When I am facilitating well, making magic, and the enchantment is there, God is there, God the energy that connects us all. There is love, people feel safe and cared for…(Jeanie, journal, May 24, 2003)

This piece of writing from my journal illustrates the power of a sacred space such as the labyrinth for learning, in this case, my own learning about 'making magic.'

Tisdell and Tolliver (2003) also use the term sacred space. At the end of their article, they each separately illustrate the notion of sacred space from their own practices. Tolliver describes her intent to provide a sacred space:

> where learners' more authentic selves (culturally, spiritually, and on other levels) can show up and be honoured; where they can learn, share, and grow through various ways of knowing in connection with others; where it is safe to not know and to ask questions; and where they can find their own harmony and rhythm and then dance (because fun is so important to learning!). (p. 386)

Tolliver goes on to describe a variety of ways that she creates the sacred learning space, most importantly by being who she is herself, "I celebrate who I am spiritually and culturally and invite others to celebrate themselves" (p. 386). She describes a variety of 'spiritual technologies' that allow for creativity and imagination through celebration and ritual. Food, decorations, African proverbs, centring exercises, candles and a variety of approaches to instructions are some of the tools that she uses to increase the energy and connections among the learners. Tisdell, in the same article, describes a variety of activities that she uses to create a sacred space for learning. For example, she begins "each class with a brief check-in of joys and difficulties that have been a part of the

learning lives they have had since the last time we met" (p. 388). She goes on to say that this activity "is an attempt to create a learning community that honors the life experiences of the learners" (p. 388). Collaborative learning activities play an important part in her classrooms. As does Tolliver, Tisdell builds ritual into her learning spaces. Tisdell and Tolliver conclude with the following statement that acknowledges the limitations as well as the possibilities for transformative education:

> By helping learners engage on the personal, cultural, structural, political and artistic/spiritual levels, we believe there is greater chance that education is transformative both personally and collectively, for both learners and educators, although there are always limits to the extent that an educational experience can be transformative either individually or societally. (p. 389)

The sacred spaces described above are places where facilitators and learners become present with each other. In the next section I explore further this notion of presence that is a key element of magic.

<div align="center">***Presence***</div>

Kessler's (2000) term soul resonates as a good description of the kind of presence that happens when there is magic:

> When soul enters the classroom masks drop away. Students dare to share the joy and talents they have feared would provoke jealousy in even their best friends. They risk exposing the pain or shame that peers might judge as weakness. Seeing

deeply into the perspective of others, accepting what has felt unworthy in

themselves, students discover compassion and begin to learn about forgiveness.

(p. x)

Kessler talks about some of the gateways to bringing soul into education and illustrates

these with powerful stories of teaching high school, stories of how she strives to bring

soul into educational experiences. Some of these gateways arose as themes in this inquiry

into 'making magic.' These themes are connection, silence, meaning, joy and creativity.

Kessler describes some practices that are crucial to inviting soul into the classroom. Some

of these are similar to my own practices for inviting magic into a collaborative process.

One of these practices is the collaborative development of ground rules. In this inquiry I

illustrate this practice with the agreements (ground rules) process I used with the co-

researchers at the beginning of our collaborative e-mail conversation (see Chapter Two,

Stage Two: Collaborative Conversation). All of the co-researchers referred to using some

kind of ground rule process in their facilitating practice.

Another of Kessler's (2000) practices is the use of games and symbolic expression. Some

examples of this in my practice are icebreaker activities, team games, and the use of

pictures to generate metaphors. I use the symbol of a magic wand to bring fun, laughter,

and attention into the group. I use it to move from small group activities back to large

group debriefing and to pass from person to person to indicate who has the floor when

speaking. In a similar way Kessler has her students pass a stone around in another of her

practices, the council process. The person with the stone, or in my case the wand, has the

right to speak without interruption while the rest of the group deeply listens.

There are other places this kind of practice is found, in First Nations traditions, for example, as Graveline (1998) describes:

> The basic rules of Talking Circle are: one speaker at a time, the person holding the special object is the speaker and all others are to listen respectfully to that person. In Talking Circle you speak your own voice, describe what your own experience has been. You have the opportunity to express what you feel is on your heart to say. The point is to speak 'from your heart,' of what moves you, of what spirit moves through you when the sacred object reaches your hands (p. 139).

Baldwin's (1998) circle process is another example of this kind of deep listening process that uses circle, ground rules and passing an object of some sort to indicate who has the right to speak. In our doctoral cohort, we use a circle process in our informal get-togethers, reading/writing/research circles and in our last formal class together, the doctoral seminar leading into our comprehensive exams. Before our comprehensive exams we had a circle to touch in before we began and before our examiners arrived. We were honoured to have one of our examiners lead us all in a circle prayer before beginning. At the end of the two-day process we finished with a final cohort circle. The circle process has been an essential ingredient in our cohort development. It is a magical group.

Palmer (1998) describes a similar process, the Quaker structure called the 'clearness committee' (p. 152) which honours the paradoxical Quaker beliefs: "each of us has an inner teacher that is an arbiter of truth, and each of us needs the give-and-take of community in order to hear that inner teacher speak" (p. 152). The 'clearness committee' meets to help an individual understand a problem. The individual with the problem presents the problem to the committee. The rest of the committee listens deeply and responds with non-judgemental questions, questions that elicit internal learning from the individual with the problem. No advice is given.

Palmer (1998) says that, "good teaching cannot be reduced to technique; good teaching comes from the identity and integrity of the teacher" (p. 10). Like Palmer's good teaching, good facilitating cannot be reduced to technique alone, although technique is an important component. More importantly, good facilitating comes from who we are as facilitators, our identity, integrity and authenticity. We can learn techniques but without being authentic in who we are, the facilitation is mechanical and without the energy and life that creates the magic, the enchantment or spirit. Being authentic in our own identity and integrity is being present, and being present guides us to appropriate techniques. This is one of the paradoxes that Palmer (1998) says exist in teaching, "good teaching comes from identity, not technique, but if I allow my identity to guide me toward an integral technique, that technique can help me express my identity more fully" (p. 63). This inquiry, by its narrative nature, goes beyond the techniques. Through the stories it allows the reader to glimpse at the magic, not just as a result of techniques and tools, although

these are important components. The stories illustrate magical facilitators who bring their own presence to their groups in order for their participants to be present themselves.

Palmer (1998) shares his own stories of teaching to illustrate the 'inner life' of teaching, including the courage it takes to have integrity, to be true to oneself as one teaches, to be present, who we are as teachers. Palmer says, "'Who is the self that teaches?' is the question at the heart of this book – though answering that question in print has been more challenging than I imagined" (p. 7). Palmer inspires me to delve into the meaning of 'making magic' by telling my own stories, listening to those of other facilitators and exploring the themes embedded in those stories. His book, *The Courage to Teach,* is one that I carry with me to sessions where I am teaching teachers, adult educators, trainers, leaders, instructors, professors, and facilitators. I hope my participants will read it to inspire them to reflect on who they are as they teach, to reflect on their own stories and to practice being present when they teach.

Palmer (1998) says "good teachers possess a capacity for connectedness…the connections made by good teachers are held not in their methods but in their hearts – meaning heart in its ancient sense, as the place where intellect and emotion and spirit and will converge in the human self" (p. 11). Connections are important to the magic that happens in a collaborative process. In their work on creating community in online classrooms, Palloff and Pratt (1999, 2001) describe the importance of connection in groups, "we find the power of groups, whether face-to-face or electronic, intensely spiritual…the connection between people, however that may happen, touches the spiritual

core" (1999, p. 42). In this inquiry the e-mail introductions process in Chapter Two illustrates one of the ways the co-researchers began to make connections and to become present with each in order to create their interconnected reality, a web, through the collaborative conversation.

Jardine (1998) tells a story about observing a teacher who appeared disconnected from the children she was teaching. In discussing this with her, he found that she wanted to reduce the discussion to techniques of eye contact and smiling rather than reflecting on being genuine and engaged with the children. Jardine says, "matters such as genuineness, care, love, patience, integrity, trust, listening, attunement, a respect for the deep difference of children…lie at the heart of living our lives with children even though such matters are difficult, ambiguous, and risk-laden…" (p. 6). These are also qualities of the connections needed to 'make magic,' facilitating adult collaborative learning processes.

According to Palmer (1998), in the Western world we live in a culture of disconnection because we think so much in polarities, ideas that are linked by either-or. He suggests that we join opposites, creating paradoxes where opposites stand together not as 'either-or' statements but as 'both-and' such as the safety and risk that we co-researchers describe in facilitating magic. Paradoxes are held together in creative tension. It is the ability to be aware and work within these paradoxes that allows facilitators to create spaces for magic to happen. I use the term space as Palmer does:

> by space I mean a complex set of factors: the physical arrangement and feeling of
> the room, the conceptual framework that I build around the topic my students and

I are exploring, the emotional ethos I hope to facilitate, and the ground rules that

will guide our inquiry. (p. 73)

This conception of space is holistic, clearly including the physical, intellectual, emotional

and not so clearly the spiritual. Palmer's (1998) notion of guiding ground rules may be a

way that the space interconnects peoples spiritually as authentic, interconnected beings.

Some of the ground rules that normally arise in my facilitating experiences include the

paradoxical tension between those of safety - respect, listening, and confidentiality, and

those of risk - honesty, speaking one's mind, participating fully, and constructive critique.

Interpersonal risk can only happen when people feel safe enough to express themselves

honestly and fully, to be authentic with each other and interconnect at a profound level.

hooks (1994, 2003) captures the holistic notion of facilitator presence. She describes

'engaged pedagogy' (2003) as progressive holistic education that emphasizes well-being.

This emphasis on well-being is similar to the focus on student success stories described

previously in appreciative pedagogy. In order to engage students, teachers "must be

totally present in the moment, totally concentrated and focused" (hooks, 2003, p. 14) and

"must practice being vulnerable in the classroom, being wholly present in mind, body,

and spirit" (hooks, 1994, p. 21). hooks shares her own stories to illustrate the challenges

within structures that are so often focused on the separation of the mind from body and

soul, "as a black woman, I have always been acutely aware of the presence of my body in

those settings that, in fact, invite us to invest so deeply in a mind/body split…" (hooks,

1994, p. 135). Her stories are powerful illustrations of her application of concepts to her

classroom. She locates her theory in Freire's (1970) notion of 'conscientization' in the

classroom. "Translating that term to critical awareness and engagement, I entered the

classrooms with the conviction that it was crucial for me and every other student to be an active participant" (hooks, 1994, p. 14). For Freire (1970) active participation by learners is "praxis: reflection and action upon the world in order to transform it" (p. 36). It is important for facilitators to model their own praxis as they engage with participants to reflect and act on their worlds. In her book on love, hooks (2000) explores the emotional aspect of the work educators do. She says, "we engage in loving practice. That love lays the foundation for the constructive building of community with strangers" (p. 144). I will explore the notion of love more as it arises from the data in the next chapter.

In summary, the transformative education literature provides important threads for this inquiry through examination of transformative learning, culture, spirituality and presence. The notion of transformative learning is about a shift in attitude and habits of mind to become critically reflective of one's own epistemological framework, personality/learning/communication styles. Facilitators of magic need to be critically reflective of their own habits of mind and styles as well as aware of the impact of their participants' diversity of styles. As well, facilitators need to reflect on and respond to the impact of culture, the social constructions, such as race, class, gender and the complex combinations of these, on the possibility of transformation and learning. These differences impact people's ability to be appreciative, to be present, and to connect to one another. Culturally responsive facilitators create spaces that are inclusive of differences. To do so, many educators are arguing for a more holistic view of teaching and learning, where sacred spaces are created that take into consideration the spirit and emotions as well as the intellect and body. These spaces invite people to become present with each

other. This begins with facilitator presence. In order to be present facilitators need to take care of themselves and find their own spiritual tools for doing so.

In this chapter, I have explored notions that are key to 'making magic' through the lenses of appreciative inquiry and transformative education. Appreciative inquiry provides a framework for magic. People are more likely to be present when they are appreciated first. Transformative education provides ways to do this that acknowledge differences, both individual and structural, and that include the spiritual and emotional dimensions of presence.

This study contributes the notion of critical appreciative processes to both the literature of appreciative inquiry and transformative education. The critical element of these processes is recognizing and challenging oppressive societal structures, and the appreciative element of these processes is the means for dialogue to transform those structures.

In the next chapter, I explore further the meaning of 'making magic' by presenting the data from the inquiry, the stories and the themes that the co-researchers shared. In this chapter I wove illustrations from my own practice into the literature. In the next two chapters I weave literature into the data from the co-researchers' practices.

CHAPTER FOUR: BEING PRESENT

Facilitating collaborative processes is working with groups, learning groups or workplace groups, to purposefully guide them towards, and to make it easy for them to achieve their intended outcomes. These outcomes may include a plan, re-organization, individual learning, group learning and/or strategies for getting along better. Along with the intended outcomes may come unintended outcomes such as better working relationships, understanding of the root causes of problems, or alternate outcomes revealed through the process.

When the magic happens in this collaborative process the group becomes more than the individuals put together and/or the group process aggrandizes the learning. The group becomes an interconnected whole. Magic is this transformation, the alchemy that happens when the people in the group are interconnected and authentic with each other. (Appendix D, Revised Brief Synthesis of Making Magic)

The quote above is the synthesis of the co-researchers' answers to the interview question, "What is the meaning of 'making magic,' facilitating collaborative processes?" In this chapter and in Chapter Five, I continue to dig into the meaning and value of 'making magic,' facilitating collaborative processes, by representing and analyzing the data, snippets and themes, from Stage One: Interviews and Stage Two: Collaborative Conversation. This chapter illustrates magic through the overarching theme of being present, being who we are as we facilitate and inviting our participants to be present as well. In Chapter Five, the snippets illustrate some of the challenges in striving for magic, our vulnerability and courage as facilitators. In both chapters, as in any appreciative inquiry, I chose these particular snippets because they had the most energy and, therefore, were the most illustrative of themes informing the meaning and value of 'making magic.' I sew together snippets, analyzing them for themes and facilitation strategies, that illustrate, for this group of facilitators, both who we are and what we do as we strive to

'make magic.' At times I weave in notions from relevant literature and examples from my own practice. The snippets, as are our practices, are located in a variety of different contexts, post-secondary education classrooms and departments, conferences, community organizations, corporations, and businesses. The nature of the facilitating varies as well and includes formal teaching, workshop facilitating, and facilitating organizational development (planning, team building, conflict resolution, change).

In this chapter, the overarching theme of being present is illustrated with eleven snippets, themes arising from the snippets, further examples, quotes from the data, and relevant literature. The snippets are linked by key themes, many of which re-occur throughout. The themes and stories, like magic, are complex and interconnected. There is no simple magic formula. At the end of the chapter I summarize the major themes. As in the quote above from the Revised Brief Synthesis of Making Magic, magic is the transformation that happens through authentic human interconnection. The alchemy that happens creates a sense of enchantment that indicates that magic has happened.

To begin the storytelling that illustrates the meaning and value of 'making magic,' I return to one of the snippets from Chapter One, Magical Snippets, a peak experience story from my interview. I told this story in answer to, "tell me a story of one of your experiences 'making magic.'" I begin with this snippet and spend more time with its analysis than with the ones following. I do this to further locate this inquiry autobiographically. I weave the autobiographical thread throughout the analysis of the other co-researchers' snippets.

Sharing My Inner Life (Jeanie, interview)

My mom was dying when I started teaching my first course at UBC. After struggling with whether I should teach or stay with my mom, I decided to teach the class. I funnelled all my energy in order to do the things I do in a first class to establish a climate for magic – getting to know each other, establishing our guidelines for working together, hearing their expectations, clarifying course requirements and structure. I was high energy and lots of fun. People went away eager to return. I said nothing about my mom. The second class was a week later and, meanwhile, my mom had died. I felt like a truck had run over me and I couldn't imagine how I would teach this second class. There was no reserve in me. I was in tears driving out to the campus. Within moments of the beginning of class I knew that I had to share what was happening in my personal life to be authentic in facilitating this class. So I told them about my mom dying and how that might affect how I would be in class, connecting my story to the content of this class on teaching perspectives. Sharing my inner, private self was very powerful. The students were moved and we were able to continue on. It was a magical class all the way through to the end of the term.

This snippet illustrates the balance in facilitating, 'making magic,' of who we are as facilitators with what we do or how we do it, the balance of our presence and our techniques, similar to Palmer's (1998) paradox of identity and technique. In this story I refer briefly to some of the techniques or structures that I use in a first class to create an inclusive climate (Wlodkowski & Ginsberg, 1995) where learners feel respected and connected to each other. This story illustrates the forming stage of group development (Tuckman, 1965; MacIver, 2002) where the group is unsure of what to expect of the facilitator and other group members. Techniques used here begin the development of group norms. The facilitator lays out the framework of the task, in this case the course outline, asks for their expectations and works with the group to develop group norms and build on their expectations. These techniques also allow the participants to begin to be present. The major theme in my story is the notion of my authenticity as the facilitator,

my own presence or identity. Being authentic is being who one is. In this situation I demonstrate my presence by revealing to my learners emotions located in my personal life, my grief over my mom's death. Paradoxically, I was also demonstrating my deep love for my mother. In this class I told them the story of the very profound conversation I had with my mom the week before she died. In that conversation, as I cried by her bedside, I told her that I loved her and would miss her. In response, my mom comforted me by telling me about her mother dying. She told me that she never forgot her mother and always loved her. In her own way, my mom was helping me through this time of grief. Later several of my students told me how much this story moved them. One international student from China wrote me an email that night expressing her thanks for my sharing and shared a story of her own with me.

Through revealing my inner life this way, I hoped that my class would see a fundamental part of who I am, my caring nature. This nature is fundamental to who I am as a teacher and my teaching perspective. This was most appropriate in this case because it was a course called *Teaching Adults*, and was based on Pratt's (1998) five teaching perspectives in adult education. According to Pratt, teachers teach through a teaching perspective based on their beliefs and intentions that inform their actions. In a large international research study, Pratt found the following five teaching perspectives, each with a corresponding belief about what teaching is:

1. Transmission - effective delivery of content

2. Apprenticeship – modelling ways of being

3. Developmental – cultivating ways of thinking

4. Nurturing – facilitating self-efficacy

5. Social reform – seeking a better society (p. xiii)

Similar teaching techniques may be used within the different perspectives but the beliefs and intentions behind the techniques vary according to the teaching perspective. In other words, a teaching perspective is about the identity or the 'who' one is as teacher, not the techniques. It is important in 'making magic' to reflect on one's teaching perspective and to make it apparent to learners in order to be fully present.

In the language of Pratt's (1998) teaching perspectives I teach predominantly as a facilitator and a guide, through the nurturing and developmental perspectives. In my teaching practice my primary concern is to create a safe place for the learners so they can grow and be empowered (nurturing perspective) and to find out what they already know in order to build on their previous knowledge (developmental). I also teach through articulating my ideals of social justice (social reform); through role modelling (apprenticeship) when I am teaching about teaching; and through, as expert, effectively presenting the content (transmission). All the perspectives have value and it is important that we teach from our own, making clear what we believe in as teachers. In this class I wanted them to see clearly my own teaching perspective based on caring for them as individual learners, nurturing, and they did see that and told me so.

But caring in and of itself is not enough to 'make magic.' Caring, by tapping into the emotional dimension, allows a shift to the deeper interpersonal connections so important for transformative learning, but caring must be balanced with clear, logical,

informational, and engaging teaching. Throughout the term I continued to demonstrate my caring, all the while balancing that with the intellectual challenges of solid course content and learner evaluation. I created a space where the possibility of transformative learning could happen. As Mezirow (2000) suggests, I shifted authority to the learners in a variety of ways. They worked in a variety of combinations of collaborative groups throughout the course and, in particular, for one of their assignments they did collaborative group research and a presentation of the results. Although I was the final evaluator, they shared a small part of the responsibility for evaluating. Part of the group presentation mark was based on their own and the other groups' evaluations of the effectiveness of their presentation.

I intentionally designed course structures and activities to engage the learners physically, emotionally and intellectually. The physical space was a classroom that allowed for clustering of tables so students could interact and engage with each other during collaborative processes. An example of a physical activity that also engages people intellectually and emotionally is a values clarification exercise, which I used in this class as a way to lead into the class discussion of epistemic, normative and procedural beliefs (Pratt, 1998). I use it in other classes and team building workshops to help participants understand the differences in values and beliefs that people hold. First, I mark off the floor with two intersecting lines of masking tape to create four quadrants. In each quadrant a card is placed, each with one of the following labels: true, false, mostly true, mostly false. Then I read off values statements, for example, 'I believe that all people are equal,' and ask the participants to stand in the quadrant which best reflects their view of

the statement. Participants may choose to present their rationales for standing where they are and may try to persuade people in other quadrants to join them. After doing several of the statements, I debrief the exercise by leading a discussion where we notice the differences, both in values and in interpretation of the language of the statement. This exercise can provide a first step in transformative learning, the start of a shift in a frame of reference. The physical nature of the exercise, walking and standing, engages the whole body. The positioning forces everyone to take a stand. They engage intellectually with the concepts, unpacking the meaning of the statements. Often people standing in opposite quadrants in the discussion that follows realize that their beliefs are the same but their interpretations of the language in the statement are different. People can get quite engaged emotionally with this exercise as well. It requires careful facilitation and debriefing.

Well facilitated exercises such as this one can create a space for participants to be present with each other, to be themselves through discussing their values and beliefs and engaging in holistic learning – physical, intellectual, emotional and spiritual. I use the notion spiritual in the same way others do, as making meaning with others through human interconnections (English et al., 2003a, 2003b; Tisdell, 2003; Tisdell & Tolliver, 2003) and as our energies and essences (O'Sullivan, 1999). The spiritual dimension of learning allows all participants to be present, to be who they are. Everyone is valued and included in the learning process. The energy is high and learning this way is fun.

I include this next snippet as another example of sharing the emotional self that is present

when we facilitate. Leslie told this story in the face-to-face conversation, the last part of

the co-researchers collaborative conversation.

Grief and Professionalism (Leslie, collaborative face-to-face conversation)

*I knew I was going to be late as I headed to my cross-cultural issues class after attending
the funeral for one of my son's friends. I was gone, I could not cry, I was beyond it. When
I got to my class they were waiting for me. I couldn't talk. I sat on my desk and started to
cry. I thought I had shot all my credibility, professionalism. I kept trying to talk but I
couldn't and after 15 to 20 minutes, a long time, I was finally able to say a little bit. We
hadn't set up agreements or anything. We were going raw here. They told stories of their
own places of grief and death, stories from students from all over the world. The respect
in the room was phenomenal. I did nothing except cry and turn it over to them and their
stories. I didn't even facilitate, they facilitated each other…truly a thing of beauty and
then at the end of the class when I was sufficiently composed I pulled it all together, an
amazing richness of cross-cultural stories.*

Leslie's experience with her cross-cultural class was similar to mine. We both knew we

had to share something with the class, disclosing a part of our inner selves. In both of our

cases we were not able to continue on without this sharing. In my case I was able to hold

off the tears in order to share and carry on, although my eyes were wet as I shared. In

Leslie's case she did not have much choice, not being able to speak and crying

uncontrollably. We both struggled inside ourselves with 'presentation of self' (Goffman,

1959), with whether we were appearing unprofessional. Our inner voices were saying a

teacher/facilitator must be in control of their emotions at all times, but in these situations

that was not possible. We took the risk to stay with and share our emotions and by doing

so, risked being seen as 'unprofessional.' I would argue that in doing so we were being

'professional' in that we were being fully present in our wholeness, bringing in the

emotional parts of ourselves. We were re-defining our notion of professionalism to include the expression of our emotions and struggles within ourselves.

Leslie's story also illustrates the power of stories as her students from different cultures shared their own grief and death stories, and through this facilitated their own cross-cultural learning. Like my class on teaching perspectives, learning through these stories of emotional experiences fit with Leslie's course topic, cross-cultural issues. Unlike my story where I refer to setting up structures, Leslie comments on the lack of structures, "*going raw*," because "*we hadn't set up agreements or anything.*" By these comments she illustrates how at times facilitators need to let go of control and the structures, allowing the students to facilitate the process and, at the end of the class, assuming the responsibility of facilitator again to pull it all together.

In another one of Leslie's stories about facilitating collaborative processes she illustrates the notion of students facilitating their learning processes. I include it here to illustrate the kind of structures that Leslie uses to empower her adult education students.

Extreme Andragogy[12] *(Leslie, interview)*

This is an example of facilitating collaborative processes, what I call extreme andragogy. I walk into the room on the first day of the course, state the title of the course, "Facilitating Adult Ed," do cursory introductions, very basic housekeeping things and then ask them 3 questions:
> 1. *what is it that you want to learn? I ask them to create a list in learning objective format…*

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[12] Andragogy is "the science and art of teaching adults" (Knowles, 1980).

2. *how do you want to learn? I give them some extremes to juice it up a bit – I could lecture the whole time. You could just read the book. You could do presentations…*
3. *how do you want to be evaluated so that the university gets a mark? I could give you multiple choice exams. You could write essays. You could do presentations. You could choose your mark. In which case we would have to determine the criteria…*

Once they are really clear on the task, I leave the room and I'm gone for about an hour or 2. I tell them where I am so they can find me if they need me and when they are done… it's phenomenal because they are already educators. They know what this is. They get empowered and break their own ice. The learning process just roars from then on. I have the lesson plans with me and sometimes I bring them out at the end of each day and show them, if I had been leading this, this is what we'd be doing, but often I'm writing up the new lesson plans at the end of each day. Deep learning happens because their motivation is so high. Different leaders pop up at different times and the group sustains, nurtures and grows itself. I'm apparently invisible and yet absolutely not. I'm absolutely present but not controlling, instead I am allowing, protecting, nurturing and providing boundaries if they need boundaries.

Leslie's story illustrates a facilitative approach to teaching, a nurturing perspective (Pratt, 1998). Viewing teaching as facilitating learning is a key component of andragogy (Knowles, 1980). As well, andragogy is built on the notion that adults are different kinds of learners than children, because they are more independent and self-directed and have more life experiences to bring to their learning. As adult educators 'making magic,' it is important to recognize these characteristics of adult learners. However, many adult educators who recognize and respond to these characteristics continue to use the term pedagogy as being inclusive of the art and science of teaching any aged learner. It is important to recognize the developmental needs of all learners, whatever stage of life they are at.

In this story, Leslie illustrates her facilitative approach by providing a space for learners' growth through the collaborative processes that they engage in. She nurtures their growth

and empowerment. Even more dramatically than in my story above about my adult education class, Leslie, as Mezirow (2000) suggests, through her extreme andragogy, shifts authority to the group as soon as possible.

This story also illustrates how a facilitator can be perceived as not doing anything, apparently invisible and yet, as Leslie says "*I'm absolutely present.*" Being present is not controlling but paying attention to the needs of the participants and responding to those needs, "*providing boundaries if they need boundaries,*" re-creating the agenda where necessary. This is a good example of the flexibility and responsiveness required in facilitating collaborative processes that allow for the possibility of transformative learning and magic.

This next story, also found in Chapter One, Magical Snippets, is an example of how emotions can help shift or transform a group. But, unlike the stories above that focussed on the facilitator sharing her emotions (*Sharing My Inner Life* and *Grief and Professionalism*), in this one Sandy, the facilitator, intentionally uses a structure to allow his participants to share emotions to transform the group.

Tears, hugs and CEOs (Sandy, interview)

I facilitated a Strategic Planning process for the organization I work with in Texas. We did something that was a key part of the process. We held a funeral. This is something I've done fairly rarely and only in exceptional circumstances. In this case it worked. I set up the room like a darkened funeral room lit by candles. When everyone was in the room and seated around a rectangular table with a glass full of water or something alcoholic, their choice, we went around and made toasts. To make it safe, as in every round robin that I conduct, you can always choose to pass. Everyone that chose to participate made a

toast to the old CEO and the old organization and then to the incoming CEO and the new organization. Some people kind of sloughed it off but most of the 20 plus people that we had in the room took it seriously. There were tears and there were hugs. The incoming chairman of the board who'd sometimes had difficult relationships with the outgoing chairman/CEO made a truly heartfelt statement after the thing was over. He was almost in tears talking about what he'd learned from him and how meaningful the relationship had been. In the end, it was really very dramatic and psychologically things changed in that room that night. The next morning, it was clear that the new CEO was now 'the' CEO in everyone's mind and heart.

Sandy, as the facilitator of the Strategic Planning process, intentionally decided to use a structure that he rarely uses but which, in this context of transition to new CEO, worked well. As Bridges (1991) suggests, it is important in the transition process to mark endings, to treat the past with respect before beginning any new change. Sandy's intentional use of the funeral structure is an example of marking an ending in order to move on to a new beginning. In his interview, Sandy talked about his intentions for using the funeral structure in the Strategic Planning process. He knew that there was a need to let go of the CEO who had headed up the organization for nine years, and to welcome the incoming new CEO. He discussed with the outgoing CEO the need for people in the organization to be psychologically prepared to let him go. The CEO agreed and, as Sandy said in his interview, "*was one of those wonderful people who wants the organization to become even better after he leaves.*" This structure allowed the participants to acknowledge their grief in the letting go of the past process through expressing emotions that up to that point had been left unsaid. The funeral structure and resulting emotions allowed the participants to be more present and authentic with each other through this organizational transition. Through this funeral process they "*discovered that some people hadn't psychologically let go of the previous leaders, who had established the company 50 years ago*" (Sandy, interview).

Like Palmer's (1998) paradoxes of space, Sandy's story illustrates the paradox of safety, "*you can always choose to pass*," and risk, expressing emotions through tears and hugs. The ongoing ground rules for safety underpin the drama and risk of the funeral. Not everyone is comfortable with this kind of emotional expression in the work environment or they may chose, for various reasons, to not participate, as Sandy said some "*sloughed it off*." Establishing ground rules with the participants and providing various kinds of opportunities to participate is important so that participants are respected for their differences.

Sandy's story also illustrates the power of ritual and symbolism to create spaces for potential transformation, in this case, a space where people could speak from the heart, to express gratitude and appreciation as they moved through a major transition in their company. Ritual and symbolism are powerful and important components of 'making magic.' My magic wand introduced at the beginning of this thesis is an example of a symbolic facilitator tool that I use as part of certain rituals. I use it to present the playful side of myself and to engage my participants in the fun. I use it to call discussion groups back to focus as a large group. With its bells and brightly coloured objects it acts as a sound and sight device. It rattles, jingles, glitters and shines. It is a great equalizing tool for participants with various types of physical ability. For example, in one of my diversity classes I had a blind student who could hear the sounds and a deaf student who could see the shaking objects as I waved the wand high above my head for all to respond to. Laughter, as well as tears, can often break up tension, helping individual and group

learning and allowing people to connect more fully to one another, to be present. Sandy, in his interview, also talked about the strategies he uses for participants to have fun and how important that is to their learning and problem solving. In my case, the wand not only adds to the fun, but acts in a more ritualistic way as a talking stick, being passed around to identify who has the right to speak without interruption. I want to distinguish this use as a talking stick from the First Nations' use of a Talking Stick, a sacred object as described by Graveline (1998), which has complex cultural and spiritual meanings. My wand is a symbol of the magic, the energy and interconnection that happen as people hold it and pass it around. Some people recognize the wand only as a feather duster with doodads on it. But others recognize the magic, their eyes lighting up as they hold it reverently, adding their own magic to it. This is similar to the response of participants in Sandy's story to the symbolic funeral. Some of them *"kind of sloughed it off"* but most *"took it seriously."* As I said previously, there may be many reasons for not participating, one of these may be that they are not ready to engage in the ritual, to use their imaginations in this way, as Leslie said in our collaborative e-mail conversation, *"we can stimulate an environment in which magic can occur but if the learner isn't ready…we can lead a horse to water but we can't make it drink…"* Ritual and metaphorical symbols such as the funeral process or a magical wand are part of the creativity facilitators can bring to contexts where logic and the scientific mode are generally dominant, thus creating space for the possibility of transformation of some kind.

Sandy used this particular ritual in the context of a large strategic planning process that had many components. He spoke in his interview of other ways that he engaged the

participants, as he described them, "*who are used to dealing with things immediately and coming up with answers…that's what they do for a living*". Sandy wanted to engage them in dialogue and described other strategies to do so. For example, he used an appreciative inquiry into what had worked well in the past so they could build on that. Another strategy he described was an exercise where the group only asked questions without providing answers for a period of time before moving onto finding solutions to an issue. Sandy knew for this particular group that this would be challenging. One of the ways that Sandy engages people who are hesitant about these kinds of exercises is giving them short articles to read ahead of time, to provide a rationale for and a better understanding of the activities he uses. He engages their intellect as well as their emotions to create a space where they can connect to each other more deeply. In his interview he said that there is an element of teaching in the work he does with groups, saying, "*I once playfully called what I do 'facilitraining' because I can't help but build an educational element into some part of the sessions.*" Throughout the interview he referred to a variety of resource books and videos he uses in his sessions. In this strategic planning project the CEO had read *Good to Great* (Collins, 2001), had liked it and so was supportive of the framework that Sandy used from the book. The Collin's model has as one of its key features the Hedgehog Concept, which is:

> a simple, crystalline concept that flows from deep understanding about the intersection of the following three circles: 1. What you can be the best in the world at…2. What drives your economic engine…3. What you are deeply passionate about…(Collins, pp. 95 – 96)

In Sandy's situation the group responded to the questions by saying "*what we are passionate about is our people and our way of operating and what we want to be best in the world at is client satisfaction*" (Sandy, interview). It took several meetings for the group to get to this answer because the group split into two camps, the people-oriented camp and the business results camp. Sandy tried a variety of strategies; not all of them worked. Long-term projects like this Strategic Planning Process often require several attempts to 'make magic' because there may be long term habits of communication and organizational culture that can get in the way of people's ability to be present and authentic with each other. The next story illustrates another strategy that Sandy used in this particular process to get agreement around the answer to what they were passionate about and what they wanted to be best in the world at.

Emissaries - Opposing Camps (Sandy, interview)

I had the two camps elect emissaries that they thought were going to go and badger the other group to accept their position. I asked each camp to select a leader who really understood their position. As it happened the outgoing CEO and the incoming CEO were in separate groups and they were the people who were picked. Everybody had the assumption that their guy was going to convince the other people. I surprised them when I told them I had left out some information and that was that the emissaries' task was to go to the other group, hear their case out, ask all kinds of questions and come back and explain the other group's point of view to the original group. These 2 guys took it seriously and did a wonderful job. They went back and forth and so they ended up arriving at this thing that fit with the concept developed in Collins but they put their own stamp on it. It was really wonderful to watch the 2 groups arrive at these answers and come to an understanding of what one another wanted.

The element of surprise can be useful in facilitating groups such as this. Sandy did explain to the group why he chose to withhold the instructions about the emissaries' role. He explained to the group that he had done this in order that they would choose someone

who really understood their own position, someone who could convince the other group

of that position. In this way, when they had to go and understand the other group's

position, they would have a good understanding of both and could more likely come to an

agreement between the two positions. Sandy's exercise puts into practice one of Covey's

Habits of Highly Effective People, seek first to understand and then to be understood

(Covey, 1989), that he often uses with groups to get them to really listen to one another.

In this case, the emissaries had to seek to understand both positions. Sandy described this

experience as magical because "*as the facilitator I was simply directing the process. They*

were doing it all and everyone was involved in it, everybody was engaged" (Sandy,

interview). Engagement, being present together, is an important component of magic.

The next story continues the threads of emotions, engagement, presence, learning and

transformation from the previous stories and adds to these the notions of love and power.

This story is also found in Chapter One, Magical Snippets.

A Complete Love Affair (Liz, interview)

I was teaching my interviewing skills class at UBC that I teach every Fall term and there
was something about that class where it was a complete love affair. It's hard to describe
what that means. It's almost like falling in love, the class with me and me with the class
and I don't mean that in a sexualized way at all so what happened during the course was
… they learned everything and more, that I was trying to teach them. At the end they
were the most incredible counsellors that I have ever taught. There was always laughter
and there was always learning and there was application of learning and challenging.
What I did was I challenged them. They had to do role-plays with video camera and get
feedback. Within the first class they were prepared to take risks and they created a safe
environment for themselves. I created, we created a safe environment where they felt they
could take risks very quickly. They weren't afraid to give each other feedback that was
constructive. It was about their behaviour, their performance and it was not competitive.

They shared with each other their own sense of self, who they were, what they wanted to become and in doing so they became it.

Falling in love is a wonderful way to describe the magic that can happen when facilitating groups. In applying the concept of falling in love to her classroom, Liz describes the kind of environment that frees the facilitator and students to fall in love with each other. There is learning, in this case, the learning to be the best counsellors Liz had ever seen. The students shared themselves, the 'who they were,' in order to transform, becoming what they wanted to be. They became present with each other. Like falling in love there are paradoxes, in this case the paradox of safety and risk, and that of challenge and fun. Liz creates with the group an environment where these qualities can co-exist. Liz's story illustrates well 'the loving practice' that hooks (2000) uses to describe what teachers do to create community in their classes.

When I asked Liz how the safe environment was created, she described the process of creating guidelines together in order to have the kind of environment they wanted. All of the co-researchers use some kind of guideline development process such as this. I illustrate the process of setting group guidelines with the agreements process used in this inquiry, Chapter Two, Collaborative Climate. In Liz's case she explained that in the first session of the first week of this class, she modelled the kind of behaviour that would make the environment safe, by setting out the plan for the class, "*what they could expect of me and what I would ask of them, setting clear guidelines and then following them and checking in with them*" (Liz, interview). There is a language shift in her story from "*I created*" to "*we created*" as Liz talks about the creation of a safe environment. This

language shift suggests a shift of power from facilitator to group. This shift allowed them to take the responsibility to give each other constructive feedback and to do so in a non-competitive way. In this kind of classroom setting she was a little more structured than in other facilitation settings due to the authority of being the teacher and having to evaluate the students.

This kind of authority makes the power relationship between the facilitator and the students in the classroom more formal than in other facilitation contexts. However, in other contexts where the power dynamic may be looser, it is still there. Liz said the element of power exists in any facilitation context and it is important for facilitators to be aware of differences in power. For example, in her interview, Liz talked about the "*power/authority by my face*" when working as a white person in First Nations' communities. She described working with a variety of women's groups. Some of these are moving from hierarchy to a collective model and some are moving from a collective model to hierarchy. In all cases, Liz said it is important that facilitators take responsibility to analyze the power dynamic of the contexts within which they work.

The theme of love arose in the collaborative face-to-face conversation in this inquiry: "*I walk into the room in love…*" (Leslie); "*if you are with people at the level of love there is a connection that is so powerful*" (Sandy); and in response to Sandy, "*there is something so amazing about owning it too*" (Glynis). Glynis went on to describe a statement that captures the essence of a professional love relationship, advice that her minister had received about the relationship with a congregation, "*let them fall in love with you and*

fall in love with them back." In the public sphere, such as this one, letting a group fall in love with you is about being present and caring as I illustrated in my story, *Sharing My Inner Life*. Falling in love with them back is seeing their presence and reciprocal caring. As well, in the classroom and other facilitation contexts love means caring about learners, working for their success and potential transformative learning. Liz describes the meaning of love in a classroom as a place where people become present with one another, respect each other, give and receive feedback from each other, learn together and have fun.

The meaning of love in the public sphere is a place where human interconnections happen in order to make meaning together, similar to the sacred spaces described by Tisdell and Tolliver (2003). The space is holistic, as Liz said, in this class she felt "*happy, emotional, vulnerable, giving…it's sharing heart, mind, body, spirit*" (Liz, interview). She described the vulnerability of exposing oneself, which I call being present, and the balance of that vulnerability with managing oneself by being contained in using one's facilitator skill set. Her description of this balance of vulnerability and facilitator skill set is similar to Palmer's (1998) paradox of identity and technique. I illustrate vulnerability further in the next chapter.

This next story, Glynis' peak experience story that is also found in Chapter One, Magical Snippets, is an example of an appreciative inquiry and illustrates important qualities of magic: collaboration, energy, engagement and creativity.

Creating Powerful Connections (Glynis, interview)

I was facilitating at a conference put on by a group of people from various not-for-profit organizations in our community who wanted to find ways to collaborate across the different sectors – arts and culture, social services, sports, and others. I used appreciative processes with them to explore the theme, "creating powerful connections." On the first evening of the conference they interviewed one another and worked in small groups to come up with provocative propositions that were amazing and inspiring. The organizers were threading the arts through the entire process. I would have liked the participants to add images to their propositions, but there wasn't enough time for this. During the planning phase, I talked about my disappointment with one of the organizers who offered to find a teacher in town who agreed to have her grade 6/7 class decorate the propositions that we created. I e-mailed the provocative propositions to the teacher that night at midnight and she wrote them on flip chart paper. Over the course of the next morning her students decorated them. I came in early so I could talk to and watch the children because I thought it was important to bring their energy back into the discussion at the conference. The flip charts were gorgeous. That afternoon, we papered the walls of the conference room with them and worked with them further in the second part of our process. People were really engaged, in part because of these unexpected artistic offerings. We were all excited that we had been able to bring the voices of the children into an adult conference in an unusual way. People were inspired!

This story illustrates the application of appreciative inquiry to organizational/community planning, in particular to community non-profit organizations desiring to work more collaboratively together. The conference organizers chose the positive topic, "*creating powerful connections,*" step one of the five generic appreciative inquiry processes (Watkins & Mohr, 2001) discussed in Chapter Three. On the first evening of the conference, Glynis facilitated the participants through the next three steps of the process. In step two, the participants paired up to interview each other to elicit peak experience stories, stories of life-giving forces, to discover what was already working well in relationship to the focus of the inquiry, creating powerful connections. In step three, meeting in small groups, they identified themes from the stories and began step four, creating images of a preferred future, by writing provocative propositions (Watkins &

Mohr, 2001). In Glynis' story the experience was enhanced by the energy of the school children, added through their images on the flip charts of provocative propositions. On the second afternoon of the conference the participants were highly engaged as they undertook step five, to find innovative ways to create the future represented by the images and provocative propositions.

In her interview Glynis described herself as a "*creativity champion*." She believes anyone can be creative and her vocation is to "*sow the seeds*" to allow people to be creative. Being creative can allow the possibility of transformation, magic, to happen. Glynis' story illustrates her creative use of appreciative inquiry structures, bringing in artwork from children to the adult workshop on "*creating powerful connections*." In doing so she embeds the topic into the process. She uses the children's creative images to create powerful connections. These images connect to the words, provocative propositions, of the conference participants and, as a result, powerfully engage the conference participants to connect to one another. In this next story, Glynis further illustrates the creative element of magic.

Wildly Magical Collective Creativity (Glynis, collaborative e-mail conversation)

I had a wildly magical morning yesterday. I'm doing 4 sessions on non-traditional prayer with a group at my church. These women are a gorgeously open-minded crowd. Many would not call themselves writers and many would likely say they're not creative (ample evidence to the contrary notwithstanding). At this particular session, we were examining psalms – both Biblical and contemporary. For the last half hour, I proposed that we create our own community psalm. There were some gasps, probably of concern or disbelief. The process was simple. They did some individual writing based on some carefully crafted prompts. Then I stood at the flip chart and invited them to offer the words onto the page. We did no revision, just created on the fly. We were up to three

pages in no time at all. At the end, we had a psalm that absolutely took our breath away. We were soooo thrilled with the power of our collective creativity! I was high all day from it, and I suspect some of them were too.

Creativity is a quality of 'making magic' and requires the facilitator to listen to her/his intuitive voice, responding to where the energy is, to engage people in new ways of doing things. This can be risky because some participants may be uncomfortable and, therefore, may be resistant to participating. This story also illustrates the importance of clear structure to enable the creativity to happen, as Glynis said in her interview, "*I see my role as creating the structures through which people can find ways to connect and spark off each other*." In this story she provided carefully crafted prompts for their individual writing. This illustrates the importance of facilitator preparation, bringing in resources such as these prompts to enhance the creative writing activity.

Other stories told in this inquiry illustrate facilitator creativity. For example, Sandy's creative use of the symbolic funeral provided his participants an unusual way to connect to one another. One of Sandy's metaphors to describe magic was "*getting out of the box*" (Sandy, interview). In his interview he described a transformative learning experience, a creativity workshop where, as a participant, he discovered his own creativity and how that discovery impacted his facilitating practice. In reference to this workshop Sandy said, "*the manner in which they facilitated the session and the discovery, on my part, that I did in fact have some creativity within me was a real landmark, changed my beliefs about myself…*" (Sandy, interview). One of Sandy's creative facilitating tools is the use of popular movies to illustrate concepts and provoke discussion.

Liz, in her interview in response to the question about why she moved into consulting, said, "*I wanted to be freer to both learn about creativity and practice it more.*" She described a variety of structures that she uses and said how important it is to match structures and context. For example, she said that passing an eagle feather may be appropriate with a group of First Nations people whose cultural traditions include such sacred practices, but would not be appropriate for other groups. Leslie, in her interview, described a creative simulation activity in her adventure tourism class where the students slithered around through slots and chimneys in the dark in her classroom. My use of a feather duster as a magic wand is creative. I also use a variety of artful processes, for example, having participants select magazine pictures to create their own metaphors for themselves as teachers. Through artful processes we can communicate in ways that may not be possible in typical dialogue. There are many ways to see the creative in what we do, through planned creative structures and through our responsiveness in the moment, based on listening to our inner voices and imaginations about what might work, "let's try…" Listening to our inner voices, our intuition happens in many ways.

In this next story Leslie demonstrates creativity through reflection-in-action (Schon, 1983), a skill in 'making magic.' Reflection-in-action is the process of thinking, intuitively because it happens so fast, about how to act when something unusual and/or surprising happens. This story, one of Leslie's peak experience stories, is also found in Chapter One, Magical Snippets.

Vulgarity is OK (Leslie, interview)

I was facilitating the process of developing customer service standards for the corporation using focus groups of frontline people. Their managers who participated in the process sat in silence at a table with duct tape on it to symbolize their role of just listening, no talking. I was developing agreements with one of the focus groups, a group of industrial men, when one participant suggested, "vulgarity is ok." I was taken aback at first and said, "do you mean we won't use any swearing in the room?" And he said, "no, that we can swear in the room." There were lots of nods of agreement around the room. I was surprised; usually agreements are sort of gentle, thoughtful, nurturing respectful things. So I asked them "what does that mean?" They said, "customers are always swearing so if we are telling a story we need to be able to swear to make the story real." And I thought, "what a broken organization and this is what they need," and said, "fuck." They didn't bat an eye so I built on what they were doing and said, "no shit?" and they said, "exactly." They needed to test me and to test that the silent managers at the back table were okay with this. I was facilitating 2 processes simultaneously, keeping my eye on the gasping managers as well as the nodding front line workers. We all passed the test and moved on to develop the standards in a very structured way.

Once again this story illustrates the use of developing agreements for working together, a process all of the co-researchers use in 'making magic.' In this case the surprise for Leslie was the kind of agreement that was being suggested. In telling her story she illustrates her reflection-in-action through probing the participants for what they meant by "*vulgarity is ok*," allowing them to explain that their stories about front line experiences with customers would include swearing. Reflecting in the middle of the action of developing agreements and acting on their explanation, Leslie decided to swear as the appropriate response. By swearing, Leslie is demonstrating once again, as she did in her previous story (*Grief and Professionalism*), that being professional is not following any usual rules but being able to respond to the needs of the group in the moment. Leslie refers to being tested. The group of frontline workers and the managers were watching her and each other to see if one of the guidelines that had been set would be respected, that is, management participation only as silent observers listening carefully to the input

from the frontline workers. The managers stayed silent and Leslie responded appropriately by swearing, diffusing the tension and allowing the group to move onto the task of developing the standards. As she says in her story they all "*passed the test*."

This story illustrates the need to release or diffuse emotions in order to get to the task by finding out what is driving those emotions. As she says in her story, they were able to get onto developing the standards in a very structured way. It is an amusing story to read and I imagine there was amusement, probably laughter in the process, which is useful in 'making magic.'

In our own magical collaborative face-to-face conversation, we did a lot of deep belly laughing as we celebrated our journey of inquiry together and as we discussed how laughter enhances the possibility of magic. Glynis told a story about coming out of a silent retreat, "*belly laughing from the hearts and souls of ourselves*." She told this story as the theme of silence arose as we sat around my table talking about magic. And as we had with laughter, we lived the silence, going in and out of it throughout the evening. As well as experiencing the reflective silence together, we told stories of experiences with silence. Leslie talked about her experience singing in a choir of one hundred people where after each song they had a period of silence that allowed them "*to get to this truly holy place with the reverberation of the music and spirit*." Sandy talked about giving participants a topic and getting them to think in silence before doing anything with the topic because "*the quality of ideas after time for silence is better*." We discussed the challenges with using silence in Western culture where many people are uncomfortable

with it, wanting to fill the space with words. We agreed that, as with any process, facilitators need to make the purpose of the process clear. The following two stories illustrate the use of silence by Glynis and Liz in their facilitations.

A Story about a Story – Inviting Silence (Glynis, collaborative face-to-face conversation)

The Sunday morning of my Friday evening, all day Saturday and Sunday Narrative Skills Workshop is always the high point, the heart of the workshop. Participants work with a coach/champion to create a story, hone a story that they want to share with the group and then they all come together and tell the stories. We invite the silence between the stories as a way of appreciating the stories differently. The participants struggle, valuing the silence and yet wanting to respond with applause. In this particular workshop I was able to tell a story about an experience that I had had at a choral concert. It was in a big gym with 200 people watching. The choral director had suggested to the audience that one of the ways to really value the singers is to be silent in the moment right after their piece. So, for the final piece after the group finished singing the director made a gesture that really insisted on silence. It was totally beautiful. I had never thought to tell this story in preparation for the storytelling in my class but did so in this class, and by doing so they were more comfortable in the silence. What is always magical was even more powerful. It was an honour to be in the presence of all these spectacular stories and all these amazing voices.

Glynis' story highlights the power of silence as a way to connect people by allowing space for reflection on and attention to each other's stories. Silence creates a respectful space for receiving and reflecting on what has been heard. This is similar to Kessler's (2000) use of silence to invite soul into her classroom. It is also an important ritual to add to facilitating processes. This story illustrates the power of using storytelling as a facilitating technique. By telling her class this story about silence, she invited them to also use silence in their process of storytelling. Her use of a storytelling technique was especially powerful in this workshop because its content was narrative skills. In selecting facilitating techniques it is important to appropriately match technique to content.

In this next story, Liz's students identify how important being comfortable in silence is for counsellors and how their own ability to be comfortable with silence had been part of their transformational learning experience in her seminar. Also, the students identified the link between transformation and magic.

Transformation and Magic (Liz, collaborative face-to-face conversation)

On Friday I ended one of my classes at UBC, a seminar that integrated the practicum with school learning. In doing the final checking out as we ended the class I asked what they had heard from each other and they said "transformation and magic." They said we've really changed. I asked them to explore what that change was about. One of the things they talked about was the ability to be comfortable with silence, how important in counselling to be able to sit with the silence. They learned how to respect each other, to contain themselves and to hold their emotions in a healthy place. There were problems in other classes so I asked them, "what was different about this one?" They said, "leadership and vision." They spoke about the vision that I presented at the beginning of the course and the guidelines that we created together. They will take their social justice and advocacy perspective to 4th year, to practice. Very powerful…

Liz's story also speaks to the importance of facilitator leadership and vision. Facilitating is not about simply responding to group needs. Facilitating is leading. Facilitators lead by clear planning of their structures and activities, and by intentionally creating and maintaining spaces where participants feel safe enough to take the risks needed for full engagement. It is important for facilitators to be self-aware of their own visions, to share these with participants and to work with participants' visions. In this story Liz's students recognized the vision that she presented at the beginning of the course and, as in Liz's earlier story about love, the importance of the guidelines created together to be able to realize the vision. In her interview, and illustrated in this story, Liz bases her practice on

her background as a social worker and her beliefs in advocacy and social responsibility. These beliefs are important components of who she is as she facilitates, her presence. She takes these beliefs into all her contexts and hopes by doing so that the work she does will have a larger societal impact. For example, she said in her interview that she works with social service teams "*to help them be healthy and transformed so that they can help their clients be transformed.*"

In summary, these stories have illustrated a number of themes related to the meaning of 'making magic,' facilitating collaborative processes, in particular the notion of being present. They illustrate the fundamental meaning of magic as transformation, in particular, the transformative learning of participants and of the facilitators themselves. This transformation happens through the collaborative processes where people become present with each other and make interpersonal connections in order to accomplish tasks. These stories illustrate the holistic nature of what we do as facilitators, which impacts both our strategies and who we are as facilitators, our presence. We create spaces where our spirits can meet through these connections of authentic selves and we do this by bringing intellectual, physical, and emotional strategies to create these magical (spiritual) spaces. We create these spaces by being present ourselves, using our minds, bodies and spirits. We are vulnerable in this work and need courage to be creative, imaginative, intuitive and appreciative.

These stories provide illustrations of the answer to the question, "how do we it?" that I

synthesized from the Stage One interviews. The 'it' is 'making magic.'

We facilitators of collaborative processes provide the group with structures to work together to achieve an outcome. The outcome may be a particular product, individual learning and/or it may be a process which enables the group to work better together in an ongoing way. We magical facilitators use the skills that we have developed over our years of facilitating in different settings. Although we plan structures, we pay attention to the needs of the group and of the individuals within the group in order to discern how to best modify those structures in response to those needs. We build structures with the group. For example, we work collaboratively with a group to set guidelines that all would agree to that would make it a successful collaborative experience. We are all experienced facilitators who draw on our learnings from both successes and challenges that we have had over the many years of our magic making practice as well as the theoretical learnings from reading and studying in the diversity of our fields - education, communication, arts, administration, social work, tourism.

We strive to be authentic, genuine, have integrity, and bring our whole selves to this work. We create structures to enhance the individuals in the groups to do this as well. Showing up, being present, bringing themselves to the group is a big step along the way to successful collaboration and interconnection. We create climates where the differences and diversities amongst the individuals in the groups are celebrated and build on the different strengths. (Appendix D – Revised Brief Synthesis of Making Magic)

The stories in this chapter illustrate the appropriate fit between strategies and ways of

being, and the context and content of the particular sessions. Our stories illustrate our

creativity and intuition in the use of a variety of resources, and in responding

appropriately to participant needs to allow both facilitator and participants to be present.

Although we strive for magic it is often very challenging and may not happen. In the next

chapter, I explore, through the themes of vulnerability and courage, some of the

challenges in striving for magic.

CHAPTER FIVE: VULNERABILITY AND COURAGE

magic…despite failure
…and maybe that's the big piece we get to take away…that despite our fatigue, time
challenges, fear of previous failures, still we DO go in and find that place of passion
within ourselves…and as we do that, it allows…gives permission…gives the
learners/participants something to 'tune to' …and right there, in all our human frailty
and vulnerability…and…
courage…
magic
happens
(Leslie, collaborative e-mail conversation)

In this chapter, I explore the notions of vulnerability and courage, key components of

who we are as we strive to 'make magic.' We are vulnerable in many ways. For example,

in Chapter Four, I illustrated facilitator vulnerability through sharing emotions and using

creative facilitating strategies. In Chapter Two, I was vulnerable in this inquiry, for

example, by sending out my poem to the co-researchers. We are vulnerable because, as

consultants, we move in and out of a variety of contexts and are constantly judged by

those who hire us to determine whether or not they would hire us again. They may not

hire us back if the work we do is not considered successful. We do not have the same

leeway that ongoing employees have, to make mistakes. So we must be cautious, because

of our vulnerability, about our risk-taking and courage, and yet often it is our risk-taking

and courage that leads us to magic. In this section, I present stories that arose as we

moved into a discussion of vulnerability and courage. Some of these ended up as

successes and some not. Not all experiences are magical. Sometimes the constraints

within which we work are not within our control and sometimes we make decisions that

do not work.

We need to reflect on these experiences in order to continue to learn and grow as 'magic makers.' We need to take care of ourselves, to forgive ourselves when magic does not happen, and to continue to have faith that it will happen again. We need to appreciate ourselves as well as the people with whom we work. In this inquiry, beginning with appreciative interviews and focussing on our peak experience stories created a space for moving into a riskier discussion in our e-mail conversation, a discussion of fear, failure, fear of failure, and vulnerability. These topics arose again in our face-to-face conversation. Leslie's e-mail at the beginning of this chapter, in a very poetic way, captures some of the threads of our e-mail conversation. As facilitators we keep on going, striving for magic. To do this requires courage.

I begin with Glynis' story that illustrates the courage it takes to work through struggles with a co-facilitator and to appear less than perfect as co-facilitators. This snippet illustrates being present, through the courage to reveal this vulnerability. Following the analysis of this snippet the chapter flows through themes of fear, conflict, failure and choices.

Magic through imperfection (Glynis, collaborative e-mail conversation)

I recall a particularly rich co-facilitation in which my partner and I needed to work through a number of professional and interpersonal issues with courage and sensitivity as we worked with the group over the course of a week. It was not a smooth week, and we sometimes struggled – hard work, and ultimately very rewarding. We learned from one another personally, professionally, and spiritually. This was a training of facilitators who would be working in partnerships. By the end of the week, my co-facilitator and I had done our work privately when that was more suitable, but we also shared what we felt

was important to share about our negotiations and struggles and joys when it was appropriate. The magic at the end was STRONG. One of the things I think is best about co-facilitating is that we almost always get to model imperfection in a very genuine way. When it's magical, those moments of imperfection are the most shining moments of all.

Co-facilitating can be very magical and also has the possibility of challenges as Glynis describes in this story. Co-facilitators may not share the same perspectives and values. It is harder work than facilitating alone. The hard work comes from the planning and ongoing discussions throughout the period of facilitating. Many times the participants are not aware of this work. In this case, Glynis and her co-facilitator decided to share with their group of participants some of the struggles they had been having with each other, to make present these struggles. It was most appropriate in this situation where the participants were facilitators-in-training. Co-facilitating was an important topic to address in the workshop. By sharing their experiences of how they worked through their struggles, they highlighted how this is a common but not insurmountable issue. Their story of struggle was an important part of the learning in this workshop, their own learning as co-facilitators and the learning of the facilitators-in-training.

Glynis makes an important point about facilitating, that magic can happen through imperfection. Often facilitators are concerned to make the experience perfect, but in fact it is the imperfection where they can be seen for who they are. In their imperfection, their authenticity and presence come to the fore. But not all situations end with success. Sometimes co-facilitating does not work well, especially when the co-facilitators are not ready to work through differences and arrive at a mutually agreeable way to work together. Along with the usual decisions around content and strategies, the co-facilitators

need to develop agreements for working together to ensure that their work will be successful. Glynis and her co-facilitator in this story did this work together behind the scenes over the week of the workshop and shared some of this work with the group when appropriate. This sharing clearly enhanced the magic.

Glynis speaks of learning through this experience *"personally, professionally, and spiritually."* The spiritual dimension of learning is meaning-making through human interconnections (English, Fenwick & Parsons, 2003b, Tisdell, 2003), in this case, meaning-making through the struggles and joys of co-facilitating. In my practice, I have found co-facilitating very rewarding and have had experiences of deep spiritual connections to my co-facilitator(s). As Glynis's story illustrates, co-facilitating requires hard work and at the same time it provides an opportunity for deep learning. Co-facilitating requires the facilitators to pay attention to each other as well as to the group. So the focus is even more multi-dimensional than when facilitating solo. Co-facilitators can build on each other's strengths, paying attention to places of complementary strengths. The participants' experience can be enhanced by the diversity of perspectives and resources that each facilitator brings to the sessions. Respecting and working with the differences, as Glynis illustrates in her story, allows the collaborative process to be strong and magical, but being vulnerable to feedback and negotiating through these differences can be challenging.

Fear

Another way facilitators may feel vulnerable is facing various types of fear. For example, we may experience fear of the unknown as we consult for a variety of new groups and organizations. As well, as facilitators we are continually on the edge of our competence. We are constantly learning, keeping up with new ideas and strategies for our work. We want to plan well, but to leave room to respond to the particular group and situation. As a result, fear is something we live with as part of our lives. Sometimes, as I am travelling to a new session, I wonder why I do this work, my stomach telling me how nervous I am, hoping that at the end of the session I will be rewarded with the joyful feeling, having 'made magic.' This happens most of the time, but not always. The next three stories illustrate the notion of facilitator fear.

Fear, pleasure, relief and emerging agendas (Sandy, collaborative e-mail conversation)

I continually set myself up for fear in facilitated sessions (as distinct from formal courses) by never having a fully set agenda or, in the case of some sessions, by having a set opening but no specific idea of how I am going to pull together the session. For example, in a session I did in Toronto recently I had an agenda for the first day and a half and none at all for the third and final day. I experienced great fear the night before the third day that I would not be able to pull together all the disparate elements of the session. I went to bed to sleep on it with great misgivings and concern but faith that I would come up with something, woke up at 4 am and wrote out an agenda and a series of exercises that resulted in a very successful session. The exercises built directly on what they had learned and produced on the first day and a half and, on reflection, could not have been produced in advance. Another one that worked despite great misgivings!! Pleasure is mixed with relief after a session like that.

Sandy made himself vulnerable by leaving the agenda open in order to design exercises that would build on what arose in his session. The courage it takes to do this requires, as

Sandy says, "*faith*." Sandy had faith in the process and himself as an experienced facilitator. Experienced facilitators have lots of resources, concepts and strategies of various sorts to bring to sessions. In this case, the exercises Sandy designed worked and, as a result, his initial fear turned into pleasure (and relief) after the session was completed. The personal reward of pleasure or joy motivates facilitators to continue to have the courage to be vulnerable like this. This story illustrates that, although there are many useful facilitation strategies, these must be matched with the context and the group. There is not a common magic formula for facilitating collaborative processes. Instead there are many ways to formulate magic in response to the particular context and group of people. Intuition plays a large part in knowing what particular combination of strategies to use. The next story says more about the use of intuition.

Planning Intuition (Leslie, collaborative face-to-face conversation)

I wanted so much to do a professional lesson plan for my workshop on intuition. I wanted to mark it for posterity so I would have this archival stuff and I was getting really panicky because I couldn't and I couldn't, my brain wouldn't go there… and it hit me the night before, duh…this is on intuition, I'll just bring my bag of tricks and who knows, who knows what this is going to be. I arrived and that's how we began, how else could it be? But I didn't know it. One student said, "You really do know what you're doing don't you?" I replied, "Truly, I don't." Fortunately, she had been in other of my workshops and had had magic happen, so she understood. Others said, "she really doesn't know, so this is really about using intuition and intention." That was the strongest credential that I could have brought into the room, even though everything in me, all my training said don't do that, be prepared.

This is another example of facilitator vulnerability. Leslie is vulnerable in this situation because she is grappling with what she thinks she should do as a professional. She wants to create definitive lesson plans for her intuition workshop and yet she realizes that to

model intuition as a facilitator she needs to be able to respond intuitively within the workshop. She does refer to her bag of tricks, her facilitator resources. In other words, she is not walking into the workshop unprepared. Like Sandy in his story about emerging agendas, Leslie is basing the workshop on her wealth of facilitator resources. But she still is vulnerable, knowing that the success of the workshop, the magic, will be based on her own use of intuition, bringing in the appropriate resources at the appropriate time. This story is another example of the importance of the fit of the facilitating strategy with the content of the workshop. In this case, if Leslie had gone in with a rigid schedule of preconceived activities she would not have been modelling the use of facilitator intuition. For all of us, we are often in situations, due to the nature of the content of our sessions, where we model what we are facilitating, putting ourselves on display, vulnerable to critique.

Sandy responded to Leslie's story by reflecting on times when he did not listen to his intuition, saying, "*we can sometimes get in our own way… I did the rational thing instead of responding to the intuition…the magic can be quite tied to intuitiveness in the moment*" (collaborative face-to-face conversation). Leslie explained that, by listening to her intuition throughout the two and a half days of this intuition workshop, magic happened. There would be lulls of silence where "*the group was truly in awe*" (collaborative face-to-face conversation). She also explained that she engaged the learners in this process, asking them what they wanted and working with them to intentionally create the workshop experiences together. Leslie's story illustrates that following intuition can lead

to magic. In this case it was, indeed, a very successful workshop where magic happened. It took courage for her, overcoming the "*panicky*" feeling, to have faith that it would.

The next story builds on the notion of intuition as Glynis illustrates a "*way to cope with fear*," how she responded to a challenging participant by surrendering, trusting that a solution would come from the group.

Participants will solve it! (Glynis, collaborative e-mail conversation)

I was doing a workshop in which a participant presented a particular challenge. I had addressed it in a way that felt good for most of the week, but I had a special set of activities planned that were the heart and soul of what I felt we needed to do as a group – and none of these activities were going to work for her at all. I had no idea how to address this in a way that was respectful of her needs and that still honoured the deep potential learning that was awaiting the group. I realized as I processed it that I couldn't find a way to live my values in this situation because they seemed at odds. I awoke in the middle of the night and planned and planned. And threw out and threw out. At the edge of exhaustion as morning was just around the corner, a voice came to me and said, "the participants will solve it." I immediately knew it was true, threw my books and papers on the floor, and fell asleep. Groggy the next morning, I wasn't sure that the voice had got it right, so I did continue to brood, but lower key. I walked into the room and still hadn't figured out what I would do. A participant came up to me. " I brought x today if you'd like it," she said, offering me the magical perfect thing for this particular situation. It meant that we could do it all. Meet the needs of the one. Meet the needs of the others. Go for the deep learning. I'm convinced to this day that nowhere on earth could I ever have found a better solution to the dilemma. I wanted to laugh and cry and hug. I did some of all three at appropriate times. Sometimes the way to cope with fear is to plan. Sometimes it's to get centred. Sometimes it's to build a vast repertoire of options available at the drop of a hat. What I learned that day was that sometimes the best way is simply to surrender.

This story arose in our discussion of fear. In this case, Glynis describes the fear of not knowing what to do with the challenge of one particular participant. She also illustrates that sometimes facilitators just do not know what to do. Some situations can be very

complex when trying to meet the needs of a group of diverse participants. Facilitators have responsibility to the whole group and, sometimes, it is not possible to meet the needs of all the participants. Glynis tried hard to plan for a solution that would meet both the needs of the participant who posed a challenge as well as the rest of the group, but finally she let go of her struggles to plan and listened to her intuitive voice saying that the participants would solve the problem. She does not tell us what the particular solution was that was brought in, 'x,' because that is not the point of her story. The point of her story is to illustrate how facilitators use a variety of ways to deal with dilemmas and fears, through planning, relying on resources and being centred. For me, being centred means to listen well to my participants and also to my inner voice. In this case, she illustrates the need to sometimes surrender to what will be. Surrendering takes courage and faith to know that the magic may occur beyond our planning and resources, through being open to the resources of our participants.

Conflict

In the next story, Sandy describes the challenge of getting a group of people who are in conflict to talk about it. His fear is around dealing with "*high-powered*" people who are conflict averse and his ability to get them facing the real issues. He makes himself vulnerable by pushing them to face their conflict.

Surfacing Conflict (Sandy, collaborative e-mail conversation)

…I did a set of interviews with the group and could 'feel' the tension as they talked. I had great fear, wondering if I could carry off this session, particularly as they were high-powered folks but who had a history of being conflict averse. I decided to outline the issues that were being left unsaid by typing up a summary of what they had said about each other (without attribution) in the interviews. It was really quiet in the room while they read the report. Then they started to talk around the problems without really addressing them. The session was failing before my very eyes. I tried method after method to try and get issues out but they skirted around them eloquently (they were highly educated and articulate folks). Just before the afternoon break, I noted a splinter group making eye contact with each other and I followed them outside where they were meeting to complain about the session. I listened for a minute, then jumped in and said, "I flew all the way down here to help you and you're not saying anything in the session like what you said in the interviews. What is it going to take to get you talking?" "Well, we expect you to say it for us," one of them said. "That's not going to work," I replied, "because I fly out tomorrow. You have to learn to say these things yourself. I did say a lot for you in that written report this morning. Three times today, you have verged on dealing with one of the really touchy issues and you backed off. How about I make that observation when we go back and then you jump in and take it from there?" They agreed. They did as they said they would and the session was a success, going to eleven that night as they dealt with the stuff that they unearthed.

Pushing this group to speak about the conflict worked in this case, but it is a risk that the facilitator takes. Often the risk of not pushing is even greater, that is, it may be more likely that the intervention is a failure if the facilitator does not push. In this case, Sandy knew that he had to do something because, as he says in his story, he had tried all sorts of methods to get the group to talk about their conflict, beginning with giving them a written summary of the issues. This story illustrates the importance of not only listening to what is being said, but also watching for what is being said by body language, in this case the eye contact being made amongst group members. Keen observation such as this is an important facilitating skill and then responding appropriately, intuitively in most cases because it happens so fast, through reflection in the moment about what to do next.

After telling this story, Sandy went on to explain why he prefers long-term relationships with clients saying, "*having long-term relationships means that it is more likely that I will be able to intuitively on the spot figure out what to do in a difficult situation if I know the players well*" (collaborative e-mail conversation). Long-term relationships also allow the facilitator to observe the results of the interventions. In many cases, as consultants going in and out of organizations, we do not have the opportunity to know, unless follow-up is built into the contract, the short-term and long-term outcomes of our work. Long-term relationships allow us to get feedback and respond to it in re-designing our ongoing work with those clients. Long-term relationships also allow for trust building. In this next story I describe a situation where, like Sandy, I pushed the people to surface their conflict in order to build trust between them. One of the reasons I was able to do this was that I had had a long-term relationship with them, having previously worked with them. At the time of this story I came in as an outside consultant to work with them.

Moving from Suspicion to Trust (Jeanie, collaborative e-mail conversation)

Phillip and Angela had deep anger, suspicions about each other. They worked in the same department where Phillip was the Department Head and Angela the Department Assistant. Phillip said to me that he was totally pessimistic about any possible working outcome. He wanted Angela fired or at least moved to another department. Both were willing to give it a try. I interviewed each of them individually then facilitated 2 sessions where they developed their agreements for working together. Lots of underlying stuff surfaced related to gender, personality and power differences. There were tears, harsh words. I pushed them to say what needed to be said, holding the container for them to do so safely. They had both worked with me in the past and trusted me. They didn't trust each other. By surfacing some tough stuff they began to see each other differently, to begin to trust, and agreed to try out their list of agreements for working together. They met with me 6 weeks later to re-visit and review. A shift had happened. There had been lots of progress and they were open to reviewing what they still needed to continue to work on. Years later they were still saying what an amazing thing had happened through this process.

Like Sandy, I was working with people who had serious conflict between them and who responded well to being pushed to articulate that conflict. Like Sandy, I did individual interviews before bringing the individuals together, an important strategy in working with a serious interpersonal conflict situation. Individual interviews allow each person to be listened to by an outsider, the facilitator, and to tell her or his story about the issues. Also, interviews provide the facilitator with information needed in order to design an appropriate intervention strategy, along with information collected from other sources. In this case, I also had information from discussions with their organization's Employee Relations Department, and my own knowledge through my previous administrative responsibilities for the department involved in the conflict. The trust I had developed in this previous relationship was an asset in this situation. I was an outsider with insider experience. This experience allowed me to have a depth of knowledge that I could tap into, to take the risks needed in pushing these two people to surface their honest feelings about each other.

I used the process of agreement setting as the framework for the discussions. This process allowed each of them to articulate what they wanted and, in doing that, also to articulate what was not working. My background in diversity training was very useful in this situation. I was able to help them see some of the structural influences that were impacting their problems. Some of these structural influences were their differences in gender, authority in the hierarchy, and historical relationships in the department. As well, we discussed how these differences impacted their communication styles and use of

power in their working relationship. Through discussion of their differences they were able to see each other, to be present with each other, more authentically and appreciatively, which allowed them to explore ways to deal with their conflict.

This particular case was rewarding for me because of my own previous relationship to the department, and because I was able to follow-up in both the short-term and long-term regarding the success of the intervention. Magic sometimes happens when what is considered impossible becomes possible. As facilitators we may take on what others consider impossible, such as this case, and sometimes magic does not happen. I move on now to stories which the co-researchers classified as failures, when magic did not happen.

Failure

In both e-mail and face-to-face dialogue we dug into our notions of failure. It is not easy to admit failure. It is a discussion that makes us vulnerable. But the appreciative approach to this inquiry, along with the other climate setting strategies discussed previously, helped develop the trust needed in order to discuss failures. In our face-to-face conversation, Leslie challenged our notions of failure, suggesting that magic may happen later, that a facilitated session may create an opportunity for magic, but as facilitators only there for a short time, we may not see the magic. It may be "*magic in waiting*," a term Liz used after our face-to-face discussion of the next story, her story about a facilitation that wasn't magic. She brought this story forward saying she was interested in talking more about a topic that had arisen near the end of our e-mail conversation, fear of failure.

No Buy-in (Liz, collaborative face-to-face conversation)

I did a facilitation recently where magic didn't happen. What happened for me was I had a personal stake in the outcome and I didn't like the leader. I had a personal reaction to how the leader was leading. I disagreed with the model and I reacted to his lack of skill. The personal part was that many of these people had been my colleagues and I saw them going down the tubes because I knew they didn't want this. In pre-meetings I had asked him whether we were going to negotiate the model and he said, "no." Well, the first question that was asked in the session was, "are you prepared to negotiate the model?" Once again he said, "no" and it just crashed after that. I couldn't bring it back. Then at the end he said, "that wasn't very successful was it?" When I tried to process why that would be with him he said it was my fault and the group's fault but that it had nothing to do with him. So magic didn't happen because I had no personal buy-in to the model or to him. My former colleagues had no buy-in…

Immediately after Liz told this story Leslie asked her twice, "*why do you think that magic didn't happen?*" In doing this she demonstrated a facilitator tool, a repetitive probing question, "*why?*" to invite Liz to reflect deeply on what she had called a failure. In response Liz first said, "*because there was no buy-in from anybody*" and to the second question said, "*there was no transformation.*" And as Leslie probed further Liz said, "*there was not safety to express differences of opinion no matter how much they tried to set the guidelines.*" And finally Leslie asked, "*do you think magic could still happen for that group from that experience?*" In response Liz suggested that magic might happen "*outside that space and time*" and the experience could be "*magic in waiting.*"

This conversation brought us all to reflect on our notions of what failure to 'make magic' means. As consultants, we are part of a larger context; consequently there are multiple influences on 'making magic.' Often we come in and go out again, never seeing the ripple effect of our sessions. Perhaps magic happens later, well after we are gone, or

perhaps magic is not possible given contextual limitations such as the short time period, organizational/group mindset or hidden power dynamics. This story illustrates one of the challenges of being a consultant and that is working with people that do not share the value of collaborative processes, working with groups to come up with models together. It is difficult to work with people who we do not respect, but we sometimes get caught in a situation like this where once we are facilitating there is no way out. We could do more upfront work with people that hire us but in Liz's case, although she tried to do this, it was clear that the leader was not interested in listening to other options, it was his model or nothing. Liz could have chosen not to do the session. Instead she chose to try, as we often do as consultants, hoping that through the facilitated session she could help her former colleagues with their process.

This is a situation where our emotional engagement with the participants may actually interfere with our processes, colouring our views as Liz says, having "*a personal reaction to how the leader was leading.*" In my own practice there are times when I find it very difficult to be appreciative of leaders whose behaviours I do not agree with, to find something good about what they are doing. I strive to apply an appreciative eye (Cooperrider & Srivastva, 1987) and when I am able to do so, in most cases it works.

Magic does not always happen. We did not talk about what Liz could have done differently but, rather, focussed on the need to take care of ourselves, forgiving what appear to be failures in order to carry on and be able to 'make magic.' We must forgive ourselves for not always 'making magic.' What is important is the desire to strive for

'making magic' by being reflective on both our challenges and successes, and by taking care of ourselves in order to have the faith and courage necessary to keep on trying.

After Liz told her story I told the following one that I felt was a failure, where magic did not happen.

The Disappearing VP (Jeanie, collaborative face-to-face conversation)

I was doing a one-day facilitation, an appreciative inquiry, for a dysfunctional team within a large corporation. One of the Vice-Presidents was there for the morning and he stated that he was very supportive of the process. At lunch time he said he had to go to another meeting and took off. The rest of the group went ballistic. Many said, "see we know we shouldn't trust him. He spent the morning saying how supportive he is of this process and now he has taken off on us. What does that say about his support?" In my head I was saying to myself, "Oh no, this is not going well, what am I going to do?" Well, I never did get them really on track. When he returned near the end of the day he said, "you haven't got much done." He certainly wasn't taking any responsibility…I had this horrible feeling since I didn't think we had got much done either. But I thought he had a lot to do with this…The next day the woman who had hired me said she was upset by his leaving as well and could I put that in my report…I did and struggled with the language of that…haven't been back…still leaves me feeling yucky…

Both my story and Liz's story illustrate the challenges of consultants coming in to do sessions with people in power who either are entrenched in their power, as in Liz's story where the manager used his power to impose the model, or in this case, where the Vice President may or may not have been aware of the effect of his power on the group. As I discussed in Chapter Three, to be effective an appreciative inquiry must have the key decision makers involved (Bushe, 2000a). In this case the Vice President was involved for the first half of the daylong workshop, but the group felt resentment when the Vice President left at lunch for several hours, returning only for the last part of the day. This is

an example of situations where unforeseen things can happen, and as facilitators we may not have much control over the outcome. In this case, if I had known that the Vice President was going to leave midway, we could have discussed this as a group in the morning when we developed our agreements for working together. We could have discussed roles and limitations to those roles. One can never know if the situation would have been any different. When he did return, I could have had the group surface their concerns right there in the meeting instead of containing them for later, as in my conversation the next day with the person who had hired me. These are all tough facilitator decisions, knowing when to push people, when to move them along, not knowing what to do but having to do something. Sometimes I walk away from the contract feeling discouraged, not getting the tasks accomplished, feeling like magic did not happen, and wondering if it is possible that it might happen later, rarely knowing.

Another example of the impact of power on the possibility of magic is a brief reference by Sandy in our collaborative e-mail conversation, to what he called a spectacular failure, "...*a series of well-meaning Covey[13] based sessions where the person in charge of the organization espoused Covey principles but contradicted them in controlling and emotionally abusing staff.*" The subject line of the e-mail where Sandy listed this as one of his failures was "*Ugg—failure, what a yecchy topic.*" "*Yecchy,*" like my "*Yucky,*" is not a good feeling to have, but that is how we feel when a session does not go well. We feel we have let people down as Liz did in her snippet, *No Buy-in*, where she describes

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[13] Sandy is referring to using Stephen Covey's principles found in: Covey, S. (1989). *The 7 habits of highly effective people.* New York: Simon and Schuster.

seeing her former colleagues "*going down the tubes*." And yet we carry on, knowing that next time might be better, or not. As consultants we obtain work based on our reputation of success, so it is easy to feel fear of failure as we move into challenging sessions such as the ones Liz, Sandy and I describe. We know that magic does not always happen.

Choices

It takes courage to make choices about taking work, in situations that may appear to have conditions less than ideal for magic. It takes courage to keep on trying to 'make magic' and, at times, to decline work when factors such as the mismatch of espoused values and behaviours exist. There may be times when we should not set people up for disappointment, such as the case Sandy describes above, where creating magic with them and then sending them back to their organization with a CEO who does not live his espoused values may destroy the magic created.

Sometimes we choose not to try to 'make magic.' For example, if in our contract negotiations we find out that there may be a mismatch in values, we can choose not to take the contract. We can respectfully decline, but it is not easy as consultants to say 'no' because obtaining contracts is a large part of our work. In this next story Glynis illustrates how she priced herself out of a job when she perceived a mismatch in values.

Pricing Myself Out of a Job (Glynis, e-mail conversation)

Sandy, your Covey "failure" reminds me that the magic making is always in a larger context. I too have had my breath taken away on occasion by similar situations. At those times, I've questioned myself, my preparation, my values, my faith. It's not ever stopped me from doing what I do, but it has encouraged me to think responsibly about what I do and how I do it and if I'm a good fit with a group or organization or leader. I once priced myself out of a job on purpose because I realized partway through the negotiations with the person in charge of the group that I felt I was about to walk into a situation like that. I needed to honour the message that said that my "magic" could actually make things worse because I would be setting the group up for all sorts of unmet expectations. I have no idea if I was right, but I wasn't prepared to risk it.

In situations like this it is difficult to decide whether or not to take a contract. While we were engaged in our collaborative e-mail conversation, Sandy was in the midst of investigating a situation where the people had deep-seated emotional rancour towards one another. He was deciding whether on not to take on the contract. He has a lot of experience working with teams where a team member(s) is a 'malignant narcissist' (Hare, 1993), a person who is very destructive and not able or willing to change their destructive behaviour. I told the following story about a situation where I had experienced this kind of person.

Malignant Narcissist (Jeanie, e-mail conversation)

Sandy, I know what you mean about those people who, luckily are rare, are not able to get past their own power issues. I remember a situation where I did individual interviews, listened to all sides of the story, mediated between the 2 key players. Luckily, the whole plan fell apart and didn't go further. The experience was quite demoralizing as the facilitator. I don't think there was any hope for much progress with this particular group because one member was a 'malignant narcissist,' not language I had to describe the situation at the time. I believe, like Leslie, that people yearn for magic and so I take the

challenging work on hoping for at least some progress. I work on forgiving myself if it doesn't work…I think back to the ones that did work.

Unlike the success I experienced with Phillip and Angela in my story, *Moving from Suspicion to Trust*, in this case, although I tried similar strategies, they did not work. The reasons these strategies did not work may be many. Some of them that I could identify were that the participants did not really want it to work and there was no desire for magic. One of the participants had a reputation for being very destructive in her working relationships. On reflection, I realized the naivety that I had regarding the possibility of transforming this situation. Some people are not ready for appreciation. They are so entrenched in the negative energy of their habits of interacting. Whatever is behind the behaviour, possibly pain, is complex and not something that can be resolved with a quick fix. This kind of behaviour requires strategies beyond my skills. It is important that facilitators recognize the limitations of their skills.

In this situation, I could have declined the offer to do this contract and in retrospect, that might have been wise. However I naively live in the hope that transformation can happen, even with very negative type people such as the person involved in this case. In my snippet, *Malignant Narcissist*, I refer to a story that Leslie told in response to Sandy's question, "*when do we reach the point in 'checking out' a possible group to work with – and finding deep rancour and suspicion – where we decide 'the magic is unlikely to happen here' – should we even try to have a session???*" (collaborative e-mail conversation). The following is Leslie's story.

Trust That They Yearn for Magic (Leslie, collaborative e-mail conversation)

I'll jump in with some work I've been doing with a company. Strong, hierarchical, top down approach based on operational efficiency for decades. Morale is the lowest it's ever been. Corporate structure is changing dramatically. They were in a strike position. Most were fearful they would lose their jobs. All have a strong sense of loyalty to 'their' company and have endured soul destroying management decisions and working conditions for 20…even 30 years.
We ran one day training sessions…and devoted the first 2 hours to just listening to them complain…they needed to be listened to BEFORE we could actually do any 'real' work. I learned this from Stephen Brookfield who advises to open each class with 'chat'…and really listen to open to the possibility of removing barriers. They were still sceptical…but wanted more…They asked me to design and deliver a customer service training program for them. I asked them for their definition of customer service. Blank stare…didn't have one…they asked me to buy a $30 book and use their definition. I said 'no' (and this is where I saw the real magic begin to happen)…I said we should 'trust them' to come up with their own definition and standards…and it would cost closer to $30,000…and they did…and truly magic is beginning to happen…at the core of the organization…folks are resonating with a truth that has long been absent…they are bringing themselves forward in this project asking for further involvement, asking that their names be put on the standards. Trust them, let them talk, listen to them, trust that they yearn for magic, and keep holding the space in which that can happen…In my case senior and middle management is supporting this initiative…and so, on a large scale, major changes are beginning to happen…

Management support as described above is an important element in effective change strategies. It could have been less than successful if Leslie had not stood her ground in the design of the initiative. In this case Leslie said "*no*" to using the book definition of customer service and, instead, convinced the corporation managers to trust that a more effective process would be to have the front line workers come up with their own definition of customer service. Her story illustrates facilitator courage in taking the risk to stand one's ground about the process, being strong in her knowledge and skills regarding the process of getting the desired outcome, that is, a definition of customer service. It illustrates her deep understanding about the importance of ownership of the process and her faith in the groups that they could create their own definition given the space to do so.

Leslie stood by her belief in the notion that people yearn for magic, much like the educators who are writing about spirituality (O'Sullivan, 1999; Tisdell, 2003; English, Fenwick, Parsons, 2003b, Tisdell & Tolliver, 2003), who say that people yearn for spiritual connections. Spirituality and magic are similar. They both are about human beings making meaning together, searching for answers together. In the process of working together in an interconnected way, when magic happens, the people involved may move along in their journey to a better understanding of the questions and meaning they are seeking.

In summary, the stories in this chapter explored the challenges of 'making magic' through the themes of facilitator vulnerability and courage. These challenges include working with conflict, dealing with our own fears and failures, and making choices. Within each of these, the stories illustrate further who we are and what we do as we facilitate collaborative processes, striving for the magic, the transformative learning that can happen both individually and as a group. It is not easy work. So why do we continue to strive for magic? We believe it is valuable work because it creates the possibility of constructive change in the worlds within which we facilitate. It is of value to us as well, because we continue to learn and grow through our 'magic making' work.

In the next chapter, I bring this magical journey to a close by providing a summary of findings, implications of the inquiry for facilitator development and research, and the impact of the study on my ongoing practice as a 'magic maker.'

CHAPTER SIX: ONGOING MAGIC

I was falling in love when the magic wand entered my life. I continue to be in love and to love in many ways, personally and professionally. Undertaking this inquiry has been a loving adventure, allowing me to explore the passion I have for 'making magic,' facilitating collaborative processes. I bring to a close this magical journey of inquiry by presenting a summary of the findings; the implications of the inquiry for facilitator development and further research; and conclude with the impact of the inquiry on my own practice. As I do so, I know the magic will be ongoing…

Summary of Findings

This thesis is a magical quilt of interweaving stories, literature, concepts, and themes that inquire into and represent the meaning and value of 'making magic,' facilitating collaborative processes. The findings of the study contribute to the theory and practice of facilitating collaborative processes. In this section, I highlight some of the key findings that are represented: the inquiry itself as an example of facilitating magic (magical inquiry); the meaning and value of 'making magic;' and notions from the literature (magical notions).

My intention, as I set out on the journey of this inquiry, was to explore my practice, and that of other facilitators, of 'making magic,' facilitating collaborative processes in order to answer the following two questions:

1. What is the meaning of 'making magic,' facilitating collaborative processes?

2. What is the value of 'making magic,' facilitating collaborative processes?

Four other educational/organizational consultants joined me in this inquiry that was itself a collaborative process that I facilitated in three stages: interviews; collaborative conversation; and data analysis, the magical quilt of interweaving stories, themes, and concepts. The Stage One interviews provided stories and themes of magic that I synthesized for feedback from the participants in Stage Two. In Stage Two we made magic together, moving from being researcher and participants to being co-researchers as the process became more collaborative. Narrative inquiry allowed themes to emerge based on the anecdotes of our experiences facilitating collaborative processes. Appreciative inquiry provided a safe space for us by starting with our peak experiences allowing us to take the risks to be more critical of the conditions for magic, as we moved into discussions of fear and failure, and the challenges of striving for magic. Each one of us came away with our own transformative learning, and appreciation for each other, for the challenging work that we do and for the opportunity for professional connections such as these.

The word magic has many different meanings. In this study 'making magic' is used as a metaphor for the co-researchers' peak experiences facilitating collaborative processes. This study explored the co-researchers' joys and challenges of doing this 'magic making' work. The meaning and value of 'making magic,' facilitating collaborative processes evolved over the three stages of the study. The following three synthesized pieces were developed in response to three questions: what is the meaning of 'making magic,' facilitating collaborative processes?; how do we do it?; and why do we do it? Each was re-stitched after feedback from the co-researchers. Following these three synthesized pieces I reflect on the key findings from Chapter Four: Being Present and Chapter Five: Vulnerability and Courage that further illustrate the meaning and value of 'making magic.'

What is the meaning of 'making magic,' facilitating collaborative processes?

Facilitating collaborative processes is working with groups, learning groups or workplace groups, to purposefully guide them towards, and to make it easy for them to achieve their intended outcomes. These outcomes may include a plan, re-organization, individual learning, group learning and/or strategies for getting along better. Along with the intended outcomes may come unintended outcomes such as better working relationships, understanding of the root causes of problems, or alternate outcomes revealed through the process.

When the magic happens in this collaborative process the group becomes more than the individuals put together and/or the group process aggrandizes the learning. The group becomes an interconnected whole. Magic is this transformation, the alchemy that happens when the people in the group are interconnected and authentic with each other.

How do we do it?

We facilitators of collaborative processes provide the group with structures to work together to achieve an outcome. The outcome may be a particular product, individual learning and/or it may be a process which enables the group to work better together in an ongoing way. We magical facilitators use the skills that we have developed over our years of facilitating in different settings. Although we plan structures, we pay attention to the needs of the group and of the individuals within the group in order to discern how to best modify those structures in response to those needs. We build structures with the group. For example, we work collaboratively with a group to set guidelines that all participants agree would make a successful collaborative experience. We are all experienced facilitators who draw on our learnings from both successes and challenges that we have had over the many years of our magic making practice, as well as the theoretical learnings from reading and studying in the diversity of our fields - education, communication, arts, administration, social work, tourism.

We strive to be authentic, genuine, have integrity, and bring our whole selves to this work. We create structures to enhance the individuals in the groups to do this as well. Showing up, being present, bringing themselves to the group is a big step along the way to successful collaboration and interconnection. We create climates where the differences and diversities amongst the individuals in the groups are celebrated and build on the different strengths.

Why do we do it?

We do this work because we believe that by working with our groups to learn how to work together better, more collaboratively, we will impact the worlds in which our participants reside in a positive constructive way. We hope that the impact of the transformations that we facilitate will ripple out into the larger world. As the co-researchers discussed, we have social responsibility to make a positive difference in the world. The differences we hope to make would be people taking into their own contexts the practices of being present, interconnected and caring. In doing so, we hope those contexts will be transformed to more magical places where people's hearts, souls, and minds are all present. The work we do is for the needs of the group and the individuals within the group. It is their magic/learning that we intend to facilitate. It is of value to them. Along the way we are part of this magic. We learn and are transformed by the magic. It is also of value to us.

We make magic because it gives us joy. We are creative and courageous and believe in the creativity and courage of our participants. We work hard, play, have fun, feel the joy that it brings us, as well as the group. We are continual learners ourselves, endlessly curious about human interactions.

The three synthesis pieces above are illustrated through the stories and further analysis in Chapters Four and Five under the key themes of being present, and vulnerability and courage.

Being Present

The co-researchers' stories in Chapter Four illustrate a number of themes related to the meaning of 'making magic,' facilitating collaborative processes, in particular the notion of being present. They illustrate the fundamental meaning of magic as transformation. Transformation is the change from a group of individuals to an interconnected whole and/or the transformative learning of participants and of the facilitators themselves. This transformation happens through the collaborative processes where people become present with each other and make interpersonal connections in order to accomplish tasks.

The stories illustrate the holistic nature of what we do as facilitators, which impacts both our strategies and who we are as facilitators, our presence. We create spaces where our spirits can meet through these connections of authentic selves and we do this by bringing intellectual, physical, and emotional strategies to create these magical (spiritual) spaces. Our stories illustrate how we create these spaces by being present ourselves, using our minds, bodies, emotions and spirits, and through being intuitive, creative, caring, energetic, engaging, centred, vulnerable and courageous.

Our stories also illustrate a variety of structures and strategies that we use to create these sacred spaces, safe learning spaces for participants to take risk. The stories in this chapter

illustrate the appropriate fit between strategies and ways of being, and the context and content of the particular sessions. Our stories illustrate our creativity and intuition in the use of a variety of resources and in responding appropriately to participant needs to allow both facilitator and participants to be present.

Vulnerability and Courage

Although we strive for magic it is often very challenging and may not happen. Chapter Five illustrates challenges of striving to 'make magic' through further co-researchers' stories and analysis under the key themes of vulnerability and courage. Challenges included are working with conflict, dealing with our own fears and failures, and making choices.

Facilitators may feel fear going into sessions, not knowing whether the magic will happen, being vulnerable to a variety of forces outside their control, and yet having courage to carry on, to strive to 'make magic.' In this inquiry we co-researchers shared stories of our fears and failures and in doing so, made ourselves vulnerable to each other, allowing us to be more present with each other. The notion of being present as authentic selves is the overarching quality of 'making magic.' We strive to be present by being centred in the holistic nature of what we do, reflecting on both successes and challenges. 'Magic makers' strive to be real and authentic, and use facilitator tools and techniques in order to create spaces for people to be real and authentic in community with each other, working collaboratively together. It is challenging work.

This study inquired into the literature that informs 'making magic,' facilitating collaborative processes, in particular, appreciative inquiry and transformative education. The findings of this study contribute to both of these areas of literature.

This study is an example of an appreciative inquiry and the co-researchers use appreciative inquiry in their practices of 'making magic.' Appreciative inquiry is a research methodology, a human system development tool and perspective for everyday living that focuses on (inquires into) what is working well in order to grow (appreciate) it. Appreciative inquiry creates opportunities for people to interconnect by being more fully present with each other through collaborative storytelling and analysis that provide the container for magic, the transformation of the human system, which can be individual, group, organizational and/or societal change. 'Making magic,' like appreciative inquiry involves creativity, imagination, and appreciation.

However, the appreciative inquiry literature does not explore the impact on people's ability to be appreciative and to be appreciated, of differences in power and privilege based on race, class, gender, sexual orientation, ethnicity, age and other social structures. The transformative education literature provides the critical lenses from transformative learning theory and notions of cultural influences. Transformative learning involves critical reflections that result in realizations and transformations of habits of mind. Cultural influences are important to consider when working with diverse groups, to get

them to be appreciative of each other. It is important that facilitators create spaces where cultural diversity is valued and to do this they could use strategies such as Wlodkowski (1999) suggests for culturally responsive teaching. Culture and systemic oppression impact people's privilege and power. It is the intersections of all of our diversities and those of our participants that impact who we are, and our ability to be present with one another.

The findings of this study agree with the transformative education literature that argues for a more holistic view of teaching and learning, where sacred spaces are created that take into consideration the spirit and emotions as well as the intellect and body, as O'Sullivan (1999) suggests, "educators must take on the concerns of the development of the spirit at the most fundamental level" (p. 259). English et al. (2003b) "believe there is room for a spiritual literacy" (p. 142). Sacred spaces are culturally responsive spaces, that respect the diversity of who people are and allow both facilitator and participants to show up, to be present and authentic with each other. Facilitators intentionally create these spaces for the possibility of magic through a variety of strategies, and by being present themselves, being who they are, as they facilitate. Throughout the process facilitators are attentive to inviting participants to be present themselves in order to work together in an interconnected way for the possibility of transformative learning, individual and/or group. As Tisdell (2003) states one of the elements for the possibility of transformative learning is "an emphasis on authenticity (both spiritual and cultural)" (p. 212).

This study contributes to the theory of facilitating collaborative processes, appreciative inquiry and transformative education by concluding that processes that combine the appreciative and the critical, critical appreciative processes, could enhance the possibility of magic, the transformation that happens when groups of people collaborate, work together, effectively.

Implications for Facilitator Development

In this section I present two implications for facilitator (faculty, teacher, trainer, group leader) development. One is to teach facilitators about the importance of critical appreciative processes, including the importance of looking for what is working well, appreciating, and being critical of the social structural limitations to power and privilege, and therefore one's ability to appreciate and to be appreciative. In other words, for the possibility of magic, facilitators need to create sacred spaces where participants are appreciated and respected for their differences, and where social structural impacts such as gender, race and class are acknowledged and challenged.

The second implication of this study for facilitator development is the importance of providing opportunities for facilitators to reflect on both who they are, their identities, and what they do, their techniques, as they facilitate. Both of these are essential to being present as we facilitate and to invite our participants to be present too.

In my own development as a facilitator, this inquiry has led me to continue reflecting on and developing my facilitating practice, to read, to attend workshops, to talk to other facilitators about both the who and the what of facilitating. There is so much more to learn. Facilitator development is a life long process and that is an important concept to impart when training new facilitators, and for ongoing professional development of experienced facilitators. It is important to have spaces where facilitators can tell their stories and delve into their experiences, to reflect and grow.

In particular, it is rare for facilitators who are independent consultants to have opportunities to talk frankly and deeply about facilitation successes and challenges. I think more sacred spaces should be created to allow opportunities for these kinds of profound conversations. For example, this could be done through workshops, like *The Labyrinth and the Art Leadership*, and groups, like the Vancouver Appreciative Inquiry Network. In the former, silence and walking meditation interspersed with facilitated dialogue among participants provides for the possibility of these conversations. The Vancouver Appreciative Inquiry Network is another example of a reflective space for facilitators. The group meets once a month and responsibility for the meeting facilitation is rotated around the group to whomever chooses to volunteer. Meetings are usually co-facilitated. We play with and practice notions of appreciative inquiry, intermingled with the wealth of other notions from our facilitation practices, which include a variety of backgrounds such as organizational development, education and training, and coaching.

Implications for Further Research

In this section I present three implications for further research. The first is the need for further research into different kinds of facilitation practices and research with facilitators from culturally diverse backgrounds. In this inquiry I chose other consultants who work in similar practices to mine. It would be interesting if other facilitators of collaborative processes, coming from other kinds of practices, explored the foundations of their practices through narrative inquiry. All of the co-researchers are white, middle class, well educated, and able bodied. It would be interesting to read stories, inquiries into practices of facilitators who come from more diverse backgrounds and to explore the impact of social structures such as gender, race, class, and ability on facilitating practice. It would also be interesting to explore how the metaphor of 'making magic' translates across different cultural contexts.

The second implication for further research is the need to continue to use appreciative inquiry as a research methodology and to enhance it with critical perspectives, that is, to use a critical appreciative approach. Appreciative inquiry provided a powerful framework for this inquiry and could do the same for other research into human systems of varying types. The power in using appreciative inquiry is in the safety and respect it provides for participants, being appreciated for what they do well, to delve deeper into the riskier, vulnerable conversations as we did. There could be expanded applications of appreciative inquiry as a research method in further explorations of facilitating collaborative processes by including the critical notions examined in transformative education.

Research using a critical appreciative process could examine more fully the impact of power and privilege only touched on in this inquiry. We hinted at it through our stories, especially mine. I think it would be interesting to explore these notions further. They are part of my practice and have been included here because they impact my work. I suggest that they impact others' work as well. In particular, I would like to explore and develop further the notion of critical appreciative processes, intentionally asking facilitators how they apply both appreciative and critical lenses to their work of facilitating groups.

The third implication for further research is interconnected inquiry, the possibility of researchers connecting from one study to another as happened in this inquiry. One of the co-researchers, Sandy, connected what happened with our magical group to his inquiry into trust building in groups. He wrote the story of our collaborative conversation as an example of group trust building and used this story in his focus groups to help them get started in their own storytelling. He also applied his model of group trust building to an analysis of our group process. It was profound to see our work carrying forward into his inquiry because building group trust and 'making magic' are both about what facilitators do and who we are as we do it. I would hope that other researchers would delve into these very important notions. For myself, I continue to inquire by reading and trying out ideas, in order to grow in my understanding of 'making magic.'

Impact on my Practice

The two major impacts on my practice of 'making magic' are, firstly, the feeling of being much more grounded in myself, more authentic, more present as a facilitator, who I am, and, secondly, the deepening of my tool kit, the increase in my resources, conceptual and applied. Both of these impacts allow me to be more confident in the work I do, to have faith that magic will happen, to forgive myself if it does not happen, to allow myself to be vulnerable and to have the courage to keep striving for magic. I am stronger in my location and my belief in the power of being who I am as I facilitate, trusting in the critical appreciative process, trusting in the structures, the caring, compassion and serious playfulness I bring to my work. I create spaces where human spirits/souls can interact with each other. I am appreciative of the diversity of my participants and critical of the social structures that impact them. I create spaces where people can be who they are, appreciated for who they are, appreciating each other for who they are. These spaces are places of possibility, the possibility of transformative learning and of 'making magic.'

As a result, more work is coming my way especially in facilitating groups and teaching courses in appreciative inquiry, leadership and facilitation skills. All sorts of interesting possibilities are opening up and developing further. I feel, like Palmer (2000), that I have found my inner calling, my vocation that is "a gift to be received" (p. 10). The following story is an example of the kind of work that I am passionate about and my inner voice is calling me to do.

Does that always happen?

After handing in the first draft of my thesis, I facilitated an appreciative inquiry and community development workshop for federal government employees to introduce them to some basic appreciative inquiry concepts and models to use in their work with First Nations' communities. It was a lot to do in four hours. None of the participants were First Nations. Four participants were 'trainees,' expected to be there as part of their job training. The rest of the group included their supervisor, the trainer who had hired me, and two others who worked in the team in other capacities and who were interested in the topic. I could sense as the 'trainees' came into the room that some of them were not keen to be there. "Oh, dear," I thought, "this will be a challenge," feeling a little nervous about how they might receive me. I introduced myself (and my wand) and proceeded to build an appreciative climate. I presented some theory then they did appreciative interviews and group development of provocative propositions and images around the topic of working with First Nations' groups. I talked about the impact of power and privilege on people's ability to be appreciative. Throughout the session, I told stories and they told stories, stories of our experiences working with First Nations' groups. The transformation to a more engaged and connected group began in the climate setting and increased through the interviews gaining further momentum in the group work, and was fully apparent in the whole group debrief and closure. In the closing circle, passing my magic wand around, each person spoke in a very emotional way about the power of the experience and their appreciation of each other. So I wasn't surprised when Mary, who had hired me, called me later and asked incredulously, "does that always happen?" She was amazed by how much had happened, all the original outcomes and, more powerfully, the unexpected outcomes, the depth of emotions that people shared and the transformation of the group to an interconnected whole.

"How wonderful," I thought to myself, "she saw the magic."

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Letter of Initial Contact

[Letter head]
[Date]

Letter of Initial Contact for Participants
Project Title: "Making Magic: Facilitating Collaborative Processes"

Dear _____,

My name is Jeanie Cockell. I would like to invite you to become part of a research project that aims to examine 'making magic' which I define as a metaphor for facilitating collaborative processes with groups in workplace and/or classroom settings. ` I am currently a graduate student at the University of British Columbia, completing requirements for a Doctor of Education degree. Also, as an educational/organizational consultant I am very interested in having a conversation with other consultants who facilitate collaborative processes.

The purpose of this study is to examine the "magic making" work of myself and other educational/organizational consultants in order to gain a better understanding of the meaning and value of this work.

This research on 'making magic' will explore and reflect upon:

- the meaning of facilitating collaborative processes in workplaces and classrooms
- how and why I and other consultants facilitate collaborative processes
- our peak experiences facilitating collaborative processes
- what sustains us in our practice of facilitating collaborative processes
- the relationship between the conversations in this research and the literature in business and education regarding facilitating groups.

This research will be conducted in three stages.

Stage One:
- I will interview three educational/organizational consultants and be interviewed myself using the same interview questions. These interviews will be audio taped and transcribed with the consent of the participant.
- I will send the transcriptions of the interviews to the participants for review.

Stage Two
- I will analyze the transcripts for themes and present these themes by illustrating each with snippets of stories, others' and my own.
- I will send a draft of this analysis to the participants and invite the participants to engage in a collaborative e-mail conversation (focus group) of what we are discovering. The conversation could include more stories, identification of other themes, and feedback on my themes.

Stage Three
- In the final analysis I will use the conversations from Stage Two to re-write the collaborative findings, weaving the stories and themes together. I will send the final analysis to the group for any final comments and/or concerns.

The data from the interviews in Stage One will be held confidential unless participants give permission for it to be attributed to them. In Stage Two the focus group will be introduced to each other over e-mail and will be invited to engage in a collaborative conversation to reflect on the themes and stories arising from the interviews and to share further stories and ideas. Due to the collaborative nature of this research, participants will be known to each other. The data in Stage Two will be held confidential outside of the focus group unless participants want it to be attributed to them. Participants in the focus group will be encouraged to refrain from disclosing the contents of the discussion outside of the group; however, what other participants do with the information discussed cannot be controlled.

I am currently seeking three educational/organizational consultants to take part in this research. In particular, I am seeking consultants who facilitate collaborative processes and who are interested in reflecting on the meaning and value of these processes. If you choose to participate in this research, Stage One will require approximately 1.5 hours of your time for a semi-structured interview and approximately another 1 hour to review and respond to the transcript. Stage Two will require approximately 2 to 6 hours over a month of facilitated e-mail dialogue with the other participants. Stage Three will require approximately 1 hour to review the final analysis. Data provided by participants will be kept anonymous unless permission is granted for the data to be attributed. All participants in this research will have the opportunity to review the sections of the research that they have contributed to, provide feedback and withdraw any sections that they are not comfortable with. Also, if at anytime a participant wishes to withdraw his or her contribution to the research they may do so. If participants wish to remain anonymous,

each participant will receive a pseudonym and transcriptions will be coded to ensure that both confidentiality and anonymity are maintained.

Dr. Shauna Butterwick, Assistant Professor, Department of Educational Studies (Ponderosa G, UBC, V6T 1Z4, 604-822-3897 shauna.butterwick@ubc.ca) is my research supervisor and can be contacted should you have any concerns regarding the undertaking of this research. If you have any concerns about your treatment or rights as a research subject, you may contact the Research Subject Information Line in the UBC Office of Research Services at 604-822-8598.

Thank you in advance for your time, I will be contacting you in one to two weeks to answer any questions you may have and inquire regarding your willingness to be part of this study.

Sincerely

Jeanie Cockell
3578 Fleming St.
Vancouver, BC
V5N 3V8
604-879-2585
jeancockell@shaw.ca

[Letter Head]
[Date]

Letter of Consent
Project Title: "Making Magic: Facilitating Collaborative Processes"

Dear _____,

My name is Jeanie Cockell. I am currently a graduate student at the University of British Columbia, completing the requirements for a Doctor of Education degree.

Thank you for indicating your interest in participating in my project, *Making Magic: Facilitating Collaborative Processes*. The purpose of this study is to examine the 'making magic' work of educational/organizational consultants in order to gain a better understanding of the meaning and value of this work. For the purposes of this study 'making magic' is defined as a metaphor for facilitating collaborative processes with groups in workplace and/or classroom settings. In particular, 'making magic' refers to the best or peak experiences when facilitating collaborative processes.

This research will be conducted in three stages.

Stage One:
- I will interview three educational/organizational consultants and be interviewed myself using the same interview questions. These interviews will be audio taped and transcribed with the consent of the participant.
- I will send the transcriptions of the interviews to the participants for review.

Stage Two
- I will analyze the transcripts for themes and present these themes by illustrating each with snippets of stories, others' and my own.
- I will send a draft of this analysis to the participants and invite the participants to engage in a collaborative e-mail conversation (focus group) of what we are discovering. The conversation could include more stories, identification of other themes, and feedback on my themes.

Stage Three
- In the final analysis I will use the conversations from Stage Two to re-write the collaborative findings, weaving the stories and themes together. I will send the final analysis to the group for any final comments and/or concerns.

The data from the interviews in Stage One will be held confidential unless participants give permission for it to be attributed to them. In Stage Two the focus group will be introduced to each other over e-mail and will be invited to engage in a collaborative conversation to reflect on the themes and stories arising from the interviews and to share further stories and ideas. Due to the collaborative nature of this research, participants will be known to each other. The data in Stage Two will be held confidential outside of the focus group unless participants want it to be attributed to them. Participants in the focus group will be encouraged to refrain from disclosing the contents of the discussion outside of the group; however, what other participants do with the information discussed cannot be controlled.

As a participant in this study I will be asking you to:
1. participate in a semi-structured interview about facilitating collaborative processes
2. review your interview transcript in order to add and/or delete any data
3. review the preliminary analysis of the data and participate in a collaborative e-mail conversation (focus group) with the other participants regarding the findings
4. review the final analysis for final comments and/or concerns

Stage One will require approximately 1.5 hours of your time for the interview and approximately another 1 hour to review and respond to the transcript. Stage Two will require approximately 2 to 6 hours over a month of facilitated e-mail dialogue with the other participants. Stage Three will require approximately 1 hour to review the final analysis.

Your participation in this study is entirely voluntary. Data provided by you will be kept anonymous unless you consent to have it attributed to you. Each participant who wants to remain anonymous will receive a pseudonym and the transcriptions will be coded to ensure that both confidentiality and anonymity are maintained. You will have an opportunity to review your contributions to the research; provide feedback and withdraw any sections that you are not comfortable with. Also, if at anytime you wish to withdraw your contribution to the research you may do so without experiencing any penalty or negative consequences. You do not waive any of your legal rights by signing this consent form.

Dr. Shauna Butterwick, Assistant Professor, Department of Educational Studies (Ponderosa G, UBC, V6T 1Z4, 604-822-3897 shauna.butterwick@ubc.ca) is my research supervisor and can be contacted should you have any concerns regarding the undertaking of this research. If you have any concerns about your treatment or rights as a research subject, you may contact the Research Subject Information Line in the UBC Office of Research Services at 604-822-8598.

Please sign if you prefer to be anonymous.

I wish to remain anonymous throughout the study except for my identity being known to the others participating in the collaborative e-mail discussion.

_____

Print Name   Signature   Date

Please fill in and sign if you wish your data to be attributed to you.

As well as my identity being known to the others participating in the collaborative e-mail discussion (focus group), I wish (please check):

- all my data to be attributed to me   _____
- only the following of my data to be attributed to me,
  Stage One – interview data   _____
  Stage Two – responses to initial analysis   _____
  Other – please be specific   _____

  _____

  _____

  _____

_____

Print Name   Signature   Date

At any time you may change your consent, that is, if you initially chose to be anonymous you may change to having your data attributed to you or if you initially chose to have your data attributed to you may change to being anonymous.

Your signature below indicates that you have received a copy of this consent form for your own records.

Your signature indicates that you have read and understood the requirements and procedures of the study and that you consent to participate.

_____

Print Name   Signature   Date

Thank you very much for being willing to undertake this research with me. It is my hope that this research will contribute to our practice as facilitators of collaborative processes.

Jeanie Cockell
3578 Fleming St.
Vancouver, BC, V5N 3V8
604-879-2585, jeancockell@shaw.ca

APPENDIX B: INTERVIEW QUESTIONS

Background questions:

1. I would like you to start by describing your consulting practice.

2. How and why did you get into consulting?

Questions regarding the meaning of facilitating collaborative processes:

3. I am particularly interested in your practice of facilitating collaborative processes. How would you define collaborative processes? How do you facilitate collaborative processes? (Techniques? Where? Who with?) How long having you been doing this work?

4. I use the metaphor, 'making magic,' to describe what I try to do when facilitating collaborative processes. What metaphor(s) do you use?

Appreciative Inquiry questions:

5. Tell me a story of one of your peak experiences 'making magic' (insert interviewee's metaphor, probe for descriptions, experience, feelings, thoughts at the time).

6. What do you value most about yourself as a "magic maker" (insert interviewee's metaphor)?

7. What is your ideal vision of yourself as a facilitator of collaborative processes?

8. What do you want to do more of?

Questions regarding the value of facilitating collaborative processes:

9. What is the value of using collaborative processes?

10. Why do you choose to facilitate collaborative processes in your practice?

Questions regarding sustaining practice:

11. What strategies have you used when facing challenging moments facilitating collaboration?

12. What sustains you in your practice of facilitating collaborative processes?

APPENDIX C: COLLABORATIVE CONVERSATION E-MAILS

Initial e-mail February 13, 2004

Hi Glynis, Leslie, Liz and Sandy,

Thank you all very much for your contributions to Stage One of my study – the interviews and your review of the transcripts. You've given me wonderful stories to work with. I admire you all for your passion and commitment to facilitating collaborative processes.

In Stage Two we will engage in a collaborative conversation around my initial analysis of Stage One. I am in the process of writing that analysis – pulling out the themes and stories from the five interviews, yours and mine. Rather than waiting until I have completed the draft analysis to start our conversation, I thought we could get started by setting our agenda and creating a space for us to feel comfortable participating fully in this conversation.

These are my proposed Stage Two time lines for our collaborative conversation:

February 13 – 23	Get to know each other, respond to the points below in this e-mail.
February 23 – March 8	Respond to the draft analysis that I will send to you by Feb 20. Dialogue regarding the themes and stories – more stories, identification of other themes, feedback on my themes.
March 8 – 15	Wrap up the conversation.

In Stage Three I will do the final analysis using the conversation from Stage Two to re-write the collaborative findings. I will send you this for a final review.

Please respond to us all regarding the following:

1. Do the Stage Two time lines above work for you? If yes, that's great! If not, let us know what would work for you.

2. Introductions – introduce yourself including a brief description of your consulting practice, why you are interested in participating in this study and anything else that you would like to share with the group.

3. Agreements –let's develop our agreements for working collaboratively together. What interpersonal process agreements (ground rules) would make this conversation work well for you?

4. Expectations – what expectations do you have of this collaborative conversation?

Please contact me at 604-879-2585 or by e-mail if you have any concerns about participating in this research.

I am looking forward to collaborating with you all in this conversation. Thank you very much. Wish me well in my writing. If only I could wave my magic wand and it would all be done?!

Jeanie

Some Magic Pieces for You – February 22, 2004

Hi Glynis, Leslie, Liz and Sandy,

I hope you are all enjoying beautiful weather in your parts of the world. (maybe not you, Sandy, if you are still back east). It's lovely here in Vancouver.

This past week I've been immersed in the interview data, reading, writing and thinking. It's been good to have a dedicated week for this.

In my first e-mail I had promised to send you a draft analysis by Feb. 20th for you to respond to. In working with the data I've decided to send out pieces for you to interact with in our collaborative conversation about the meaning and value of making magic. I invite you to do any of the following: make comments; ask questions; analyze; write stories and/or poems; share ideas, resources, and techniques for how to make magic.

Attached are: a brief synthesis of our shared notion of magic; a poem I wrote after reading all your transcripts; and snippets from our peak experiences. In each I've included a prompt that I invite you to respond to.

I've also attached my own introduction, suggestions for agreements and expectations. We are still in that piece of the process. Once we know everyone's time constraints I'll re-work the timelines.

You've given me so much already, thank you. I look forward to more!

Jeanie

Summary and Directions – March 9, 2004

Hi Glynis, Liz, Leslie and Sandy,

As promised here are some of our themes so far and directions for moving us along on this quest for a deeper understanding of the meaning and value of magic making.

So far:
Some of the themes that resonate for me are engaging the group; using all our senses including the 6th sense, intuition; freeing people to show emotions publicly and showing ours where appropriate; challenging our people to go outside expected boundaries and creating safe space for them to do so; taking risks ourselves; having faith (willing suspension of disbelief); being fully present with passion and skills, full-heartedness; inviting others to be present, free to express themselves; weaving multiple layers of knowledge and practice; being imperfect; being purposeful; co-creating synergy; and creating space for transformative learning, individual and group . What have I missed?

Reflecting on the interviews and our conversation so far, I think we work holistically, with the physical, intellectual, emotional, and spiritual dimensions of ourselves and our people. We use physical and intellectual structures (exercises, agendas, theories, space) to create a space for their whole selves (emotional, spiritual as well as physical and intellectual) to be engaged and present.

Moving along:
This thesis is based on narrative inquiry so I invite you to continue to inquire narratively. At the core of the inquiry are my stories. Your stories are helping me dig deeper into these. The purpose of this inquiry is not to come out with a unified understanding of the meaning and value of making magic but to glimpse into the magic.

I invite us to "peek into our peak experiences," to glimpse into the magic. Tell us a story, a snippet of a peak experience of making magic. What is it that made this peak for you? Tell as many stories as you have time and energy for.

I also invite us to keep bouncing ideas and questions around; to share favourite facilitating strategies; to tell stories about the challenges of making magic; to talk about why we do this.

Thanks,
Jeanie

ps Liz, sorry to hear that you still haven't been feeling well.

Continuing & Closing Our Conversation – March 21, 2004

Hi Glynis, Leslie, Liz, Sandy,

I'm looking out my office window at the cherry blossoms in my backyard which are starting to fall – their beauty is so temporary, pink against the pale blue sky beyond… Thinking about our conversation and that we will be closing and moving on soon…

I think we are digging into stuff that is most often left unsaid, our failures (catalysts for learning), our struggles with appropriate disclosure, vulnerability, and passions - the emotional/spiritual elements of our work. How do we know when and how much to disclose of ourselves?

I'm facilitating a 2-day training session at the JI tomorrow and Tuesday. I have done this one several times and it's always magical. I still feel the fear going in. This time I've agreed to take more participants than usual so I'm tweaking the structure (they do mini-lessons) to get it all in, wondering how much I can tweak and still have magic happen. Is the structure important but not as important as bringing myself in, vulnerable, having faith, being present…?

Next Monday, March 29th we are meeting at 6pm at my place for snacks, more conversation and our closure. Here is my suggested structure for the evening:
- connect together, starting with snacks and reviewing the process to date and for the evening
- do a circle round where each of us can speak (or pass) and will be listened to by the others without interruption
- open up the conversation
- close with a final circle.

I think the circle process will create a container where we can tell stories, ask questions, facilitate dialogue, make magic together…

Please bring whatever you'd like to the evening. If you want to facilitate part of the evening, share facilitation stories/strategies that would be great or if you want to just arrive and respond in the moment that's great too.

I'm really looking forward to being present in person together!

Thanks,
Jeanie

APPENDIX D: INTERPRETATIONS

Brief Synthesis of Making Magic

> Jeanie's prompt:
> Below is a brief synthesis from my analysis of the interview themes using three key questions. What are your answers to these questions and/or comments on my synthesis?

1. What is the meaning of 'making magic,' facilitating collaborative processes?

Facilitating collaborative processes is working with groups, learning groups or workplace groups, to get them to work together better. When the magic happens in this collaborative process the group becomes more than the individuals put together. The group becomes an interconnected whole. Magic is this transformation, the alchemy that happens when the people in the group are interconnected and authentic with each other.

2. How do we do it?

We facilitators of collaborative processes provide the group with structures to work together to achieve an outcome. The outcome may be a particular product and/or it may be a process which enables the group to work better together in an ongoing way. We magical facilitators use the skills that we have developed over our years of facilitating in different settings. Although we plan structures, we know when to modify those structures to be able to respond to the group's needs. We build structures with the group. For example, we work collaboratively with a group to set guidelines that all would agree to that would make it a successful collaborative experience. We are all experienced facilitators who draw on our learnings from both successes and challenges that we have had over the many years of our magic making practice, as well as the theoretical learnings from reading and studying in the diversity of our fields - education, communication, arts, administration, social work, tourism.

We strive to be authentic, genuine, have integrity, and bring our whole selves to this work. We create structures to enhance the individuals in the groups to do this as well. Showing up, being present, bringing themselves to the group is a big step along the way to successful collaboration and interconnection. We create climates where the differences and diversities amongst the individuals in the groups are celebrated and build on the different strengths.

3. Why do we do it?

We do this work because we believe that by working with our groups to learn how to work together better, more collaboratively, we will impact the larger world. The impact of the transformations that we facilitate will ripple out into the larger world. We have social responsibility to make a positive difference in the world. The work we do is about the group, not about us. It is their magic that we intend to facilitate.

We make magic because it gives us joy. We are creative and courageous. We work hard, play, have fun, feel the joy that it brings us, as well as the group. We are continual learners ourselves, endlessly curious about human interactions.

Brief Synthesis of Making Magic – Revised

> Jeanie's prompt:
> Below is a brief synthesis from my analysis of the interview themes using three key questions. What are your answers to these questions and/or comments on my synthesis?

1. What is the meaning of 'making magic,' facilitating collaborative processes?

Facilitating collaborative processes is working with groups, learning groups or workplace groups, to purposefully guide them towards, and to make it easy for them to achieve their intended outcomes. These outcomes may include a plan, re-organization, individual learning, group learning and/or strategies for getting along better. Along with the intended outcomes may come unintended outcomes such as better working relationships, understanding of the root causes of problems, or alternate outcomes revealed through the process.

When the magic happens in this collaborative process the group becomes more than the individuals put together and/or the group process aggrandizes the learning. The group becomes an interconnected whole. Magic is this transformation, the alchemy that happens when the people in the group are interconnected and authentic with each other.

2. How do we do it?

We facilitators of collaborative processes provide the group with structures to work together to achieve an outcome. The outcome may be a particular product, individual learning and/or it may be a process which enables the group to work better together in an ongoing way. We magical facilitators use the skills that we have developed over our years of facilitating in different settings. Although we plan structures, we pay attention to the needs of the group and of the individuals within the group in order to discern how to best modify those structures in response to those needs. We build structures with the group. For example, we work collaboratively with a group to set guidelines that all participants agree would make a successful collaborative experience. We are all experienced facilitators who draw on our learnings from both successes and challenges that we have had over the many years of our magic making practice, as well as the theoretical learnings from reading and studying in the diversity of our fields - education, communication, arts, administration, social work, tourism.

We strive to be authentic, genuine, have integrity, and bring our whole selves to this work. We create structures to enhance the individuals in the groups to do this as well. Showing up, being present, bringing themselves to the group is a big step along the way

to successful collaboration and interconnection. We create climates where the differences and diversities amongst the individuals in the groups are celebrated and build on the different strengths.

3. Why do we do it?

We do this work because we believe that by working with our groups to learn how to work together better, more collaboratively, we will impact the worlds in which our participants reside in a positive constructive way. We hope that the impact of the transformations that we facilitate will ripple out into the larger world. As the co-researchers discussed, we have social responsibility to make a positive difference in the world. The differences we hope to make would be people taking into their own contexts the practices of being present, interconnected and caring. In doing so, we hope those contexts will be transformed to more magical places where people's hearts, souls, and minds are all present. The work we do is for the needs of the group and the individuals within the group. It is their magic/learning that we intend to facilitate. It is of value to them. Along the way we are part of this magic. We learn and are transformed by the magic. It is also of value to us.

We make magic because it gives us joy. We are creative and courageous and believe in the creativity and courage of our participants. We work hard, play, have fun, feel the joy that it brings us, as well as the group. We are continual learners ourselves, endlessly curious about human interactions.

Peak Experiences

> Jeanie's prompt:
> What do these snippets from our stories say about magic?

Jeanie: My mom was dying when I started teaching my first course at UBC. After struggling with whether I should teach or stay with my mom, I decided to teach the class. I funnelled all my energy in order to do the things I do in a first class to establish a climate for magic – getting to know each other, establishing our guidelines for working together, hearing their expectations, clarifying course requirements and structure. I was high energy and lots of fun. People went away eager to return. I said nothing about my mom. The second class was a week later and meanwhile my mom had died. I felt like a truck had run over me and I couldn't imagine how I would teach this second class. There was no reserve in me. I was in tears driving out to the campus. Within moments of the beginning of class I knew that I had to share what was happening in my personal life to be authentic in facilitating this class. So I told them about my mom dying and how that might affect how I would be in class, connecting my story to the content of this class on teaching perspectives. Sharing my inner, private self was very powerful. The students were moved and we were able to continue on. It was a magical class all the way through to the end of the term.

Sandy: I facilitated a Strategic Planning process for the organization I work with in Texas. We did something that was a key part of the process. We held a funeral. This is something I've done fairly rarely and only in exceptional circumstances. In this case it worked. I set up the room like a darkened funeral room lit by candles. When everyone was in the room and seated around a rectangular table with a glass full of water or something alcoholic, their choice, we went around and made toasts. To make it safe, as in every round robin that I conduct, you can always choose to pass. Everyone that chose to participate made a toast to the old CEO and the old organization and then to the incoming CEO and the new organization. Some people kind of sloughed it off but most of the 20 plus people that we had in the room took it seriously. There were tears and there were hugs. The incoming chairman of the board who'd sometimes had difficult relationships with the outgoing chairman/CEO made a truly heartfelt statement after the thing was over. He was almost in tears talking about what he'd learned from him and how meaningful the relationship had been. In the end, it was really very dramatic and psychologically things changed in that room that night. The next morning, it was clear that the new CEO was now 'the' CEO in everyone's mind and heart.

Liz: I was teaching my interviewing skills class at UBC that I teach every Fall term and there was something about that class where it was a complete love affair. It's hard to describe what that means. It's almost like falling in love, the class with me and me with the class and I don't mean that in a sexualized way at all so what happened during the course was … they learned everything and more that I was trying to teach them. At the end they were the most incredible counsellors that I have ever taught. There was always laughter and there was always learning and there was application of learning and

challenging. What I did was I challenged them. They had to do role-plays with video camera and get feedback. Within the first class they were prepared to take risks and they created a safe environment for themselves. I created, we created a safe environment where they felt they could take risks very quickly. They weren't afraid to give each other feedback that was constructive. It was about their behaviour, their performance and it was not competitive. They shared with each other their own sense of self, who they were, what they wanted to become and in doing so they became it.

Leslie: I was facilitating the process of developing customer service standards for the corporation using focus groups of frontline people. Their managers participated in the process in silence at a table with duct tape on it to symbolize their role of just listening, no talking. I was developing agreements with one of the focus groups, a group of industrial men, when one participant suggested, "vulgarity is ok." I was taken aback at first and said, "do you mean we won't use any swearing in the room?" And he said, "no, that we can swear in the room." There were lots of nods of agreement around the room. I was surprised; usually agreements are sort of gentle, thoughtful, nurturing respectful things. So I asked them "what does that mean?" They said, "customers are always swearing so if we are telling a story we need to be able to swear to make the story real." And I thought, "what a broken organization and this is what they need," and said, "fuck." They didn't bat an eye so I built on what they were doing and said, "no shit?" and they said, "exactly." They needed to test me and to test that the silent managers at the back table were okay with this. I was facilitating two processes simultaneously, keeping my eye on the gasping managers as well as the nodding front line workers. We all passed the test and moved on to develop the standards in a very structured way.

Glynis: I was facilitating at a conference put on by a group of people from various not-for-profit organizations in our community who wanted to find ways to collaborate across the different sectors – arts and culture, social services, sports, and others. I used appreciative processes with them to explore the theme, "creating powerful connections." On the first evening of the conference they interviewed one another and worked in small groups to come up with provocative propositions that were amazing and inspiring. The organizers were threading the arts through the entire process. I would have liked the participants to add images to their propositions, but there wasn't enough time for this. During the planning phase, I talked about my disappointment with one of the organizers who offered to find a teacher in town who agreed to have her grade 6/7 class decorate the propositions that we created. I e-mailed the provocative propositions to the teacher that night at midnight and she wrote them on flip chart paper. Over the course of the next morning her students decorated them. I came in early so I could talk to and watch the children because I thought it was important to bring their energy back into the discussion at the conference. The flip charts were gorgeous. That afternoon, we papered the walls of the conference room with them and worked with them further in the second part of our process. People were really engaged, in part because of these unexpected artistic offerings. We were all excited that we had been able to bring the voices of the children into an adult conference in an unusual way. People were inspired!

Magical Facilitators

Feb. 16, 2004

> Jeanie's prompt: Below is a free form poem I wrote in my journal after I had read and pulled themes, ideas, stories from your transcripts. Just thought I'd share it with you. Feel free to share back.

Working with my data – reading interview transcripts,
      pulling out themes, words, ideas
      only mine left to go
      then write it up!?
We all care about what we do – we have passion for
      connecting people together, to get them to
      work, learn well together
      to be more than they are as separate
      individuals
We have fun, play games, laugh
      show videos, use toys
      draw
      Creating in all ways
      out of the box
Some of us are in love
      with the groups, people, the process
Transformation is key
      Magic is transformation
It's not about us
      facilitating – facile
      to make easy for those we work with
We facilitate
      They own the product
      it's their voices
      their decisions
We bring them together
      provide structure
      throw it away in order to
      respond to the moment
Trust the intuitive voice
      the teachable moments
      the process
      the people
Include all different people and
      ways of being
Use energy, feel the vibrations
      live on the edge, out of the box
Courage, heart, spirit, love
      What am I saying?
      We push the boundaries

Challenge the hierarchies
    which confine people
    to their boxes
    keep them separated
Human beings, people
    to be loved, listened to, heard
    cared for
    challenged to try new things
Give them theory, reasons for
    moving out of their comfort zones
Sustain ourselves with ourselves
    PD for our own inner reflections
    personal and professional development
    intertwined.
    thinking, writing, reading
    it's ok
    talking to valued colleagues and friends
Magic is indescribable
    but _is_
It doesn't always happen
    the challenges can be gifts
    magic is the ideal or
    is it?
Something less than magical just is
    steps along a journey
    passion to make the world a
    better place
    poof! wave the wand
    it's not that easy
Commitment to trying
    little transformations can
    ripple out to
    bigger ones
The world is made up of
    individuals
    seeking their own quests
    stuck in their stories
    not even knowing they're stuck
Facilitators – we have freedom
    to try
    to make a difference
    to continually learn and grow
    our toolboxes getting
    fuller and fuller
Not just intuition
    intuition coming from a
    full toolbox
    the signs are there
Learn to listen
Listen to learn.