Collaborative Inquiry on Behaviors that Broaden Awareness and Effectively Direct Attention

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By

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Collaborative Inquiry on Behaviors that Broaden Awareness and Effectively Direct Attention

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Abstract

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I facilitated an eight week Collaborative Inquiry research project with six members of an Alumni group holding diverse leadership roles. Influenced by Daniel Goleman's book *Focus* (2013), the purpose of the research was to enhance high performance leadership practice. The research group participated in four cycles of Action Research to enrich 'inner', 'other' and 'outer' awareness and practice directing personal and group attention. Methods to adapt habits and promote learning communities were articulated through the first half of the project, and then emphasis shifted to enabling transformation on a systemic level. Storytelling and scenario planning became keystone leadership practices the group experimented with and refined. This co-operative discovery connected theory to practice influencing an emergent paradigm of focus. New insights into leadership learning, development and transformation were produced. The research also informed how non-traditional educational communities can influence capacity development from the perspective of a rising generation of leaders.

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Introduction

Summary

This research project proposed and implemented experimentation with Collaborative Inquiry techniques meant to enhance young professionals' understanding and re-pattern their behaviors around high performance leadership practice. The Introduction section presents the research direction, explains the research questions in the context of 21st Century Leadership Theories, and identifies who joined the facilitator in this exploration. The Research Method section of this paper provides background information on Action Research and Collaborative Inquiry forms, as well as the key principles of Action Inquiry. Next, the Research Steps section highlights the procedures administered for effective research implementation. This is followed by the Research Narrative section, which outlines the cycles of research and what contributed to its unique progression. The final sections connect the project outcomes and insight into Action Research as an organization change processes, to global leadership practice implications and how these experiences have propelled the facilitator forward in life.

Context

The world is evolving with rapid technological emergence, shifting work environments and diverse professional styles. Leaders' capacities to practice effective awareness and focus in this 21st Century setting are stressed now more than ever. The volume and diverse forms of human communication, connection and sensory distractions will only grow over time. Developing a stronger understanding of focus and the behaviors and practices that ensure effective awareness are essential to exemplary 21st Century leadership practice.

Daniel Goleman (2013) in the Harvard Business Review describes attention as "the basis of the most essential leadership skills - emotional, organizational, and strategic intelligence. And never has our attention been under greater assault" (p. 60). The overwhelming amount of incoming data, limited self-reflection and the expectations of "just get it done" cultures dissuade recognition of the big picture. Goleman (2013) cites Herbert Simon's prediction from almost a half century ago, that "a wealth of information creates a poverty of attention" (p. 60). Personally and collectively, individuals and groups need to broaden their awareness and direct attention by evolving their behaviors and habits.

The Practice of Adaptive Leadership authors Ronald Heifetz, Alexander Grashow and Marty Linsky (2002) describe leadership as "an improvisational art" (p. 73). This is an essential philosophy to live by, now more than ever. We are growing into a future world that Price Pritchett (2013) in *New Work Habits for a Radically Changing World*, describes as "fluid, fuzzy, and fast" (p. iv) and suggests we need to adapt in a way that ensures we are using coming changes to our advantage. This environment is where the improvisational art of leadership lives and where the challenges and opportunities of tomorrow emerge.

This research project set out to connect theory to practice, and articulate ways professionals can most effectively broaden awareness and direct attention. The way leaders adapt understanding and practice depends on the unique organizational dynamics, the systemic shifts of the environment and its evolving needs and goals. "Tuning into systemic patterns and the construction of local inter-relationships, we are able to spot small opportunities for action that may open up unimagined possibilities for larger change" (Burns, 2007, p. 41). The ability to broaden awareness and direct attention are essential capacities desired to improvise leadership influence to not only meet the challenges of tomorrow, but thrive in future opportunities.

Opportunities the Research Addressed

In his book *Focus*, Goleman (2013) presents his concept "Triple Focus": the ability to acknowledge and diagnose multiple levels of awareness and harness this "hidden driver of excellence" (p. 236). Leaders are inspired to develop a Triad of Awareness in which they direct attention to self, other and outer. It encompasses self-management on the first, relationships to others on the second and the wider world or systems awareness on the third level. Attention to all three levels is necessary for leaders to manage both the short-term and long-term challenges presented in complex systems. Effective methods to direct personal and group attention could benefit many people struggling to balance and control their focus in this complex world.

The facilitator of this research project planned a "Collaborative Inquiry" forum, focused on how leaders can direct the attention of groups as a transformational leadership practice. The research team explored how personal habits can influence the broadened awareness necessary for high performance leadership and how group habits can influence effective attention and focus interdependently. Developing new language, behaviors and practices around broadening awareness and directing attention was instrumental to the emergence of a new paradigm of focus. Research participants cultivated new perspectives and skills for their personal practice, as well as group behaviors that influence others "to be more" (Popper, 2005, p. 114) by influencing these behaviors on an organizational level. This awareness and these skills allowed this group of professionals to instill high performance in themselves and the organizations they lead.

Purpose of the Project

This inquiry was meant to "re-vision" understanding on attention and focus and initiate new personal and group behaviors and practices. This understanding is essential for individuals

to be successful in this fast, technology-immersed environment with overwhelming amounts of information and distractions. Technology has "gone beyond what we are capable of handling" (Goleman, 2013, p. 44) and too often directs and re-directs attention to the "here and now", restricting professionals from balancing their focus and seeing "the big picture". This is an often over-looked skill, but one that is crucial for professionals to establish a clear vision for their organization and peers. There exists a significant challenge in connecting these visions to the daily awareness and attention of group members. For these reasons, this research emphasized the third dimension of the Triad of Awareness, the outer or systems level. "Great leaders must have the essential long view that a systems understanding brings. . . expand their focus to a further horizon line" (Goleman, 2013, p. 252).

New personal and group behaviors and habits can help direct attention from short-term technical problems to long-term adaptive challenges. The development of habits and behaviors can influence individuals and organizations to be adaptive. This research successfully connected many leadership theories, while articulating and assessing their application. The participatory research method was new to most researchers and invigorated this group of young professionals to support each other to continue personal and professional development in a virtual Community of Practice (Wenger-Trayner, 2014) setting.

Research Question

What behaviors and habits influence personal and group capacities that develop multi-level awareness and effectively direct attention?

Description of the Research Participants and Selection Criteria

Another purpose of this research project was to reconnect former members of a Fellowship program, in which the facilitator is an alumnus. The United States Golf Association (hereinafter USGA) Fellowship in Leadership and Service is a two-year program for recent college graduates, established to grow the game of golf through the organization's *Good for the Game Grants Initiative*. This research project engaged a small group of alumni of the Fellowship program, revitalizing its original mission of developing young professionals to be future leaders of their generation and value philanthropy in causes important to each Fellow and their respective communities.

The vision for this research project was to establish a Community of Practice among alumni of this program who would experiment with Collaborative Inquiry on this topic. Etienne Wenger-Trayner (2014) defines a Community of Practice as a "group of people who share a concern or a passion for something they do, and learn how to do it better as they interact regularly" (p. 1). Fellowship alumni strive to grow their leadership capacities and professional skills, and understand the importance of peer support in their development.

One of the instrumental parts of each Community of Practice is its "Domain". This is the identity of the group that implies a commitment to collective competence and interest in their work (Wegner-Trayner, 2014). This research project confirmed how this element of a collaborative group is very important and something to be emphasized in our professional lives. Heron and Reason (2006) describe a Co-operative Inquiry group as "a community of value, and its value premises are its foundation" (p. 151). These shared values substantially contributed to heighted engagement to this inquiry and the research question.

Literature Review of Sources Related to the Topic

This research was inspired by a few key sources that explore attention and habits of individuals and groups. Goleman (2013) proposes that attention is a primary task of leadership and presents its importance in the context of the Triad of Awareness. Professionals direct attention in three main buckets: focusing on ourselves, focusing on others and focusing on the wider world (p. 60). Focused leaders can command the full range of their attention: They are in touch with their inner feelings, they can control their impulses, they are aware of how others see them, they understand what others need from them, they can weed out distractions and also allow their minds to roam widely, free of preconceptions (p. 61). All these capacities contribute to being a well-rounded leader, however this research group planned to focus on outer awareness. Generating new vocabulary and meaning making around all levels of awareness and methods to direct attention to them would enhancing the leadership capacities of researchers and their peers.

As it relates to the purpose of this research project, Goleman (2013) identifies the tendencies of many professionals who too often "attend to the present. . . future focus becomes a luxury, waiting for current needs to be taken care of first" (pp. 250-251). These circumstances and predispositions demonstrate the need for individuals to embrace the Triad of Awareness. "There's a strong case that leaders need the full range of inner, other, and outer focus to excel - and that a weakness in any one of them can throw a leader off balance" (p. 224). To contest the distractions and overwhelming focus on themselves and others, professionals need intentional practices that expand views and direct attention to an extended horizon.

Most pertinent to the future-focused elements of the research questions, Goleman (2013) articulates how strategy can be seen through the lens of our attention. "When leaders choose

strategy they are guiding attention" (p. 211). He explains strategy as having two main elements; exploitation of your current advantage and exploration for new ones.

> The exploration requests a deliberative cognitive effort to disengage from that routine in order to roam widely and pursue fresh paths. To sustain the outward focus that leads to innovation, we need some uninterrupted time in which to reflect and refresh our focus . . . alternating between concentrating intently on the problem and letting our minds wander freely. . . Exploitation is accompanied by anticipation and reward while exploration demands intentional focus. . . The first movement to the new territory entails disengaging from pleasing routine and fighting the inertia of ruts; this small act of attention demands what neuroscience calls "cognitive effort." That effortful dab of executive control frees attention to roam widely and pursue fresh paths. (Goleman, 2013, p. 220)

This narrative connects routines and habits to the capability to direct attention through cognitive effort. To do this effectively professionals must shift their focus from the short-term demands and technical concerns, and complement this awareness with those serving long-term adaptive challenges and affecting the sustainability of organizations. "Attention tends to focus on what has meaning-what matters. . . Leadership hinges on effectively capturing and directing the collective attention" (p. 210).

A deeper understanding of habits is needed to appreciate the ways personal and group routines can impact individuals and guide group attention towards vision and strategy. Charles Duhigg (2012) in his book *The Power of Habit*, illuminates the influence habits can have on personal and group development, aligning evolving visions with the needs of the ever-advancing world. In a fundamental sense, habits have a three-step loop, which includes "the cue, the routine, and the reward" (p. 139). Duhigg also articulates a "Golden Rule" as the most powerful tool for creating change. "To change a habit you must keep the old cue, and deliver the old reward, but insert a new routine" (p. 140). In the context of this Action Inquiry, the cue was the researchers' prioritized purposes and the new routines were meant to serve these purposes. At

this step, researchers identified habits that aligned with the organization's prioritized purposes. Ultimately, sustaining organizational excellence is the reward that 21st Century leaders seek.

The routine must evolve to be innovative and effective in the changing environment. Duhigg (2012) expands this concept further, suggesting these capacities are influenced by "central pattern generators" (p. 504) guiding decision-making and habits. Professionals must be conscious of these forces and understand that in order to modify a habit you must decide to change it. . . identifying the cues and rewards that drive the habits' routines, and find alternatives" (p. 534). This foundational understanding on the power of habits and effectively directing attention among this research group made the inquiry more fruitful and purposeful.

Literature Review of Sources Related to Leadership

From the commencement of this project it was clear that creating new insight around re-directing attention to outer awareness would be a significant task. Before approaching this challenge, it is important to acknowledge the complex systems that professionals and organizations exist within. System Theorists describe large systems and interactions between systems as ultra-complex and chaotic. "Self-organizing, nonlinear, feedback systems are inherently unpredictable. They are not controllable" (Meadows, 2008, p. 167). Although "the future can't be predicted, it can be envisioned and brought lovingly into being. Systems can't be controlled, but they can be designed and redesigned" (Meadows, 2008, p. 169). The inability to control and predict systemic changes accentuates the significance of improvisational leadership.

This new representation of the world changes what it means to be an effective leader. Goleman (2013) conveys the necessity of establishing a Triad of Awareness in the following context. "This multiple focus powers an organization's attention capacity for reading and

responding to complex systems. . . An organization's core functions - describe how a particular group focuses" (p. 210). This research inquiry experimented with ways professionals can articulate and prioritize purposes to expand awareness and more effectively focus, and in doing so, created the ideal circumstances for learning organizations to thrive.

A key component to leadership practice in complex systems is the identification of what specifically attention should be directed to. Heifetz et al. (2009) believe it is useful to establish an orienting purpose, write it down and say it aloud, "first to themselves and then to friends and loved ones, or even publicly in meetings and speeches" (p. 223). Orienting purposes combine the two main elements of strategy highlighted in the prior section: exploitation and exploration. Heifetz et al. (2009) encourage consistent assessment of which purposes individuals and groups prioritize, as well as the development of new and creative ways to articulate these purposes. "Adaptation requires learning new ways to interpret what goes on around you and new ways to carry out work" and can be achieved through a group's openness and commitment to learning (p. 105). Leaders need to promote emergence and should diagnose whether the norms create opportunities for learning or reinforce the status quo (p. 61).

One of the key parts of "Emotional Intelligence" described by Goleman (2013) is self-awareness, the first level of the Triad of Awareness. Self-awareness is our ability to focus on our self-purpose and ensure our values complement this purpose. The stronger our self-awareness, the better we can answer the question: "Is what I am about to do, keeping with my sense of purpose, values and meaning; or not?" (GoogleTalk, 2013). Empathy is another key part of Emotional Intelligence and informs "other" focus, enhancing the ability to read others, effectively motivate peers and understand how their personal purposes can align with those of the organization. Embracing the "outer" systems awareness develops leaders' abilities to

articulate, prioritize and instill larger organizational purposes. As Heifetz asks on a personal level, "what did I do today to further my purpose" (Heifetz et al., 2009, p. 221), groups and teams should be focusing on progress toward organizational purposes asking the same question collectively.

"Since the action research community as a whole is committed to bringing an attitude of inquiry towards questions of fundamental importance, we would do well to find ways to address the question of what purposes are worthy of attention more direct" (Reason & Bradbury, 2006, p. 349). Throughout this Action Inquiry, leadership behaviors were generated because this group believed it was worthy of attention and focus.

Description and Discussion of the Research Method

Overview of the Action Research Family

Academia is defined as "the environment or community concerned with the pursuit of research, education, and scholarship" (Oxford University Press, 2014). Most view academia traditionally as an exchange of knowledge where experts, authors or teachers influence the minds of students. The field of "Action Research" challenges this widely accepted paradigm. Action Research "combines inquiry with action as a means of simulating and supporting change and as a way of assessing the impact of that change" (Burns, 2007, p. 11). Danny Burns (2007) describes this type of knowledge exchange as "embedded learning" or "learning by doing", which both informs and creates change. In this case, the exchange is not one directional, but rather participants or researchers create knowledge collectively while they are proposing personal or systemic change.

> Common to all forms of participatory human inquiry is the tenet of working collaboratively with subjects and avoiding a manipulative, elitist approach to the research enterprise. . . developing knowledge in field settings as a catalyst for change- personal change, organizational change, and large-scale social change. (p. 3)

These methods are especially insightful and generative because of their participatory structure. This process is meant to influence "everyday practice of community activists, professionals, policy makers and change agents (as well as students and researchers) rather than a specialist process for an expert researcher" (Burns, 2007, p. 4).

Another key paradigm shift from many traditional academic forms is this field's emphasis on experiential knowledge that affects the present and future, not only an analysis of the past. "This sensemaking is not only an analytical process that takes place after the event; it is a relational and experiential process that takes place as things are happening" (Burns, 2007, p. 2).

This is another way Action Research is described as an "embedded learning process", as it is mobilizing the collective needs and goals of those affected by a problem or inspired by an opportunity.

Within the greater field of Action Research, this research project employed Collaborative Inquiry as the more specific method to explore directing personal and group attention. This project intended to inform research participants as well as the greater community on the development of an extended epistemology on directing attention, reaching beyond the primarily theoretical knowledge of academia (Reason & Heron, 1998, p. 3). Inherent in Collaborative Inquiry, the theory of "extended epistemology" involves four over-arching ways of knowing, including experiential, presentational, propositional and practical forms of knowledge (Reason & Heron, 2006, p. 149).

Peter Reason and John Heron (1998) published *A Short Guide to Co-operative Inquiry*, which outlines key advantages of the practice. Rather than employing detached and objective researchers, Collaborative Inquiry assembles a group of committed individuals who act as active agents in a participatory and inclusive manner. "Co-researchers need to develop the ability to look at their experience with affectionate curiosity with the intention of understanding it better" (p. 4). This research group experimented with new practices aimed at effectively directing attention to 'inner', 'other' and 'outer' awareness.

Collaborative Inquiry is defined by John Bray, Joyce Lee, Linda Smith and Lyle Yorks (2000) in *Collaborative Inquiry in Practice* as 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). There is a wealth of information created from traditional research forms on the

topic, which creates an exciting opportunity to employ action inquiry to connect theory and practice.

> Interpretations obtained by a detached observer through interviews about the experience of others are less likely to convey that experience with the same richness and validity than interpretations arrived at through dialogue on shared lived experience. In the latter collaborative process, the meaning of experience is derived from the inside out, rather than being imposed on experience. (Bray et al., 2000, pp. 4-5)

Meaning making from the inside out cannot be accomplished in a one directional academic setting imposed by experts. The new understanding and practices created through this research process were extremely effective and memorable because they were rooted in personal experience, meaning and significance.

A particularly strong definition of Action Research presented by Wendell French and Cecil Bell (1995) highlighting the unique way knowledge is created through this method is described as, "research on action with the goal of making that action more effective while simultaneously building a body of scientific knowledge" (Bray et al., 2000, p. 32). Action Research goes beyond past occurrences, encouraging the experimentation of current behaviors to inform and adapt future practices.

Assumptions of the Action Research Family

Action Research is a valuable form of human community that can deeply influence our lives on a variety of topics. "Human persons are agents who act in the world on the basis of their own sensemaking; human community involves mutual sensemaking and collective action" (Reason & Bradbury, 2006, p. 2). When we rely on personal sensemaking too often or exclusively it can limit our ability to serve adaptive challenges. However, when professionals independently research, inquire and poll others, they indeed receive input from others, but it is

ultimately personal sensemaking. Conversely, mutual sensemaking happens between groups of stakeholders through collective inquiry and the co-operative process of determining future actions and influencing new behaviors. This involves "seeing inquiry as a process of coming to know" (p. 7). Principally different than consensus building, mutual sensemaking is not an individual convincing others of their opinion, but co-operative discovery of new knowledge and practices. These are important characteristics of a community of learning where reflective inquiry is facilitated (p.3).

In the preface of The *Handbook of Action Research*, Bjorn Gustavsen discusses the challenges with traditional research and specifically its tendency to refer to single cases. "Action research will be of limited influence if we think only in terms of single cases, and that we need to think of creating a series of events interconnected in a broader stream - which we can see as social movements or social capital" (Reason & Bradbury, 2006, p. xxvi). This perspective emphasizes key features of "embedded learning", and connects factors that affect understanding of past experiences as well as the intentions inherent in future action.

Whereas meeting conversations "tend to be characterized by 'defending positions' and 'making decisions'", the ideal group presence for generative inquiry implies interrelationship and the possibility that something new emerges" (Burns, 2007, p. 8). This is easier said than done. Professionals become accustomed to the fast-paced organizational environment that desires decision-making in a prompt fashion. To stimulate effective and generative inquiry, researchers need to adapt their dialogue in order to promote new understanding and re-pattern behaviors.

What makes Action Research a truly "lived" inquiry is the way it not only informs, but also transforms the researchers and their groups.

> The primary focus in co-operative inquiry is on action, on transformative practice that changes our way of being and doing and relating, and our world, then it follows that the

primary outcome of an inquiry is just such a transformation, that is our practical knowing, our transformative skills and regenerated experiential encounters to which they gives rise, together with the transformation of practice in the wider world with which the inquiries interact. (Heron & Reason, 2006, p. 149)

New ideas, expanded vocabulary and discussion are not only what Action Research is intending to accomplish; most importantly these methods aim to change. This was exemplified in this research project, satisfying the need to promote new behaviors and practices and collectively evaluate and envision their contributions to our future application.

Key Steps of Collaborative Inquiry

The Collaborative Inquiry process has four main phases (Bray et al., 2000, p. 13). This process begins with the "Formation of the Inquiry Group", keeping in mind the commitment level needed, common interest in the research opportunity, developing the research questions and adherence to validity procedures (Bray et al., 2000, p. 14). The second phase involves "Creating the Conditions for Group Learning". This was accomplished by the facilitator's introduction of the key concepts, steps and assumptions of Action Inquiry. Once the research group understood this practice it was ready to begin the third phase, called "Acting on the Inquiry Question". This phase engaged the Kolb Cycle, which revolved the research group through cycles of planning, action, observation and reflection steps. The final phase of the Collaborative Inquiry process administered was "Making Meaning by Constructing Knowledge" (Bray et al., 2000, p. 13). During each part of the Kolb Cycle, researchers explored the research questions and constructed meaning around the personal and group behaviors proposed throughout the inquiry. All researchers were encouraged to engage a variety of different methods through the process of learning and adapt them at each subsequent cycle. This demonstrates, once again, how Action Research, like leadership, is an improvisational art.

Validity Procedures

Heron and Reason (2006) outline many validity procedures meant to help improve the quality of knowing (p. 149). Researchers need to be "open to the meaning we give to and find in our world by imagining it in sensory and non-sensory ways", or as I interpret this, in realistic as well as philosophical ways. One of the key goals of the inquiry is to "re-vision" the understanding researchers hold on attention and awareness. What each of the researchers knew prior to the project is much less important than their whole-hearted willingness to develop new understanding together. However, when research groups take these risks to be open with their views, "divergence of thought and expression may descend into confusion, uncertainty, ambiguity, disorder and tension" (p. 151). It was important for this group to expect a certain level of chaos and be content and accepting that this disorder influences the research direction appropriately.

"The inclusion of differing views is not just an asset to the collaborative process but a necessity" (Bray et al., 2000, p. 59). Divergence of perspectives and the dispelling of preconceptions and misconceptions are essential to the collective development of new understanding and new habits. Heron and Reason (2006) propose installing a procedure inviting "any inquirer at any time to adopt formally the role of devil's advocate in order to question the group as to whether one of several forms of collusion is afoot" (p. 150). This was vital because this group of researchers were similar in many ways. They are members of the same generation, have attained similar levels of education, have relatively limited professional experience and potentially share many more social identity characteristics that likely led to consensus often throughout the inquiry.

There are a multitude of things happening below the surface in leaders' behaviors. It was necessary for researchers to be skillful in their awareness during action, "of its bodily form, its strategic form and guiding norms, its purpose or end and underlying values, its motives, its external context and defining beliefs, and of its actual outcomes" (Heron & Reason, 2006, p. 150). Researchers were asked to constantly consider whether or not they were being congruent between these many components of their actions. It is important that organizations, in general, be consistent as Heron and Bradbury (2006) explain, "we must pay attention to the congruence between qualities of participation which we espouse and the actual work we accomplish" (p. 344). Congruency, in this manner, bred "reflexive concern for practical outcomes" throughout the research project.

Rationale for Using Collaborative Inquiry

Collaborative Inquiry was the best method to explore this research question and create opportunities for generative learning. The familiarity and trust developed among this close-knit research group catered to an environment where researchers were committed, engaged and authentic in this inquiry. Traditional, qualitative research methods would not foster and maintain the necessary engagement and mutual sensemaking desired to transform the personal practices of researchers and the organizational habits of the groups they lead. Multiple cycles of presentation, discussion, action and reflection in a participatory manner proved successful in yielding a substantive and organic body of new knowledge and perspectives for researchers to instill in their everyday lives.

Rather than employing a positivist approach, "based on the concept of dualism in which the researcher is separated from the researched", a "dialectical process of reality creation argues

that we should consider both the concrete and the perception of the concrete" (Baldwin, 2006, p. 223). Collaborative and Co-operative Inquiry forms question what is concrete and what contributes to its perception. In this way, the research group was "co-creating their reality through participation", which would have been impossible if the "researcher[s] [were] separated from the researched" (p. 223).

Traditional research forms search for explanations from experts, but this would not have been an effective means to create new understanding and influence change. "Explanation is not reality itself, as scientific rationality would have us believe. Unless people participate in the construction of knowledge, the knowledge has no meaning for them" (Baldwin, 2006, p. 223). Action Research has the ability to recreate the reality of its participants in a way that immerses meaning and emphasizes a higher level of connection among fellow researchers.

Basic Research Steps Implemented

Process for Inviting Project Participation

The introduction summarized the facilitator's intentions to invite this specific alumni group to take part in the Collaborative Inquiry. The facilitator is a member of the 2008 Fellowship Class, and invited others fellows from his class, as well as members of the class that preceded his and the one that followed. These alumni were sent a Research Introduction and Participant Recruitment Letter (Appendix C). These past Fellows are all young adults, working in many different capacities in a wide-variety of industries across the country who were all inspired to make a difference in the communities they reside and the organizations they lead. All invited research participants held organizational roles where the new understanding and behaviors created in the inquiry could be applied in their professional settings.

Effective co-operative inquiries are built on a foundation of value premises suggesting, "if people are excited by and attuned to these premises, they join, otherwise not" (Heron & Reason, 2006, p. 151). Prospective researchers saw this opportunity as an extension of the values in which the Fellowship program was based on, and were excited to develop new understanding and enhance their leadership practice. Research participants were then asked to review and agree to the Informed Consent For Project Participation Form (Appendix A), which acknowledged the nature of their role in the project, its intended time commitment, and stated the measures taken to uphold their confidentiality.

Facilitating Project Participation in Action Based Inquiry

The research group held an initial meeting where the researchers learned about the purpose, goals and structure of the project. It was also important that researchers had "an

opportunity to help define the inquiry topic" (Heron & Reason, 2006, p. 151) and provide

feedback on the research question. The research group had to justify the desire for exploration in

effective awareness and focus. The group also spent a portion of the meeting talking about the

dynamics that would make this learning community successful. Research participants committed

to being honest, respectful, communicating clearly and following mutually agree upon ground

rules. These commitments were imperative to ensure that researchers' were vulnerable, genuine

and comfortable.

In order to educate research group members on Action Research and Collaborative

Inquiry forms, the facilitator provided introductory materials compiled by professors from St.

Mary's College and Pepperdine University. During the first research period, participants watched

a video series titled, *Tutorials on Action Research*, produced by Dr. Margaret Riel, a professor at

Pepperdine University and the founder of the Center for Collaborative Action Research. The

facilitator also shared a powerpoint presentation from St. Mary's College professors Dr.

Monique Morris & Doug Paxton. In addition, the entire *Description and Discussion of the*

Research Method section of the project proposal was used to provide background on the key

elements of Action Research most relevant to this inquiry. These resources introduced the

background, procedures, key expectations and tangible applications of the Action Research

family in varied and interactive ways.

Although the topics explored by research participants in this project were not sensitive

and did not involve vulnerable populations, its implementation included some precautions.

Written minutes and summaries of meetings were stored in a private site online, where only

researchers had access. All researchers were aware the facilitator would use data from the

inquiry for his research project synthesis paper to be presented to various representatives of the

St. Mary's College Graduate Leadership Development (hereinafter GLD) program and permanently cataloged in the Saint Albert Hall Library in Moraga, California. The Agreement to Protect Project Participants (Appendix B) described the steps taken to protect research participants, agreed upon by the Facilitator and Project Advisor. Lastly, researchers received and signed the Participant Consent Form (Appendix A).

Given that the purpose and boundaries of the research did not include sensitive topics or vulnerable populations, no further approval was needed beyond that of the Project Advisor. Similarly, as all research participants involved represent unaffiliated groups, there was no need to seek any outside organization approval or consent. Before the research project commenced, a formal proposal was submitted and reviewed by the Project Advisor, which outlined the goals of the research, its planned implementation and the general expectations of research participants.

Data Gathering Procedures and Data Analysis

As research participants resided all across the country, meetings were held through video conferencing mediums. Additionally, interactive tools, resources and meeting minutes were made accessible through an open-source learning platform, called Podio. These forums allowed the research group to hold discussions, present on relevant topics, share resources on discussion boards and post journal reflections.

During the meeting portions of the research project, the facilitator recorded meeting minutes and posted them to the shared online workspace. These notes were essential for the facilitator to appropriately recollect and build on past inquiry sessions. During the intermediary periods of the project, between meetings, researchers cataloged their learning by journaling about

the proposed activity for that research cycle and related leadership topics. These journal files were also uploaded to the collaborative workspace.

Throughout the research project, group members identified gaps between theory and practice and generated new perspectives, vocabulary and ways to articulate and promote broadening awareness in their lives. Tracking these developments helped researchers evolve and narrow the topic. The research project installed four formal cycles of action and reflection to ensure pragmatism in the shared practices generated.

Action Inquiry is introduced by Bray et al. (2000) as research that is exhibited by "enhanced holistic awareness during action", and "consciousness in the midst of action" (p. 41). The essential data analysis of this Community of Practice was "examining the consequence of action and developing alternative ways of making action more effective" (Bray et al., 2000, p. 40). This research project focused on developing new understanding, vocabulary and meaning making around broadening awareness and directing attention in our complex business environment. The diverse ways research group members articulated the personal and collective behaviors and habits they attributed to exemplary leadership practice were documented and reviewed from meeting to meeting.

The group regularly identified gaps between theory and practice in their lives and recognized how their perspectives have changed once they experimented with new personal and organizational behaviors and habits. During the final cycle of the Action Inquiry, researchers compared their initial impressions of the research direction with their new understanding of broadening awareness and directing attention. The group also made space for reactions to their first experiences with Action Research, Collaborative Inquiry and the opportunity to implement them in their leadership roles.

Validity Procedures Applied During Implementation

In the selection of participants, the facilitator ensured this group would represent a certain level of diversity. This validity measure is important because it certifies that the new understanding and practices produced through the inquiry will be influential to others outside the research group. In this tone, the facilitator ensured participants would represent both genders and their leadership roles are in varied industries and fields. The research group satisfied the above criteria and their backgrounds represent diversity in ethnicity, socioeconomic status, nationality and regional residency. Lastly, the facilitator was delighted that five research participants agreed to join this group as three or less would have been too few and much more than six would have potentially lacked focus.

In order for this inquiry to have successfully generated new knowledge and meaning making, researchers needed to be "fully and authentically engaged" (Heron & Reason, 2006, p. 150) in this inquiry. One of the greatest contributing factors to this group's authenticity was its past experience supporting each other as co-workers at the USGA. Through this formal work relationship, they established a genuine level of trust and commitment to helping each other personally and professionally grow. Although research participants hold demanding jobs and have other time consuming life commitments, this group was properly engaged and regularly contributed to our inquiry.

More generally, it was imperative that the research project administered multiple cycles of inquiry, outlined earlier. "Cycling between action and reflection, looking at experience and practice from different angles, developing different ideas, trying different ways of behaving" (Heron & Reason, 2006, p. 150) are all part of the process. The true learning and influence on the lives of research participants comes from the application of the "re-visioned" understanding

in evolving behaviors and habits. In order to serve Heron and Reason's (2006) emphasis on

establishing an "appropriate balance" between action and reflection (p. 151), the facilitator

originally planned for four action inquiry cycles of two-week periods of action and reflection.

During one of the first meetings while discussing the intentions for the project as a group, the

participants agreed that one-week cycles would be more effective so there would be more focus

from cycle to cycle. The group believed that two-week cycles might disjoint the discussion

topics and limit the connection between leadership behaviors and habits.

One of the more foundational validity procedures was accomplished by the facilitator's

promotion of this group to be a "self-reinforcing learning community" (Heron & Reason, 2006,

p. 164). The purpose of Action Inquiry is for its participants to actively strengthen their capacity

to put the new understanding and behaviors into practice on an everyday basis. This project

became "self-reinforcing" in the way that the research outcomes intrigued participants to

implement these new practices among the research group as well as in their personal and

professional roles and relationships.

Project Timeline
Table 1. Actual Project Timeline

	Date	Activity
Research Period One	*5/5/2014*	The facilitator ***Sent Researcher Recruitment Letters*** to prospective participants.
	5/12/2014- 5/16/2014	The facilitator ***Administered Introductory Calls*** with five interested research participants. Following the calls, research participants were sent the project proposal with highlighted sections to provide background on the research method, the context of the research opportunity and relevant leadership studies resources.
	5/21/2014	During the ***Initial Meeting*** the facilitator introduced the family of Action Research, Action-based Inquiry and Communities of Practice. The group then discussed the research question and proposed research steps and a recurring meeting schedule.

	5/22/2014-5/27/2014	During the *First Intermediary Period* researchers viewed five Action Research tutorial videos and were asked to journal on a research question that has meaning to their individual leadership practice.
Research Period Two	*5/28/2014*	The *Second Meeting* began with highlights on leadership topics that influenced the research direction and a discussion ensued connecting researcher needs and goals to the research question. The group then discussed the intention for this research to instill new or adapted behaviors and habits that influence exemplary personal and group leadership actions.
	5/29/2014-6/3/2014	The *Second Intermediary Period* requested research team members to provide input on the existing research question and propose new ones. Researchers were also asked to journal on their hopes and goals for this Community of Practice, and how it could help them achieve their long-term leadership goals.
Research Period Three	*6/4/2014*	The *Third Meeting* administered group reflection on the research questions, discussion on the research structure and development and clarification of the first activity called *Exemplary Leader Highlights*.
	6/5/2014-6/11/2014	Researchers spent the *Third Intermediary Period* reading "The Focused Leader" Harvard Business Review article, journaling on directing attention and the Triad of Awareness, and posting a description of an exemplary leader they interact with regularly.
Research Period Four	*6/12/2014*	The *Fourth Meeting* began with short presentations on *Exemplary Leader Highlights* and group discussion on ways we can emulate those effective leaders researchers have been exposed to and should model after. This was followed by a discussion on the opportunities and challenges of directing group attention as 21st Century leaders. The group then developed and clarified the next action inquiry activity called *High Performance State and Recovery Plans*.
	6/13/2014-6/17/2014	Researchers spent the *Fourth Intermediary Period* reading "The Making of the Corporate Athlete" Harvard Business Review article and journaling on which of the four capacity areas they felt they needed to prioritize at this stage of their leadership development. They also posted a description of the contributors to their High Performance Leadership State and the triggers that distract or pull their attention and actions away from this state.
Research Period Five	*6/18/2014*	The *Fifth Meeting* began with researcher presentations on high performance leadership states and recovery action plans. This was followed by a discussion on the importance of valuing and committing to all capacity areas. The group then developed and clarified the next action inquiry activity called *Transformative Scenario Planning*.
	6/19/2014-6/29/2014	Researchers spent the *Fifth Intermediary Period* reading a compilation of excerpts from "Transformative Scenario Planning". Researchers were asked to construct a set of short stories that described possible future scenarios of a group they are affiliated with, and title each story with a symbolic and memorable name.

	6/25/2014	This **Project Advisor Live Checkpoint Meeting** provided an opportunity for the facilitator to share progress on the research project with the advisor, discuss the updated project timeline and develop a plan for the Project Paper submission and review cycles.
Research Period Six	6/30/2014	The *Sixth Meeting* began with presentations from each researcher on their stories and group discussion focused on effective ways to communicate visions in complex professional settings. The group then developed and clarified the next action inquiry activity called *Crisis Management and Communication*.
	7/1/2014-7/6/2014	During the *Sixth Intermediary Period* researchers were asked to post on a current or potential crisis affecting their organization and describe the effective methods to communicate and mobilize groups in response to the situation and circumstances.
	7/7/2014	The *Seventh Meeting* was spent administering researcher presentations on crisis management situations and effective internal and external communication practices. The group then returned to the research questions and original intentions in order to evaluate the overall project. They connected this activity, and the three that preceded it, in the context of broadening awareness and directing group attention.

Major Departures from Proposed Research Steps

As mentioned in the "Validity Procedures" section, the original research proposal planned for two-week Action Inquiry cycles. The facilitator believed that more time would allow for more in-depth analysis of leadership behaviors and greater insight. When the research group discussed the project timeline they believed that one-week cycles would keep this group more focused on the research question, especially since everyone was new to Action Research. This research would have most likely been generative either way, but one-week cycles did maintain focus and ensured commitment to the work.

Narrative Account of Project Implementation

Research Period One

      As introduced in the "Key Steps of Collaborative Inquiry" section earlier in this paper, there are four main phases for this type of research. As the facilitator, my first step was to "Form the Inquiry Group" (Bray et al., 2000, p. 13). Researcher recruitment letters were sent to the USGA Fellowship Alumni group. This communication outlined the goals of the research project, intended commitments from research participants, and demonstrated how it would serve as a data gathering method for the synthesis project of the GLD program. Five individuals replied positively to the request and I held introductory phone calls with each of these prospective research participants. These calls reiterated information shared in the letter and connected this work to the leadership roles they currently assume. Following these calls, I formally announced who had signed on to the research project and provided everyone a proposed schedule and a copy of the Project Proposal. The version I sent had key parts of the proposal highlighted, making it easier for the reader to review a concise cross section of the method, the research question and what makes this Community of Practice unique. Research participants understood the project in context and were also able to read further in any given section that may have sparked their interest.

      The first official meeting served as an opportunity to introduce the family of Action Research, Collaborative Inquiry and Action Inquiry as well as provide some background on Communities of Practice. I used a powerpoint presentation created by St. Mary's College professors to illuminate the key principals of Action Research and speak to its growing application in many academic institutions and professional organizations. The group discussed how these methods are similar to learning processes administered in the business world; the way

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we all plan, observe and then adjust our work. However, the research group acknowledged that it could be done much more effectively if business teams followed the formal steps of Action Research cycles and the inherent guidelines of Action Inquiry. I expressed why I believed Fellowship Alumni were an ideal Community of Practice group for experimentation with Collaborative Inquiry. This opportunity emphasized how this research project would build upon the foundational "shared competence" we were exposed to at the beginning of our careers through the professional development activities of the Fellowship program.

This discussion led us to a review of the proposed research question, which would be revisited during the Second Meeting. Lastly, I did a quick tour of the online collaborative space that we planned to use throughout the research project to communicate, share resources, reflect through journal entries and post assignments. The First Meeting concluded with the announcement of the tasks each researcher was expected to complete during the first intermediary period, prior to our Second Meeting. I asked group members to view a set of Action Research tutorial videos produced by a Pepperdine University professor. While watching these videos, participants were asked to think about the preliminary research question, brainstorm adaptations of the question and how it related to each of them personally.

Research Period Two

The second phase of Collaborative Inquiry involves "Creating the Conditions for Group Learning" (Bray et al., 2000, p. 13). This was accomplished in part during the first research period and was addressed further during the Second Meeting. Participants were asked to reflect on key learning from the Action Research introductions and voice questions that surfaced for them. Although this type of research was new to most participants, there was genuine

enthusiasm to experiment with it and identify possible applications of Action Research methods in their professional roles and organizations.

At this meeting I introduced Daniel Goleman's work on attention, focus and the basis of the Triad of Awareness. I put these concepts in perspective by describing the other publications this author is best known for and connected the Triad of Awareness to the field of 21st Century Leadership theories I explored in the GLD program. Participants agreed that this would be an effective way to structure our inquiry on personal and group leadership capacities. At this point, one at a time, researchers provided a short profile of their current leadership role, the organization they serve and what they believed was most prevalent for them within the three levels of awareness. At first, this activity emphasized the diversity among our leadership roles and how complex and different our leadership challenges were. However, common themes emerged when discussing the three levels: our personal management, the importance of relationships and our place within a larger system or culture.

I created space in this meeting for researchers to articulate the group behaviors that made our work together during the Fellowship program cooperative and supportive. We agreed to be respectful and courteous during this process and embody a willingness to take an active role in each other's leadership development. Lastly, researchers acknowledged the importance of balancing action, group discussion and personal reflection throughout the project.

Once participants had established an initial understanding of the research method and background on the research direction, I asked them to spend the second intermediary period providing input on the research question and share inquiries within the established context, which were meaningful to them personally. I also requested that each researcher journal about

their goals for this Community of Practice and how it could help them achieve their long-term leadership goals.

Research Period Three

As the research facilitator, I attempted to ensure that this inquiry was serving the diverse needs and goals of researchers so that their time commitment was productive and significant. The additional research questions submitted by participants were quite varied and could have led our inquiry in many different directions. As a group we discussed each question and agreed that enhancing our capacity to direct attention could allow us as leaders to serve the underlying challenges in each of them. The group decided that developing skills and new knowledge around broadening awareness and directing attention would be foundational to the leadership capacities necessary to achieve those more specific goals. This discussion concluded the expectations of the first two phases of Collaborative Inquiry, preparing this group to begin the more formal cycles of Action Inquiry.

The third phase of this type of research is called "Acting on the Inquiry Question" (Bray et al., 2000, p. 13) and is the substance of this entire project. During this phase, meetings, beginning with the third, were intended to conclude with a group discussion on the next activity. Researchers were tasked with collectively developing and articulating an activity that each participant would commit to over the following week. These activities would take the form of a leadership practice or behavior that researchers would act and reflect on independently throughout the week and then discuss in a participatory fashion during the next meeting.

Through the discussion of our unique leadership roles, one prominent subject stood out to me above all others. Many researchers spoke about the associated leaders and role models they

interact with regularly, including the ways we learn from them. One of the researchers then reframed the common phrase we all use, "role models". They described it as the way we consciously or unconsciously model our leadership after others, not just their roles. This encouraged us to use this context as the basis for our first activity called "Exemplary Leader Highlight". This involved observing the leaders we interact with on a daily basis and noting which specific actions they exhibit that personify the most important leadership traits. Throughout the week we were also intending to find ways to resemble these traits through our own practice.

Additionally, I suggested that the researchers read an article written by Daniel Goleman called "The Focused Leader", to deepen their understanding on our agreed upon research orientation. Researchers decided we should journal specifically on the 'other' level of awareness and how empathy influences their leadership practice.   Both this journaling and the aforementioned "Exemplary Leader Highlight" were posted on the collaborative workspace, through an app aptly called "New Learning".

Research Period Four

The Fourth Meeting began with researchers presenting on the exemplary leader or leaders they chose to observe during that week. This group embraced the fact that we have informal opportunities daily to learn from those around us and translate effective leadership behaviors we see in others into our own approach. Here are the highlights from that discussion that resonated the most with the research group.

The Director of a University athletics department was described by Researcher AO as regularly prioritizing what is most important and not being content with the status quo, but rather

encouraging their team to challenge what was familiar. Heifetz (2009) presents emergence in a similar way, suggesting leaders need to promote emergence and should diagnose whether the norms create opportunities for learning or reinforce the status quo (p. 61). Openness and transparency were also important to making leadership decisions that are justified by sharing insights and background around the many working parts of the system the department exists within.   This approach fostered widespread agreement and genuine commitment among team members.

A Director of a contract research organization was profiled by Researcher BP who was considered exemplary for their ability to demonstrate a good mixture of analytics and intuition when decision-making. Through active listening this leader develops dynamic understanding of the motivating factors of employees and entire teams. This intuition is created, not only from efficiency measures and data-driven analytics, but also from sensing the intricacies that make a team or organization most effective.

Researcher JE highlighted managers at a top automotive company who exhibited the utmost respect for everyone in the room by seeking opinions and contributions from individuals from all different experience levels and areas of expertise. Staff members at the company were challenged to embody a 'One Ford' mentality that truly valued team effort. The researcher explained this in contrast to other team dynamics she had experienced where "the higher up you were the louder your voice was". This is so important because one directional influence and overbearing hierarchies can overshadow the best ideas in the room and make gaining widespread consensus more difficult. This led to multiple researchers discussing flat organization structures, the values they seek to inspire, and the challenges they can create.

The overarching theme displayed by this pool of exemplary leaders was: encouraging and influencing constant learning within the organization. Many researchers described the way their teams were founded on shared commitments and designed to create the circumstances for learning. The Literature Review included in this paper alludes to adaptive leadership resulting from openness and a commitment to learning. "Adaptation requires learning new ways to interpret what goes on around you and new ways to carry out work" (Heifetz et al., 2009, p. 105). Venturing beyond the status quo, we discussed the importance to break the cycle of the same processes and ways of doing the organization's work. Another part of the Literature Review describes an essential leadership strategy that involves maximizing the "capacity of its knowledge capital by fostering productive interactive dynamics" (Marion & Uhl-Bien, 2007, p. 152). Promoting a flat structure, respecting everyone's voice and valuing intuition are all ways leaders can maximize the capacity for knowledge generation through the business culture and interactive dynamics they institute in their organizations. These topics influenced a rich understanding of 'other' awareness and how we should model our practice around the experiences we have acquired early in our careers.

Researcher DM spotlighted one of their mentors, who is a leadership consultant and corporate strategist. During a peer coaching session, the mentor expressed that when they first began their relationship, his intentions were to coach the mentee in a one-directional fashion. Soon the mentor revealed that under the guise of teaching and coaching, he began learning and changing his perspectives about his own development. This story helped researchers see that learning from the expert or senior person is not the only possible result. There are advantages to our own learning and skill development by mentoring and supporting others. When leaders

establish genuine concern and interest in supporting another person's personal and professional development, everyone benefits.

Overall it seems that the group was effective making distinctions between what was traditional, and conversely what seemed progressive in business practice. This is important for this type of research because its intentions were to develop new knowledge and experiment with new practices. When we bridged the exemplary practices of others to our own leadership, we began to illuminate the characteristics of our best self or, as multiple researchers described it, our high performance state.

In an attempt to put our discussion in context, I shared my recognition that the analyzing the models of leadership within our groups was an exercise in directing attention to 'other' awareness. Once reminded of the Triad of Awareness, one of the researchers shared how important self-management is to being an exemplary leader. Quickly the conversation shifted to the development of our next activity. The next cycle began emerging from the first and the phrase 'high performance state' became the theme of this step of the inquiry. Researchers decided that we would each describe what contributes to our high performance state and what tools or steps get us into this state. One of the researchers expanded upon this and proposed we also identify the triggers and distractions that we should avoid to maintain high performance. The group agreed that this would be intriguing and clarified this part of the assignment as a "Wellness Recovery Action Plan".

Once again, I took advantage of this (first in a lifetime) opportunity to assign "homework" and suggested the researchers read another Harvard Business Review article. Written by Jim Loehr and Tony Schwartz (2001) and titled "The Making of the Corporate Athlete", this article discussed the four capacity areas that contribute to high performance state in

leaders and managers. The resounding philosophy of the article is that physical, spiritual, mental and emotional capacities are all essential to sustaining a high performance state. Researchers decided we should journal on which of the four capacity areas we should prioritize directing our attention in the near future. Both this journaling and the aforementioned "High Performance State and Recovery Action Plans" contributions were posted as "New Learning" in our online workspace.

Research Period Five

Approaching the Fourth Meeting, I expected it to be structured similarly to the third, with researchers presenting one at a time followed by group discussion and then transition to the next presenter. The group discussed this plan but once the first presenter began it turned into a fast-paced and fluid discourse. Rather than individual presentations, the group as a whole discussed different leadership capacities and self-management techniques in a less orderly fashion. As the facilitator, this was one of the points where I had a decision to make: intervene or let the inquiry flow. I hoped this less organized inquiry progression would be generative and not worth disrupting by going back to presentations one at a time.

High performance state was expressed through different ways of knowing. Researchers described different habits and activities that kept them focused and sharp in their work. Work-life balance was the most resounding theme. Establishing routines was mentioned countless times. These observations were deepened by one of the researcher's acknowledgement that during the past week while journaling about the balance between capacities, he realized the difficulty of keeping balanced and in routine while traveling for work. All of the researchers can speak to the fact that this participant runs on routines. We all worked side by side for two years

and three of the researchers were roommates with him at one time. We saw his disciplined exercise habits as well as the professional tendencies first hand.

When I considered shared competence as one of the factors for choosing to solicit this research group for this project, I was thinking about the countless classes, seminars and speaker series events we participated in together as well as our experiences as a team representing a national governing body. This observation made me realize how the personal memories and familiarities that exist within our alumni group make understanding each other's contributions to the inquiry very easy. We were also each other's audience members for regular presentations in professional development classes, grant presentations at the USGA Grants Committee Meetings and toasts at friendly dinners. The leadership behaviors and actions were more intense because we were familiar with each other's academic, professional and personal selves. These insights have redefined shared competence for me and highlighted some of the more informal contributors to the Domain of a Community of Practice. These dynamics exist between fellow students in the GLD program as well. Engaging with students and faculty in academic, professional and personal ways through discussion in classrooms, online and similarly important in personal settings, fosters a well-rounded environment that supports each other's development through a amplified shared competence. Our cohort's ability to discuss routines is comparably effective because of the way we deeply know each other.

All researchers acknowledged that engaging in all four capacity areas was critical to creating a routine that satisfies work-life balance. As we had adapted our definition of high performance state, a recurring topic from the first few meetings resurfaced. The concept of performance reviews was something we all considered too often focused on the data and analytics of our work. We thought that a performance review should look more holistically at a

person's physical, emotional, mental and spiritual capacities. We discussed the wide array of personality assessments we have taken and all the valuable insights they generate. However we observed how this content often does not connect to traditional performance reviews. As a way to direct attention to 'inner' performance, we could initiate more holistic assessments during meetings with our superiors. For those individuals we mentor we discussed the opportunity to direct attention to their self-management by discussing the four leadership capacity areas and linking them to more traditional standards of performance.

We switched gears to the recovery action plans, which were also varied and unique to each participant. Each action plan acknowledged the difficulty of avoiding distractions all the time and sticking to routines.   Researchers cited different methods to turn their energy back to a state of focus and work-life balance.

Beyond directing attention personally on an 'inner' level, researchers observed and reflected on opportunities where this was accomplished on an 'other' and 'outer' level. In large organizations, routines and balance are often difficult to promote within the context of a deadline-driven culture. Researchers BP & AO recognized the opportunity to insulate a department and its own unique values. In both cases they worked in concert with the exemplary leaders they described in the Fourth Meeting, to promote these values among their groups and sub-groups. Other researchers mentioned how this was a bit contradictory to flat organizational structures that assume directing attention is a widespread action.

One final account related to directing group attention by engaging an emotional capacity. Researcher RC described the community health organization she worked for and its Founder, who happened to be the exemplary leader she highlighted from the week prior. She alluded to the way the Founder joined meetings on a regular basis and was present throughout the health

center. Often she would tell stories and the researcher recited one of her more memorable ones, that highlighted her belief that "the worst thing that could happen is that you would be too busy to say hi and see how someone is doing". This was such a simple yet moving way to direct attention to the 'other' level demonstrating the value this organization placed on its customers and staff.

As facilitator, I led the conclusion of our meeting by guiding attention to the third level of the Triad of Awareness. I shared my belief that our relationships are continuously influenced by the environment our organizations create and the greater culture our groups exist within. Then I read a few of the anecdotes from the proposal related to Systems Thinking as a way to bridge our inquiry to the "outer" level of awareness. When asked what prospective activities we should consider administering next, the group struggled to come up with options that satisfied long-term or systems level leadership work.

Although I was hoping the group would generate the next leadership practice organically, I felt the need to propose a concept from the GLD program. I provided a short explanation of Adam Kahane's (2012) work presented in *Transformative Scenario Planning*. This work and its principles were present with me because of the researcher's anecdote earlier in the meeting about the leader that employed storytelling to personify their organizational purpose and exemplary behavior. I quickly alluded to the storytelling that we were a part of at the USGA. Following her USGA presidency, Judy Bell, still the only female president of this historic and prestigious, ivory tower organization, founded the *Fellowship Program in Leadership and Service*. This program was established to administer the USGA's new core program, titled the "Good for the Game" Grants Initiative.   The most important part of the story was its purpose to influence the development of young people through golf. This purpose was directly served through the

millions of dollars the Fellowship program awarded to thousands of junior golf non-profit organizations around the country. Indirectly, the Fellowship program was developing young people, or young adults in our case, by providing Fellows the opportunity to grow as future leaders and philanthropists. We were the leaders of the initiative and literally the characters in the story!

The group equated this to an example of future scenario planning and suddenly the entire group was intrigued. The two researchers that attended a business administration masters program were familiar with scenario planning and this seemed to make the idea even more unanimous. I scanned excerpts from the *Transformative Scenario Planning* (2012) book that provided background on the method as well as three examples from the text in which countries used this systemic practice to influence sustainable change. The researchers were asked to each construct a set of stories about future possibilities of an organization where they are committed to its future outlook.

Research Period Six

The scenario planning activity served as an ideal way to explore presentational knowing among this research group by producing vivid complements to the propositional and experiential forms we regularly shared. Transformative Scenario Planning's keystone message is, *"we are addicted to our old stories, we need new stories"* (Authentic Leadership In Action [ALIA], 2012). I then repeated one of the Systems Thinking quotes from the end of the last meeting, "although the future can't be predicted, it can be envisioned and brought lovingly into being. Systems can't be controlled, but they can be designed and redesigned" (Meadows, 2008, p. 169). Kahane described this in a similar way through his corporate 'Transformative Scenario

Planning', "developing stories about what could happen, helps us think about the future and adapt to a future we could not predict and we could not control" (ALIA, 2012). When working with countries however, the scenario planning was not only intended to understand what could happen, but moreover to influence and transform what could happen. And finally before we got started I recited one last quote from Kahane that moved me the most: "Telling new stories enables us to get unstuck and move forward. Telling new stories enables us to work through wicked problems and great opportunities. Telling new stories enables us to create new futures" (ALIA, 2012).

It may have been because of the way their research facilitator spoke so passionately about the opportunity for the application of storytelling, but the group decided to expand on this activity. I suggested that these sets of stories could be shared as products of the research and included in the appendices, and all researchers were supportive of this plan. While all the presentations demonstrated insightful reflection on visionary scenarios, most lacked the names or titles that would truly make these stories stick among their organizations. I urged fellow researchers to consider the more memorable the stories, the more powerful it would be when directing group attention to the future. This was an important observation for our group, especially from the perspective of the two researchers with business degrees and experience with scenario planning. Even though they had experience with this method, they were not creating symbolic or themed stories. Although I introduced the practice as being an act of storytelling, all researchers described more realistic accounts. These observations suggest that although this approach is being employed in many professional settings, it most likely is not be utilitzed in the most engaging ways.

Researcher AO described the scenarios affecting the athletics departments at hundreds of universities nationwide given impending NCAA decisions on what types of compensation packages student athletes could receive and the implications on the university. I chose to highlight this story because it describes their organization as a potential driving force for others to follow across the entire national landscape. The way this school is revered as one of the most prominent, rich in history and trend setting in business, medicine, education and social innovation, its decisions and actions had the potential to spread ripple affects across its entire industry. The research group's mutual understanding of the context provided a rich systems perspective for discussion on these scenarios.

I immediately equated this with 'getting unstuck', 'moving forward' and enabling the creation of new futures. It is not a secret that creating and installing an organizational vision and strategic planning activities are very valuable methods. When we chose to focus our next cycles of research on 'outer' awareness, the researchers considered these methods too obvious and overused. I greatly appreciate that our inquiry often went deeper to explore real, tangible and creative leadership behaviors that drive change. The group was intrigued by Kahane's form of storytelling and through the activity brought the practice to life. Any planning or visionary work will propel a team forward, but there are special ingredients that contribute to getting unstuck and enabling new futures.

Researchers agreed to brainstorm and reflect on their Transformative Scenario Planning storytelling and work with the facilitator to construct titles for the set of stories that would be symbolic and memorable. Planning for the Seventh Meeting and the upcoming intermediary period, we decided to continue to focus on leaders' abilities to direct attention to 'outer' awareness. One of the researchers suggested that to balance out the previous, more idealistic,

future possibility activity the next should be an engagement with crisis management planning. Another made the action more specific by suggesting researchers focus on effective communication tactics for these difficult situations.

Similar to Meeting Five and our inquiry on 'High Performance States & Recovery Plans', Meeting Seven and its inquiry on 'Crisis Management' did not follow an orderly progression of presentations. Instead, situations and experiential accounts were brought up organically when one anecdote led to something meaningful for another researcher.

Researcher ML described the current crisis he faces being a Manager of Alumni Relations in a struggling industry. This crisis was not as obvious and life changing as a country altering the course of its future generations, but still garnered the desire for change. This topic generated momentum because it is perpetuated by some of the greatest issues affecting our millennial generation. The steep rise of college costs and the size of debt young adults hold are extremely imposing factors for alumni departments to overcome.

This subject hit home for all of us and was put in context because of which school he represents. Similar to the other school described earlier, this one has strong academic and athletic programs. The group recognized how their teams' presence on national television and in the news can automatically keep graduates engaged and connected to the school. Again, the group directed attention to a systems perspective. Even the alumni department at an institution with these clear-cut advantages was considered to be in a state of crisis. The prescription he offered was to get all departments in agreement that this was a real, overarching problem and it affected the overall well being of the institution. Researchers were optimistic that change could come and creative solutions would alter the University's course. Similar to the Transformative

Scenario Planning example from the meeting before, this possibility for action could have ripple effects on the entire higher education industry.

Researcher ML then described something that made this industry provocatively unique, the fact that there was no competition. I was immediately reminded of a piece by Peter Senge and Otto Scharmer (2006), titled "Community Action Research", which pronounced the opportunity for businesses or organizations to collaborate. Many groups isolate themselves and become secretive due to the competitive nature of their industry. The authors describe this opportunity as, "leveraging progress in individual organizations through cross-institutional links so as to sustain transformative changes that otherwise would die out" (Reason & Bradbury, 2006, p. 195). I decided that diverting the discussion may not be the best use of our limited time and chose to share this perspective with this researcher one on one at a later time. I hoped this strategy would serve as a test as to whether this group inquiry could breed continued collaboration with a smaller sub-group moving forward.

Researcher BP spoke about a shift in government contract awards away from private, for-profit companies like the one he represents, and the fear that those testing contracts would be sent to universities that could more easily absorb the costs of this work. Researcher JE discussed the crisis that is beginning to plague the auto industry abroad as certain countries increase their gas mileage standards for all new vehicles sold, rendering entire product lines of American car companies illegal.

Other researchers described their leadership techniques and learning experiences from dealing with past crises and effective management techniques. Lastly, I described a situation that unfolded just days before in the life of another Fellowship alumni, outside of this Community of Practice. She is the Director of a non-profit organization that holds racing events. Sadly, one of

the riders crashed and passed away during a recent race. This alumnus was the spokesperson and leader of an organization dealing with one of its most difficult times. These varied and all too relevant perspectives provided a well-rounded evaluation of crisis management. Hopefully the more prepared we feel, the best we can do when these tests arise in our careers.

This concluded the fourth cycle of action research as part of the 'Acting on the Inquiry Question' segment of this Collaborative Inquiry. The final phase of the project called "Making Meaning by Constructing Knowledge" (Bray et al., 2000, p. 13) was accomplished throughout research periods four, five and six and culminated with a group discussion during the Seventh Meeting. I created space at this time for researchers to share reflections on the inquiry process, the new knowledge developed and connections to the research question. The research group spent time meaning making around our full stream of four action inquiries and the way the levels of awareness can blend and influence each other. These overarching observations and reflections are expressed in the upcoming sections of the paper.

Evaluation of the Project Outcomes

Summary of Project Outcomes

This research project hypothesized that developing a stronger understanding of focus and the behaviors and practices that ensure effective awareness, are essential to exemplary 21st Century leadership practice. Utilizing a Community of Practice of young professionals, we experimented with Action Inquiry to "examine the consequence of action and developing alternative ways of making action more effective" (Bray et al., 2000, p. 40). This group endeavored to develop new understanding, vocabulary and meaning making around broadening awareness and directing attention in our complex business environment. These intentions were accomplished despite the participants having little or no experience with Action Research. Luckily, this group was deeply committed to developing leadership skills and demonstrated a willingness to try a new approach.

The goals of the research were achieved by engaging the research questions through Action Inquiry and the establishment of an extended epistemology on awareness and attention. One of the greater themes of Action Inquiry is the shift from what is propositional to what is practical (Heron & Reason, 2006, p. 149). This shift demonstrates knowledge development beyond the general and theoretical to more specific competencies and capacities that characterize effective leadership practice. This paper is structured by the levels of the Triad of Awareness, which serves as the framework for this exploration in practical leadership actions. Exemplary leader highlights, high performance state engagements, transformative scenario planning and crisis management preparation were all used to practice directing attention, and make action more effective overall.

During the final meeting, the group connected our learning through these leadership

behaviors in the context of the three levels, seemingly in reverse order. We articulated how

storytelling that transforms and enables change in the 'outer' level requires cooperative learning

and engagement of group members on the 'other' level, which happens through the changing,

adapting and evolving of personal habits and behaviors within stakeholder's 'inner' level. The

way these ingredients of leadership complement each other confirms one of Goleman's (2013)

keystone arguments about focus, "there's a strong case that leaders need the full range of inner,

other, and outer focus to excel - and that a weakness in any one of them can throw a leader off

balance" (p. 224).

Significance of Project Outcomes

One of my early objectives was to facilitate research among young professionals in

particular. I found this intriguing because our upbringing was different than older generations.

We experienced all levels of education during the fast expansion of the information age and the

implications on our self-management, social interactions and professional capacities are endless.

Exploring how representatives of the millennial generation, learn together outside the boundaries

of organizational structures has been fascinating. These insights are valuable today because our

generation is 'climbing the ladder' and influencing the way businesses operate even though we

have limited professional experience. Looking forward, the insights we discover about our

abilities to learn together and adapt with the changing environment can inform how future

generations may interact during the professional era of their lives.

This project benefitted from being introduced and conducted in an academic setting. The

fact that it was connected to a reputable institution and graduate degree work legitimized the

research project and enticed participants to contribute in a more authentic manner. Further, the

opportunity to experience and experiment with emerging research forms struck a genuine interest in members of this alumni group. I believe since this group of young professionals see themselves as life-long learners they were driven to self-development in this non-traditional form. These six researchers are not the only ones. I believe there is a great opportunity for more millennials to participate in Communities of Practice and both formal and informal academic forms.

Further Questions Generated

During our final reflection on the full stream of the Action Inquiry cycles, common concerns arose related to the 'other' and 'outer' levels of awareness. We all seemed comfortable facilitating and developing learning environments in our departments and with our direct reports. However, influencing these characteristics among the greater organization wasn't as simple. Even those environments that on the surface value emergence and a flat organizational structure still have hierarchy and power immersed in their decision-making mechanisms. Similarly, researchers felt that storytelling and scenario planning would be effective within their groups but more difficult to promote among the Founders and 'C-level' individuals, who have been invested and committed to their organizations since we were in primary school. Creating space and committing time for the joint construction of the organization's future are integral to implementing these changes. This is challenging given the high demands our professional cultures promote. It seems important to be patient and build trust, but when is the right time and the right place to push an organization-wide adaptive change?

Reflection on Sustainable Organizational Change Processes

Learning About Conducting Action Research

According to System Theorist Gareth Morgan (1998), one of the defining characteristics of effective organizations is that they act like living things (p. 36). This is a shift from the prominent mechanistic mentality prominent in the 20th Century industrial society. This juxtaposition personifies the difference between Action Inquiry and traditional research. "This sensemaking is not only an analytical process that takes place after the event; it is a relational and experiential process that takes place as things are happening" (Burns, 2007, p. 2). The way this Community of Practice embodies an embedded learning process that overlaps with our daily personal and professional actions, made it life-like. Heron and Reason (2006) analogously encourage experimentation and transformative practice through "lived inquiry" (p. 149).

This sounds great, but it is easier said than done. Throughout the process our group experienced difficulty concentrating on the lived experience of the last week. Researchers often discussed events, situations and perspectives in a greater context. This was still a productive discussion that led to new knowledge, but the topics and insights were at times overwhelming. A consequence of this was that the group did not dive as deep into their behaviors and practices at first. This did prove to be a bit of a paradox, given the fact that inquiries can benefit from researchers considering events in a stream (Reason & Bradbury, 2006, p. xxvi).

Reflection on the behavior or action was difficult to keep focused. One week at a time I saw this group improve and grow within this capacity, to not only "live the inquiry", but also to reflect on it in a substantive manner. Both in Meetings Six and Seven, the context of a systems perspective was constantly shared in order to frame our conversation on how to direct attention to 'outer' awareness. I discovered that we were doing this naturally all of a sudden. Once we

were in an academic setting (even in t-shirts at desks and couches all across the country) these types of perspectives were shared. Collaborative Inquiry endeavors to assemble a group of committed individuals who act as active agents in a participatory and inclusive manner. "Co-researchers need to develop the ability to look at their experience with affectionate curiosity with the intention of understanding it better" (p. 4). By the last two meetings our ability to be reflexive on lived experience was impressive. I believe these capacities have the ability to be engrained in many other professionals who have not approached their leadership development as a lived inquiry before.

I see these examples as a testament to our research group fulfilling my desire for it to become a "self-reinforcing learning community" (Heron & Reason, 2006, p. 164). As a validity procedure, this was something we felt would justify the new knowledge. Researchers were meant to be strengthening their capacity to put the new understanding and behaviors into practice on an everyday basis. This Community of Practice was "self-reinforcing" in the way that the outcomes of previous cycles were the impetus for more exploration and the re-patterning of behaviors.

Another research convention that was difficult to embody, conducting this type of inquiry for the first time, was being entirely appreciative. The group had a tendency to revert to deficit language despite our intentions to be appreciative (Ludema et al., 2006, p. 161). Rather than being wholeheartedly focused on future possibility, the inquiry was often regulated by too much consideration of limited resources. I also felt there was not as much divergence (Bray, p. 59) and disagreement as there should have been given the diverse environments we each live and work within. This lack of conflict disrupted our ability to make meaning deeply in certain instances. One last factor that limited the full potential of the collaborative inquiry was the demanding time

commitments of researchers. Although researchers were extremely present during the

conferences, it was clear that there was not an ideal balance of action and reflection (Heron &

Reason, p. 151) that most likely limited the researchers from being fully engaged.

During our final meeting together the group reflected on the fact that these

aforementioned characteristics are present in many of our professional group settings and

certainly have an impact on the way we discuss topics and interact in meetings. As leaders we

need to be conscious of these norms as we consider how to adapt our conversations to embody a

more academic and inquiry-focused approach. I believe the longer this group of researchers

participated in this inquiry forum and the greater amount of time they each committed, the more

rewarding the outcomes and our personal leadership development could be.

Learning About Constructing New Knowledge

The previous section highlighted some technical areas of improvement that could have

enhanced the research, such as increased time commitment, revealing a more appreciative

mindset, and valuing divergence in the inquiry. This section will feature some of the less

obvious contributors to learning from this type of research work. Working through the steps of

the Kolb Cycle (planning, acting, observing and reflecting), was a new way for this research

group to approach leadership development, leading to some great insight about constructing new

knowledge.

What made this research group special and an ideal one to explore leadership capacities

was its Domain. Throughout the research project our familiarity, trust and genuine care for each

other's growth and achievements made insights deep and rich. This allowed the new knowledge

and behaviors to have a transcendent influence on us; not just cognitively, but sensually and

emotionally as well (Burns, 2007, p. 12). Engaging in what is practical and presentational makes

the learning based on what is meaningful among the members of the Community of Practice and ensures that new understanding and perspectives on leadership practice are memorable.

Traditional research methods investigate explanations from experts, but this is not the most effective method to create new understanding and influence change. Employing the Kolb Cycle put the researchers inside the inquiry and participative in the construction of knowledge. Baldwin (2006) suggests "unless we do that, the knowledge has no meaning for them" (p. 223). Constructing new knowledge through Action Research is so effective because of the way it directs attention. "Attention tends to focus on what has meaning-what matters. . . Leadership hinges on effectively capturing and directing the collective attention" (Goleman, 2013, p. 210). Although following the structure and steps of the Kolb Cycle is important, improvisation along the way can be advantageous.

Another observation I made was that some of the original intentions for the research were lost along the way. Despite my attempts at the beginning to put this inquiry in the context of the information age and increased technological distractions, the group did not revisit those considerations. It may have just been foundational to this group's perspectives on work in the 21st Century. The only professional setting we know as 27-29 year olds is one with screens on our desks and in our pockets. For millennials, communication that arrives in email, virtual, and online forms is second nature. Months earlier, I even proposed a different Action Research project that was much more direct in its emphasis on how technology affects the way we focus. We were able to sustain our inquiry without revisiting these perspectives and context. In retrospect, I am glad that the overwhelming technological presence in our 21st Century environment was not a pervasive influence on our discussion. This allowed for more focus on our personal and professional challenges in order to learn to better thrive in future opportunities.

I have learned that making on the topic doesn't need to justify all the original reasons for exploration. The structure and progression symbolized the improvisational art that is leadership. This was exemplified in the way the group developed the research steps and formal activities in a flexible way that served the evolving needs and shared interests of the group. Although they were created in a participatory fashion, the new knowledge and practices were personal to each researcher and have been interpreted in their unique way. Each researcher incorporates this "lived" learning into their leadership roles, equipping them with new perspectives and insights that will help serve their distinctive course. The meaning making of this research cannot truly be evaluated anytime soon, as its intended influences are meant to last a lifetime.

Learning and Integration

Learning from Engaging in 21st Century Leadership Practices

The most prominent leadership practice this Action Inquiry research experimented with was storytelling, which is a trusted method among many leadership theorists. Ronald Heifetz emphasizes the importance of practicing and experimenting (Parks, 2005, p. 205). Within the context of the research findings, these are two things we should be directing our personal and group attention to as leaders. Heifetz distinguishes adaptive leadership as "acts of imagination and commitment" and "the practice of creating new realities" (Parks, 2005, p. 205), both features of storytelling. Howard Gardner is cited in *The Terms of Engagement* also stressing the importance of storytelling: "organizational change is a process of shifting the story an organization has about itself" (Axelrod, 2010, p. 100). Stories exemplify the power of language and its ability to change what is considered possible for future scenarios and outcomes.

As a leader it is important to not declare the vision by myself, but rather "create communities for action" (Axelrod, 2010, p. 100) around shared purposes and then create stories of its future possibility. Inherent in this future and possibility-focused work is the drive "to be more". When Micha Popper (2005) profiled transformational leadership, he established that leaders are distinguished by their ability to encourage others "to be more" (p. 114). Transformative Scenario Planning enables its facilitators to encourage their entire community or country 'to be more' through stories about possible realities and futures.

Creating new realities for ourselves should be influenced by our interactions with others. Overwhelming interaction with only one group or organization may constrain our ability as leaders to be adaptive and imaginative in the way we create new realities (Parks, 2005, p. 205). Participating with multiple groups fuels a wide 'outer' awareness and systems perspective, like

that created by members of this research project. Telling stories was an influential way we supported our capacity to extend our personal and group awareness. In these ways we can satisfy Goleman's (2013) conviction that "great leaders must have the essential long view that a systems understanding brings. . . expand their focus to a further horizon line" (p. 252). Incremental change is all too common in organizations and is likely a result of our addiction to old stories (ALIA, 2012). This justifies the importance of participating in multiple, diverse groups in both formal and informal settings. Engaging with new stories makes us open to opportunities for the transformative change that gets groups unstuck and perpetuate the creation of new futures.

Personal Learning

The most difficult question this research has led me to was: "how can leaders with broadened awareness and astute triple focus influence the creation of new stories in a business environment?" My answer is "blurring the lines" of what is considered professional and what is considered academic. Our professional approach should be distinct from the traditional views of academia, defined earlier as the exchange of knowledge where experts, authors or teachers influence the minds of students. However, when the pursuit of research, education, and scholarship are imagined in the context of Action Research and its inherent philosophies and forms, I see an opportunity for an enhanced consciousness that blends the two mindsets together.

The way leaders tell stories should be analogous to the way authors write stories. The way collaborative inquiry departs from deficit language and values divergence must be appreciated in offices and boardrooms.   If organizational stakeholders approach challenges and wicked problems as active agents within an embedded learning process, paradigms can shift.

Our society as a whole has the ability to create new realities and futures if it increases civic engagement and incites more people to commit to Communities of Practice that make education, development and self-improvement life-long endeavors.

Let me close this section by sharing my highest priority personal learning: I am so lucky to have been selected for opportunities like the USGA Fellowship and accepted to join a life-changing group like Cohort 30 of the St. Mary's College GLD program. I need to continue to challenge myself through future endeavors and take advantage of the people with whom I am so fortunate to work, learn and laugh alongside.

Research Group Learning

I hope that all researchers feel a motivation to design and redesign their future self, the outlook of their organizations, and even the larger world we live in. Researchers seemed dedicated to employing Action Research principles in their leadership roles and organizations. One of the most valuable principles of Action Inquiry researchers embraced was the collaborative and participatory nature of reflection. It was evident that this group, like many others we work alongside, administer personal reflection, but less often on a group level. Expanding our reflexive practice will lead to broadened awareness and an enhanced ability to direct group attention.

The spirit of self-transformation was alive among this group in this educational environment. Through the research activities we experimented with ways to translate that 'inner' spirit to 'other' and 'outer' awareness. Valuing a cooperative approach builds our capacity to transform on a systems level. I am intrigued to see how our alumni group and the diverse

communities of practice we associate with can support this continued transformative

development.

Implications, Growth Edge and Next Steps

I was overwhelmed with the research group members' willingness to commit time to learning, leadership development, and the support of their peers. This serves as a testament to the needs of young professionals to engage in learning outside the boardrooms of their respective organizations and beyond the classrooms of their "ivory tower" institutions. This group was fortunate to attend some of the most well respected schools in the country and is now lucky to be working with influential mentors. How much more learning does Researcher AO need after a combined six years at Stanford University and mentorship from the executive committees of the United States Golf Association and the PAC 12 Conference? More is the modest answer. This desire to continue learning serves as an acknowledgement that Communities of Practice are valued by our generation. Despite overly packed schedules, emerging forms of non-traditional learning could have a large impact on the way alumni and networking groups provide support.

I am inspired that this group is enthusiastic about continuing to meet as a virtual Community of Practice beyond the formal phases of the Collaborative Inquiry research project. We will have monthly check-in conferences, where we will invite other Fellowship alumni to participate in this habit we have initiated. The preliminary intentions are to remain as a support system for each other by sharing developments in our personal and professional lives. Who knows how much the melding of the student and business mentalities can offer us over our lifetimes as we grow and evolve? But I look forward to see how a consciousness redirection that engages adaptive leadership with values inherent in both students and leaders can influence my generation and those that follow.

Midway through the GLD program, we were exposed to 'Orienting Purposes' that are meant to guide our future action and I had a powerful premonition that I should write my own.

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Throughout the planning, implementation and synthesis of this research project, I became compelled to revisit this statement.

> My orienting purpose is to be a positive influence and leader among my friends and family members and the most important groups in my life. I will take pride in cultivating togetherness and support channels among my network, enabling and encouraging others to transform and become "more". Being the long-term link among all these meaningful people will create a heightened level of connection that will make life special and rewarding. (Author's personal journal, January 5, 2014)

I see my life-long development as a leader and participation in Communities of Practice as effective ways to engage this purpose. By further articulating and prioritizing this purpose, I can "live the inquiry" that is creating new realities and futures for my organizations, my communities and myself.

The most important word in this statement is "more". This can be embodied in 21st Century leadership practice on an individual level by adapting our personal habits, on a group level by influencing learning organizations, and on a systems level by transforming stories. "More" conveys the tenacity and undying commitment of individuals, groups and entire cultures to value development and transformation.

Heifetz (2009) asks us to reflect regularly on the question "what did I do today to further my purpose?" (p. 221). Everyday I spent facilitating this research project, I have been realizing and furthering this purpose. Now it is up to me to transition from being a young professional and graduate student into a leader who influences the blending of business and academia for the 21st Century.

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Appendix A: Informed Consent for Project Participation

Participant Consent Form

You have been invited to participate as a co-researcher in a collaborative inquiry research project titled: A Collaborative Inquiry on Personal and Organizational Behaviors that Broaden Awareness and Direct Attention. The purpose of this leadership project is to identify and enhance capacities to develop systems awareness and promote future-focused visionary priorities among groups. This research project will be directed by members of the USGA Fellowship Alumni group who are interested in developing these abilities.

The co-researchers will meet approximately eight times April through June (2014) and undergo approximately five cycles of action and reflection. If needed, the group may decide to meet more frequently or integrate more cycles of action and reflection to ensure that the project is well executed and meets the needs of the participants.

In addition, this project fulfills a requirement for the Masters Degree program in Leadership, offered through Saint Mary's College of California.

Participation in this study is completely voluntary, and participants may decline to participate in any aspect or withdraw at any time. There will be no negative formal or informal consequences for declining to participate.

While we will all use our real names during the project, the report will use pseudonyms as a means of upholding confidentiality standards required by Saint Mary's College and the Leadership Studies Department.

Saint Mary's College requires that an inquiry project initiated by a graduate student include a consent form that describes anticipated risks. While the group of participants will be encouraged to maintain all shared information in confidentiality, there is no absolute guarantee of this. If confidentiality becomes an issue of concern, participants may contact the Faculty Advisor or the research project Facilitator to address these issues with urgency.

Please direct any questions about this research to Daniel McKegney (graduate student and research Facilitator) dam6@stmarys-ca.edu or his Advisor Ann Masai at annmasai@gmail.com.

After reading this consent form, and receiving a copy, I agree to take part in this collaborative inquiry research project:

_____   _____
Signature   Date

Appendix B: Agreement to Protect Project Participants

Facilitator Agreement Form

The proposed collaborative inquiry will not involve contact with a vulnerable population or involve risks of social or psychological harm from inquiry into a stressful issue or sensitive topics. If the project involves, or changes toward involving a vulnerable population or a traumatic or highly confidential issue or increased risks to participants, or seeks to recruit participants that are accountable to the convener, I will seek my Faculty Advisor's counsel so that relevant IRB protocols are followed.

To ensure the protection and well-being of participants, I agree to:

(1)   review the guidelines and procedures outlined in the *Agreement to Protect Participants* and *Obtaining Informed Consent* sections found in the *Application for Protocol Approval* of the *IRB Manual*.

(2)   ensure confidentiality, and obtain informed consent from all participants that will conduct the proposed CI project. All audio recordings of sessions will remain in the Facilitator's possession and not shared beyond the purpose of this project.

(3)   communicate anticipated risks to the project participants as conveyed in the project proposal.

(4)   obtain approval from my Faculty Advisor before proceeding to recruit participants.

(5)   periodically check in with my Faculty Advisor to ensure I am reaching appropriate progress and consistently conducting the CI project as expected.

(6)   contact my Faculty Advisor if there are significant concerns or issues raised by any of the participants that arise during the timeframe of the project.

Research Facilitator _____Dan McKegney_____   Date _____April 9th, 2014_____

As Faculty Advisor, I pledge to monitor the ethical issues regarding protection of participants as human subjects, and consult with the IRB (or proceed to standard IRB protocols) in the case that the research involves a vulnerable population, a highly sensitive topic, or unusual risk.

Faculty Project Advisor__Ann Masai_____   Date _____April 10th, 2014_____

Appendix C: Research Introduction and Participant Recruitment Letter

April 21, 2014

USGA Fellowship Alumni,

I hope this letter finds you well. First, I would like to provide a short update on my recent academic endeavors. Then I will introduce my research project and the opportunity I would like to present for you to be involved. Whether or not you are interested in reconnecting in the formal setting, I would love to hear from all of you and separately try to organize a trip or meeting place for all of us to get back together connect in a more informal manner.

Last January I enrolled in the St. Mary's College Masters in Leadership Studies program, a 20-month executive degree program based in the San Francisco Bay Area. This program specializes in 21st Century transformative, adaptive and values leadership practice, enhanced by inspirational professors and the equally accomplished fellow students making up my cohort. This program has been life-changing for me and provides a substantial amount of practical knowledge I will apply for a long time in and out of the boardroom. I currently have three courses remaining, complemented by a Synthesis Research Project, which is why I am reaching out to each of you.

This project requires to students to develop and initiate action research addressing a problem or inquiry which the student or group is interested. I have chosen to do a collaborative inquiry on broadening awareness and directing attention on personal and group levels. As opposed to traditional research, action research forms involve embedded learning in a participatory and continuous manner. Meaning new knowledge and vocabulary on a topic is co-created and multiple cycles of action and reflection evolve the learning through application in our leadership roles and then returning to group reflection.

I believe there is a considerable opportunity for this inquiry to yield insightful leadership practices and new ways to articulate them, given the diverse roles we hold as young professionals and our experience supporting each other's personal and professional development. Certainly, you are helping me complete my coursework, but I believe you all would get a significant amount of value from this experience. I plan to revisit our non-profit management course work, leadership seminars and other professional development opportunities made available to us during our fellowship and connect many of those experiences to my coursework in this Masters program. I also hope to use this research opportunity to invite influential people from our fellowship experience, such as Nathan Teegarden, Roberta Kraus, Judy Bell and any others we decide will be beneficial additions to this inquiry, to reconnect with us as our research developments.

This project is planned to take place during the months of April, May and June this year. It will begin with an initial meeting to collectively agree upon the research question(s), Once these details are agreed upon and a schedule is established, this group will meet for five, two hour meetings each ten days apart. As we are spread out across the country, research meetings

will be held through online video conferencing mediums. During the ten-day periods between meetings, researchers will independently instill new behaviors and habits into their everyday lives and journal on learning and outcomes; this is the action and reflection. I estimate that participation in this project will require a 20 hour total time commitment between now and June 30th.

If you are indeed interested in participating in this project or have questions, please reply with a good time later this week and the best phone number. I can then hold an introductory call to explain a bit more detail about the project, this Master's program and answer any questions you may have. We can also begin negotiations on ways I can "repay" you for this significant favor you are doing me!

Thanks for considering and I hope to hear from you soon!

Dan McKegney

██████@gmail.com

Appendix D: CITI Curriculum Completion Report

COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI)
SOCIAL & BEHAVIORAL RESEARCH - BASIC/REFRESHER CURRICULUM COMPLETION REPORT
Printed on 06/23/2014

LEARNER	Daniel McKegney (ID: 4217818)
DEPARTMENT	Behavioral Sciences
EMAIL	dam6@stmarys-ca.edu
INSTITUTION	Saint Mary's College of California
EXPIRATION DATE	06/22/2017

SOCIAL & BEHAVIORAL RESEARCH - BASIC/REFRESHER : Choose this group to satisfy CITI training requirements for investigators and staff involved primarily in Social/Behavioral Research with human subjects.

COURSE/STAGE:	Basic Course/1
PASSED ON:	06/23/2014
REFERENCE ID:	13281237

REQUIRED MODULES	DATE COMPLETED	SCORE
Belmont Report and CITI Course Introduction	06/18/14	3/3 (100%)
Students in Research	06/18/14	10/10 (100%)
History and Ethical Principles - SBE	06/22/14	5/5 (100%)
Defining Research with Human Subjects - SBE	06/22/14	4/5 (80%)
The Regulations - SBE	06/22/14	4/5 (80%)
Assessing Risk - SBE	06/22/14	3/5 (60%)
Informed Consent - SBE	06/22/14	5/5 (100%)
Privacy and Confidentiality - SBE	06/22/14	3/5 (60%)
Research with Prisoners - SBE	06/22/14	4/4 (100%)
Research with Children - SBE	06/23/14	2/4 (50%)
Research in Public Elementary and Secondary Schools - SBE	06/23/14	4/4 (100%)
International Research - SBE	06/23/14	2/3 (67%)
Internet Research - SBE	06/23/14	4/5 (80%)
Research and HIPAA Privacy Protections	06/23/14	4/5 (80%)
Conflicts of Interest in Research Involving Human Subjects	06/23/14	4/5 (80%)
Unanticipated Problems and Reporting Requirements in Social and Behavioral Research	06/23/14	3/3 (100%)

For this Completion Report to be valid, the learner listed above must be affiliated with a CITI Program participating institution or be a paid Independent Learner. Falsified information and unauthorized use of the CITI Program course site is unethical, and may be considered research misconduct by your institution.

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Director Office of Research Education
CITI Program Course Coordinator

Appendix E: Research Transformative Scenario Planning Storytelling

Preserving Tradition or Forging a New Path (Researcher JE)

This researcher did Transformative Scenario Planning for the Ross Business School at the University of Michigan, where she is currently enrolled.

Preserving Community while Updating the Purpose

All classes and recruiting activities could be viewed through the lens of how businesses can help solve some of the world's most complex problems (instead of relying mainly on nonprofits and governmental organizations). Less emphasis would be on increasing salary and more emphasis would be on finding a career to maximize positive impact on society. The Ross School could actively inspire this in their students, not only while enrolled but as they venture onward throughout their careers.

Pursuing a Shift in the Paradigm

There could be a transformation to online education, where location is less important for classes but perhaps there are more global opportunities to work/study abroad while working toward a Ross degree. This grows the network and reach of the institution but sacrifices the intimate and participative features that make attending the program full-time a very unique and inspiring experience.

Uphold the Traditional Community at all Costs

Due to economic constraints and other opportunities for continuing education, more and more young professionals could decide that it is not worth forgoing two years of salary to go to a top business school. This would result in a smaller overall community.

Futures of the Federal Business Services Group (Researcher BP)

This researcher did Transformative Scenario Planning for the private medical research and pharmaceutical testing company they work for, and specifically the Federal Business Services Group they lead.

Bigger is Better?

We could expand our federal business portfolio into Department of Defense (Army, Navy, Air Force) clinical research in the next 5-10 years. This would cause <name of business> to have to grow rapidly and surpass the 500 employee threshold which would cause the company to lose its "small business" status with the government. The loss of the small business status would make us ineligible to apply for contracts that were set-aside for small businesses that now give us a tremendous competitive advantage. This would also require my colleagues and I to have to cross-train on DOD contracting which is a different world in comparison to NIH contracting.

Smaller, but Sustainable?

Senior management could decide to maintain status quo and only go after clinical research contracts within the NIH – the commercial side of our business is booming right now and is also more profitable in the short-term. Federal projects offer longer, more stable work that does not ebb and flow as much. Maintaining the status quo would likely cause the company to cutback the Federal Business Services group from 6 employees to 4 employees.

Merge & Realign?

As a family-owned company, the next generation to lead the company could decide to sell the company to one of our larger competitors that have tried to buy us multiple times in the past. The other larger competitors just want the <business> name, our scientists, and our federal portfolio of work. An acquisition like this would likely result in the dissolving of the Federal Business Services group as all of our larger competitors have robust federal business departments.

Motivating Change in College Sports (Researcher AO)

The debate and discussion around college athlete compensation has been more prevalent than ever the past few years. There may be NCAA guidelines and rule changes coming in the future that could affect the way every college athletics department operates. These scenarios mark different paths this school's athletic department could follow to be reactionary or possibly proactively influence the greater landscape of college sports.

Status Quo

This school could maintain its current programs, commitment and general approach. If major rule changes come, the athletic department would adapt its operations and overall structure to accommodate new standards that all programs will have to adjust themselves to be compliant.

Experiment

Following the example of the Northwestern Football program, this school's major sports program identify a new way to support their student athletes. The football team at Northwestern is attempting to unionize in order to coverage sports-related medical bills and protection of scholarships. Since the athletes generate revenue for the university, they should share the same right any other department at the institution has to form a union. This school could be innovative and find a fair way to compensate the student athletes by coming up with a way to re-direct sports revenues to help cover these costs of past, current and future student athletes.

Influence

If these new experiments and adaptations to the traditional athletics department operations at this school are successful, they should influence their adoption at other schools. This institution is a trendsetter among other schools nationwide in medical, business and social innovation academic programs, why couldn't it do the same for athletic programs. It may begin by influencing its new standards of student athlete compensation among the Pac-12 Conference and possibly down the road all NCAA-partner institutions.

1000 Shillings in 10 Years (Researcher RC)

This researcher founded a non-profit organization called 1000 Shillings that empowers impoverished women to start their own business and support their families through business micro grants. Since inception, this organization has made 24 female artisans a part of the global economy that are now able to provide for their families and contribute to their community in meaningful ways. This exemplifies a systems level awareness in that there isn't a market for jewelry in their communities but connects them and their products to consumers world-wide. These scenarios describe the potential futures possible for this organization and the communities it is supporting.

The Crested Crane

The Crested Crane is the national bird of Uganda. This animal symbolizes the beginnings of 1000 Shillings working with six women in the Namatala slum of Mbale, Uganda. This bird known for its beauty and serenity inhabited Uganda long before tribes moved into the area. This bird symbolizes pride and history among the Ugandan cultures and preserves its grace. 1000 Shillings is empowering the women to do the same - preserve their culture and support their communities with grace and strength.

The Himalayan Monal

This is the national bird of Nepal, which is the newest country where 1000 Shillings has worked to empower women to set up small business through micro grants. These birds are notoriously known for their crest feathers that are bright and beautiful features. This symbolizes the jewelry these ladies are creating and is the tangible item that women around the world can wear and use to tell the story. This noticeably bright and beautiful jewelry provides crucial financial means for these families and communities where things are not always as bright for these women. The fact that this idea was replicated in another developing country is a testament to the need for more support of these initiatives.

The Artic Tern

This bird is most notable as it travels further during its annual migration than any other winged creature. On average they cover the distance around the earth every year. This bird demonstrates the possibility for 1000 Shillings to help more women from small communities around the globe to establish their own businesses and provide for themselves and communities. As technology and worldwide connectivity become more and more prominent over the next decade there is greater opportunity for not just more micro grants and new small businesses, but also a greater influence of those existing. One of the things that makes 1000 Shillings unique is its prowess in telling the stories of the artisans and how their work is changing their lives.

Catalog and Communicate for Everlasting Engagement (Researcher ML)

This researcher outlined potential actions and opportunities to collaborate at the University to improve its alumni engagement. Each scenario is contingent on the one before to ensure genuine development and added value to all stakeholders.

Organize First

The alumni association could greatly benefit from a cutting edge database system customized to serve the needs of the department. Alumni information is cataloged in rudimentary files while disconnected from each other. A system that connects hometown, current residence, year graduated, course of study and other key information would change the way the department understands its audience. This futuristic, organized and high-functioning system would change the way alumni staff could target and connect graduates of the University.

Communicate Second

This University is fortunate to regularly embark on innovative research, have graduates in leadership roles in diverse industries and other attributes that make the learning community unique. However, not every story or spotlight is intriguing to every alumni. Being able to tailor

University news and prioritize certain initiatives to different alumni would enhance the department's ability to engage its 500,000 alumni. There exists a great opportunity for individual schools within the university to market to alumni who majored or now work in that field.

Engage Forever

The benefits of this organized information and an alumni group that is listening to its alma mater are endless. The alumni association undoubtedly benefits, but so do other University departments. I've already mentioned individual schools within the University created a smaller, but more captive alumni audience by tailoring their news to certain individuals. The development office can more easily target specific alumni or groups of alumni for donations and solicit support for initiatives they are more likely to support beyond the school's general fund. The admissions department could more easily request support from regional alumni to recruit the best and brightest from their area to attend either undergraduate or graduate programs. The athletic department could benefit by increased nationwide support of its teams.

Overall, increased investment and key initiation from the alumni association staff could lead to valuable insights for many other University departments. This progress would lead to a more cohesive administration and encouragement that coordination is essential to sustainable success of the University.

Climbing Everest as an SMC MALS Graduate (Researcher DM)

This researchers' set of scenarios is in relation to another research project in which he is actively participating. This Action Research is tasked with designing and utilizing a virtual Community of Practice for alumni and professors of the graduate leadership program at St. Mary's College to interact. The goal of this online space is to not only keep hundreds of alumni connected, but also provide a forum for continued learning. The story explores the disconnected

alumni group and missed opportunities for continued learning and the potential co-intelligence of a sustainable supportive community of leaders.

While reading this story imagine Mount Everest symbolizing the challenge, achievement, change or contribution that were all striving to make as 21st Century adaptive and transformative leaders. The personal, organizational or community transformation is personified by hikers journeying to the peak. Lastly, graduating from the Masters of Leadership Studies program is foundational to this story and represents the journey to one of the following Mount Everest Base Camps.

Imagine three separate base camps (scenarios):

- **Venture Alone**
  At Base Camp One, there are six hikers (graduates) stationed who have accumulated hiking and outdoors (leadership and business) skills and capacities that will be venturing to the top of the mountain on their own.

- **Form A Team**
  Base Camp Two has four hikers (leaders) who have developed relationships with other graduates and two in particular that now work together. Although these hikers all know each other, four of them will climb independently and the pair will climb as a team.

- **Strength in Numbers**
  Stationed at Base Camp Three are six hikers who plan to scale this mountain, or leadership challenge of Everest proportions, as a team.

The third group represents the potential for graduates to be connected and committed to an everlasting community of practice that branches off into teams that have shared purposes and tap their shared competence to achieve a steep goal. Group learning and co-intelligence can lead to evolving knowledge that supports the group members to adapt to the changing 21st Century environment.

Of the hikers from Base Camp One, only one hiker was able to reach the Summit. For many, individual capacities and experience were not enough to achieve this type of challenge. The four independent hikers from Base Camp Two were also limited by too narrow a skill set and not enough continued learning along the way. However, the pair did work together well, helped each other expose "shadows" and gaps in their practice and reached the top. The group of six hikers who departed from Base Camp Three not only reached the Summit, but did so in half the time as the others.

Graduates or hikers from all base camps had exposure to all the hiking skills, or leadership capacities, but that didn't prove to be enough. Hikers or leaders may have an expertise in geographic knowledge (systems thinking), nutrition and wellness (self-management), or the technical climbing skills (business skills). Rarely does a hiker or leader be proficient and

regularly apply all these different capacities at a high level. A group of graduates who already have a foundational level of shared competence and value long-term self-improvement and development, can change their perspectives and approaches to challenges that are 29,029 feet high.

Becoming a trained hiker (Getting the degree) is very valuable but it is important for us to consider the possibility of that value being even greater beyond what gets you to a base camp (graduation day). Possibilities are grander when you have a support system and community to continuing grow those capacities and multiply the value!

Appendix F: Research Team Photo