Moving Towards Authenticity:

Reviving Trust and Compassion in a Caregiving Organization

Faye Siluk

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This action research report prepared

By: Faye Siluk

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Research Advisor:

Rosemary C. Reilly, PhD

Department Chair:

Peter Morden, PhD

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Abstract

"Keeping the peace" is generally deemed as admirable in modern western society. For the small, close-knit caregiving organization in this case study, fear of disruption and conflict prevented the organization's desires from being actualized. The purpose of this project is to demonstrate how dialogue can be seen as a trust building endeavour, and that with increased transparency and authenticity, a system can gain clarity of vision in action. Through narrative reflective processes such as engaging in dialogue, conflict, sharing stories, perspective-seeking, and metaphorical visioning, a struggling system found ways to significantly benefit their circumstances. If we shift our collective energies towards emphasizing common ground, the problems we face at work suddenly begin to seem less problematic. This approach to dialogic change is infused with appreciative inquiry, presence, and reflective practice. The intention is for others to be inspired to trust themselves to collectively navigate challenging situations by facing them with honesty and integrity, rather than avoiding pain or discomfort altogether. This case study explores how a process consultation approach can be viewed as an opportunity to honour what's real, to hold space for discomfort, to socially construct new meanings and healthier realities, and to use self as instrument to expand compassionate awareness in a human system.

Keywords: Trust, authenticity, narrative reflective process, common ground, voice, diverse perspectives, process consultation, self as instrument, re-storying, caregiving organization, crucial conversations

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Acknowledgments

I would like to thank each person, plant, animal, and interaction that led me to where I am today. I believe that the spiral of time takes us wherever we need to go, and right now, I am here.

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Thank you to my learning community, the HSI 2019 cohort, for holding space for collective growth and change with me. Life before you is a particular blur.

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We cannot change the world by a new plan, project, or idea. We cannot even change other people by our convictions, stories, advice and proposals, but we can offer a space where people are encouraged to disarm themselves, lay aside their occupations and preoccupations and listen with attention and care to the voices speaking in their own center. Henri Nouwen

Foundations

What stories do we tell about ourselves? What narratives do we choose to live and believe? And does it even matter? The stories surrounding us essentially become us—for better and for worse (King, 2003). Groups of people can benefit from shared storytelling and sense-making (Delgado, 1989) to create bonds, build consensus, and to reconceptualise a more balanced reality. "The truth about stories is that that's all we are" (King, 2003, p. 2). Story creates us. Story gets us stuck. Story can also act as the vehicle through which we can rebuild, recreate, and reconnect to something truer. Who are we when we tell and believe our stories? What role does honesty and authenticity play in the construction of shared meaning? How *can* we show up authentically, and what does it entail to do so?

The term "authentic" is defined as something worthy of acceptance, or as someone true to their own spirit, personality, or character (Merriam-Webster, 2019). Crises of worthiness tie into the ever-present inauthentic representations of self that the status quo encourages us to portray to others. Allowing ourselves to show up authentically with our peers and colleagues opens a window for rejection, shame, and fear (Brown, 2012). It also lays the bricks for an empathic, shared, *human* foundation of more nourishing and connective relationships. How can

authenticity in the workplace help teams move towards their goals and visions? How can narrative reflective processes be used to help groups surpass the challenges they face? These questions serve as the threads through which this story, a process consultation story, will be woven together.

Over the course of this process consultation project, authenticity emerged as a recurrent theme for both the client and myself, as student consultant. Paradoxically, it served as both an obstacle and a way forward for a caregiving system experiencing a lack of clarity of vision, paralysis in decision-making, and emotional exhaustion. “I think the best stories always end up being about the people rather than the event” (King, 2010, p. 189). So this story, as told from my perspective, is about one caregiving organization’s journey towards increased clarity, more transparent communication, and improved wellbeing. It will be as much about me as it is about the organization. I have chosen to view this system’s evolution through a lens of narrative reflective process- a framework that offers a way of making sense of our experiences by telling, reflecting upon, and reconstructing our personal and collective stories to transform the way we live and work together (Connelly & Clandinin, 1990; Macy & Johnstone, 2012; Schwind, Cameron, Franks, Graham, & Robinson, 2012). I will also explore how my use of self as instrument (Cheung-Judge, 2012) can shape the construction of old and new realities for a system struggling to hope for a brighter future.

The focus of this project is to explore how an organization can move from a place of uncertainty, constriction, and general dis-ease, to a stance of increased clarity, openness, and wellbeing through the use of embodied storying and re-storying. A narrative reflective process allows for new alternatives to be created and shared amongst team members in an organizational context (Schwind et al., 2012). It is important to note that this approach can be employed in all

facets of our lives, as we are each entwined within complex interdependent systems, regardless of identity, status, or organizational structure. As such, this project is both extremely specific and extremely general. I will present one organization's experience, to be read as a case study, of sorts. It is my hope that you can understand that this is merely one perspective, and that various other stories live within this one. I wish for you to pull at threads that might bolster your own organization's ways of operating, or that simply tug at your heartstrings.

Learning Goals

Before embarking upon this process consultation project, I identified four specific learning goals that would help guide and track my growth. After going through the Human Systems Intervention (HSI) program, I had plenty of professional role models but did not yet know my individual style of praxis. My first learning goal was to carve my own path: to examine and reflect upon the question, "What kind of process consultant will **I** be?" At home, I like to make my bed first thing upon waking. I need to eat breakfast in order to feel fully awake and ready for the day. I feel healthiest when I get to move around between tasks, keeping a dynamic and changing physical environment. At work, as a process consultant, what would **I** need, want, or require in order to be my best self at work? How would those factors contribute to enhancing the client's experience and growth?

The second learning goal was to work with an organization that behaved like a family system (Epstein, Ryan, Bishop, Miller, & Keitner, 2003), where intimacy and interdependency are complex, and where I am personally connected to a member of the system (i.e. a member of the "family"). Since intimacy and interconnectedness are heightened in a close-knit family-like system, no one in the family can be understood in isolation from the whole (Epstein et al., 2003). Boundaries are more easily blurred, "on" and "off" work time becomes muddied or melded

together, and power can hold a particularly insidious grip on the development of the system. In a small, close knit team, I wanted to explore what would enhance or drain energy and productivity, and how boundaries and levels of trust (either present or lacking) impacted individuals' wellbeing.

Thirdly, I wished to experience the fine line between collusion and alignment. I am naturally a connector, an empath.[1] But there is a fine line between connecting and colluding with a system. I wanted to be able to clearly form meaningful and trusting relationships to leverage change, rather than getting caught up in organizational patterns to avoid social anxiety (Kahn, 2005). Throughout the HSI program I heard and read a great deal about collusion, and the threat that it can pose in process consultation (Block, 2011). I became quite fearful of colluding with my client- of biasing my work and soaking up the system's patterns of dysfunction or behaviours that uphold the status quo (which would inherently make it more difficult to shake things up and catalyze change).

Alongside my worries about collusion, finding alignment with a client felt like an important step in my learning journey. I have often worked in professional settings where I find myself, figuratively, like Sisyphus (Encyclopaedia Britannica, 2012), pushing a boulder up a mountain, only to have it roll back down again. For this final graduate studies project, I craved collaboration with a client who was ready, willing, and eager to engage in the work of process consultation (Schein, 1999) through a participatory action research approach.

Finally, I aimed at developing my ability to be vulnerable and open with my academic superiors- to speak freely (and even emotionally!) with my supervisors and professors as I met

[1] As described by Judith Orloff (2019), an empath is a person highly sensitive to emotions, and who's intuition guides their experiences. Empaths easily soak up others' energies or emotions.

struggles and triumphs. The fear of judgement and failure has been engrained in me as a student, and I felt it was "about time" to practice what I preach in the education system- to model being a student who is also a real person learning new things; to allow my role models to see me as fallible and striving and human; and to hopefully get to know them as such too. Unbeknownst at the time, this final learning goal became an interesting mirror through which I could better understand the system.

Case Study: An Example of Process Consulting from the Field

The System at a Glance

To put my skills into practice, I sought out a client suitable for my learning goals. The system I landed upon is an independent not-for-profit school called Blue Sky School. Located in Ottawa, Ontario, it serves students grades 5 through 10. Blue Sky self-identifies as an "experimental innovative prototypical school of tomorrow" (Blue Sky School, 2018), and targets its pedagogy towards students and families who are curious about alternative approaches to education. It focuses on innovative approaches to learning to develop the next generation of changemakers. Blue Sky operates as a student-centered, project-based, and inquiry-driven learning environment. There is a strong emphasis on relationships at Blue Sky School, positioning everyone- student and teacher- as lifelong learners. Students are referred to as "learners," and teachers as "coaches," a gentle example of their efforts to subvert typical roles and hierarchies within the education system. The coaches take on a facilitative role, planning experiences and opportunities for learners to broaden their perspectives and meet their personalized learning goals. Situated in community, Blue Sky partners with local entrepreneurs, professionals, and volunteers to provide access to as diverse of an education as possible. Subject matter experts (e.g. woodworkers, researchers, nurses, local homeless shelter volunteers, or

social entrepreneurs) are invited into the space on a regular basis to enhance each topic of exploration as it emerges. The approach to education at Blue Sky is responsive, needs-based, and highly individualized to each learner. Through inquiry-led, project-based explorations, learners and coaches work together to reimagine the meaning of "schooling" and "learning." The organization's mission is to provide education to youth by nourishing passion, sparking creativity, developing goals, and embarking on personal learning journeys. Blue Sky School's long-term intention is to find and prototype solutions to problems within the education system.

At the time of this project, Blue Sky School was in its second year of operation. It is a small system with a high degree of interdependency and social intimacy, mirroring a typical model of a family system (Epstein, Bishop, & Levin, 1978). Structurally, the organization is managed by two co-founders (both certified teachers), and daily operations are headed by two pedagogical coaches (also certified teachers). Five support coaches work to assist learners' personalized program plans, often working in small groups or on a one-to-one basis. Additional support from a youth psychologist can be accessed on a weekly basis. At the time of my entry into the system, twenty-four students were enrolled at Blue Sky School. So, in contrast to the typical public school model in Ontario where there are approximately 24 students to one teacher (The Canadian Press, 2019), Blue Sky's student-to-teacher ratio is drastically reduced. Due to the responsive and individualized nature of their approach to education, Blue Sky can also be viewed as a caregiving organization. Kahn (2005) describes a caregiving organization as "an institution whose members directly provide for people who seek healing, growth, ministry, learning or support of one kind or another" (p. 3). The staff at Blue Sky School work endlessly to provide quality differentiated education to their learners, resulting in an overwhelming sense of exhaustion and hardly any time left to meet their own personal or collective needs. When

caregivers give so much that they become emotionally drained, they risk having "nothing more to offer care-seekers" (Kahn, 1993, p. 539). For an organization grappling with the paradox of wanting to give, while not having much left to give, I saw this process consultation project as a key step in the system's journey towards building capacity and increasing wellbeing.

Entry and Contracting

I began contracting with my contact clients, the co-founders at Blue Sky School, in July 2018. We initially had telephone conversations to learn about one another's stories. I shared why I was drawn to them, how I learned about their organization, and what kind of project I was seeking to carry out. In line with my learning goals, Blue Sky was known to me through a friend from teacher's college (my previous university degree). I was connected to a "Blue Sky family member," which increased the complexity of levels of intimacy between this already-intimate system and myself. Since Blue Sky is an educational institution and my professional background is in education, it also seemed like a suitable environment for me to flex my discernment around collusion versus alignment (my third learning goal). When first beginning this project, the story I told myself was that working with an organization I already felt connected to on a personal and professional level would inhibit my ability to see what was going on through an impartial lens. I felt a great deal of empathy for this system, and saw myself in their shoes quite literally, as a special education teacher in Calgary three years prior. My hunch was that their heightened emotions would suck me in- I'd get caught in their ways of feeling and thinking. Intuiting that this would be a challenge for me in a process consultation role, I decided to move toward the discomfort- to risk complicity for the sake of learning and professional growth.

The co-founders shared their organization's origin story, and some current challenges and successes. They reported that expectations, roles, and structures within Blue Sky were murky.

Although the learners can often be found happily working on their projects, the staff juggles too many balls at once. They are managing the logistics of each day, students' individualized learning portfolios, guest speakers, field-trips, communication with parents, basic maintenance work such as keeping the school tidy and ensuring that there's enough toilet paper in the eco-friendly washrooms, as well as trying to balance designing academic programming with life-skills programming. An additional organizational challenge was that messages tended to get lost in translation between the co-founders, coaches, and support coaches. Decision-making was an arduous and dishevelled process without any particular structure or process. Working in an ever-changing, responsive environment was described as being both a stress and a strength. Things are always in motion at Blue Sky School, and it's hard for anyone to ever feel comfortably caught up on what's going on, who's doing what, and why decisions are being made the way they are.

It was during this time that I explained the participatory action research (Putnam, 1999; Schein, 1999) approach to this process consultation project: if this project were to unfold, members of the system would be invited to participate in a collaborative process wherein the outcomes are determined *for* the group, *by* the group. I would merely act as a facilitator, but the work itself would be done by members of the system themselves. This explanation was intended to not only clarify the process for the client, but also to remind myself of my role. It was my job to set a clear boundary between myself as facilitator/process consultant, and the client as the body moving through its own shifts. Here, I reminded myself that when holding a container (Bushe, 2013) for growth and change, one cannot be jumping in and out of the container too. If I entered the container (the group's process), no one would be holding the space (hence negating the power of a process consultant). We each had our roles: theirs, to try a new experience to build their own capacity for change, and mine, to guide them into the space and hold it with

clarity, confidence, and non-attachment. I offered the following metaphor to the contact clients: *You can think of me as a midwife. I will show you techniques, help you into position, and guide you towards health and safety, but it will be your own body that delivers this baby into the world- your own lungs breathing, and your own sweat beading.*

As supported by Argyris, Putnam, and Smith (1985), we would all work together to seek knowledge that serves action. Activities such as engaging in dialogue, conflict, story-sharing, perspective-seeking, and visioning all serve as ways for a system to take action to benefit their circumstances. The co-founders showed keen interest in participating in the project. Over the course of the months that followed, I continued my conversations with Blue Sky School, completing an environmental scan to verify whether Blue Sky would in fact be a good partner for this project.

The Problem and Intention for Change

The co-founders and I identified the presenting problem as a lack of clarity around how to put their vision into action on a day-to-day basis. The co-founders expressed that their goals were to develop tangible ways of bringing their vision to life, in turn providing a space where staff felt more energized, confident, and equipped to do their jobs. The co-founders wanted to improve the way they lead their organization and believed that process consultation could help illuminate what they had not yet been able to see for themselves. They committed to the participatory nature of this project, wishing to hear as many voices and perspectives from the system as possible.

My intention as a process consultant was to facilitate learning, communication, and structure to spark collectively beneficial change in the client system. To best prepare a design

that would suit Blue Sky School's situation, I learned more about the system during the discovery phase.

The Discovery

The discovery phase creates space for consultant and client to collaborate to make sense of the client's situation by systematically gaining information through dialogue (Block, 2011). Various data gathering methods can be used for a discovery phase. In this project, I decided to do a combination of third-party consulting, in that I would do the initial data gathering and analysis as the external consultant, and a whole-system approach, wherein the client has space and time to make their own sense of the data (Block, 2011). I started off with a third-party stance, speaking with members of the organization one-on-one to learn about their individual experiences at Blue Sky School. From this position, I played the role of an objective outsider, learning about the organization to later provide suggestions or an alternative point of view (Block, 2011). Later in the process, a whole-system approach was used, where a group of participants and myself from the system worked together on sense-making and action-taking. Both methods will be explored in the sections that follow.

Interviews

To speak with staff members one-on-one, I conducted semi-structured interviews (see Appendix I). I asked open-ended questions to learn more about what worked well and not-so-well, how the vision was understood amongst different team members, and what was needed for the system to build capacity to become healthier, stronger, more resilient caregivers (Kahn, 1993). I interviewed the co-founders, coaches, and support coaches. Everyone who participated in the interviews consented to do so voluntarily, which was made clear in the individual and institutional consent forms. Each interview lasted longer than expected, which suggests that

participants had a lot on their minds and hearts to unpack. They had a lot to say that they weren't otherwise given space to express. Kahn (1993) describes the role that a researcher/consultant plays in holding space for diverse perspectives to emerge, that system members often look to the consultant for validation and support regarding the emotions they experience in their jobs. "Caregiving is an essentially emotional act" (Kahn, 1993, p. 542), and the interviews at Blue Sky School became a site for emotions to be expressed, for meaning-making to develop, and for me to learn what to listen to and look for in the system. Participants appreciated the space and time to share their thoughts, feelings, and experiences. I received their stories of uncertainty, insecurity, imposter syndrome,[2] and fear of failure. Part of my challenge was to provide the space for participants to express themselves, without getting caught up in the throngs of emotion myself (Kahn, 1993). There was a general sense of mystery around "what other people were thinking"- and along with that, worry that others were dissatisfied or upset. On the whole, no one wanted to rock the boat. The fear of disruption emerged as a motivation to avoid conflict, or even potentially-conflicted conversations. It quickly became apparent that time for authentic sharing was not a regular occurrence in this system. Kahn (2005) explains that caregivers need a forum to unpack the information, actions, and reactions that they so often soak up through their work. Engaging in self-reflection and sharing with others can help the caregiver to separate their own identity from the information deposited upon them in the work they do. Unpacking personal reflections is a way to establish boundaries between self and other. Providing time for participants to share their perspectives and make sense of their situation allowed for new insights

[2] First described by Clance and Imes (1978), imposter syndrome refers to an internal experience of intellectual phoniness and difficulty believing that you are qualified or bright enough to be in a given professional situation. It is most prevalent and intense among certain samples of high achieving women, and relates to societal sex-role stereotypes.

and clearer boundaries to emerge. As the interviewer, it was interesting to receive appreciative feedback for taking the time to facilitate the interviews. It was important for me to be cognisant of the impact that creating time and space to share personal narratives can have on others. At first, it seemed like I wasn't *doing enough*. Upon reflection, it is clear to me that a trusted, open space to speak and sense-make can be a gift to caregivers. Participants were thankful for the space, surprised at how fresh it felt to share their experiences. Several people shared that it was particularly important to feel that they could trust me to hear and hold their stories. I immediately felt the weight of their gratitude- the significance of their need to share, to be seen, to be heard, to be recognized. I intuitively flagged this need as I entered the data theming process.

Theming the Data

Once the interviews were complete, I re-read transcriptions of my conversations with the Blue Sky staff members. Highlighting recurring words or sentiments, I amalgamated data that appeared either most frequently or was attached to emotional intensity, which I picked up through participants' tone, voice, pauses, silence, and breathing patterns. Being attuned to system members' emotional expression was also an element of using myself as instrument- an emotional barometer, so to speak. Four themes emerged from the data:

- Clarity – The client system sought clarity regarding roles and responsibilities, where to focus their energy, how to approach long-term planning, the demographic of learners to serve, and what to evaluate to know if they're succeeding as an organization.
- Communication – The client system wished to discuss expectations around communication, frequency and depth of communication, and how to communicate their intention and vision.

- Uncertainty – The client system faced uncertainty about their priorities, needs, what to balance, and job (in)security.
- Dependency – The client system described being dependent on others in order to make decisions, on a responsive and therefore chaotic model of operation, and on funding.

For the scope of this project, these four themes served as the primary exploration topics. Once fleshed out and acted upon, they provided a robust foundation for narrative reflective change processes (Kegan, 1980; Schwind et al., 2012) where shared meaning-making became the focal point rather than the diagnosis of problems, dysfunctions, or gaps. This meant that the client system put energy toward finding common ground and shared understandings by talking through the themes. Their goals were to come to agreements and newfound understandings, which in itself offered clarity to the system. As determined with the contact clients, our work together would aim to concretize Blue Sky School's vision, and to explore how to implement it on a daily basis.

The Decision to Act

The four themes (clarity, communication, uncertainty, and dependency) and the prioritization of gaining clarity of vision in action were the overt foci- the "what" of our work together. The "how" was a complex balance of strategies to increase authentic dialogue, collaborative decision-making processes, and trust formation, all grounded in the present moment to prevent the client from being swept away by abstract ideas (which I observed to be part of their pattern). As the consultant, I kept the words "how" and "right now" at the forefront of all my interventions. This stance was primarily to remind myself of the importance of developing tangible, actionable outcomes with the client system that could take place in the immediate future rather than as faraway goals. Aligned with its name, Blue Sky School is

excellent at *blue-sky thinking*. Their long-term ideas, desires, and goals are plentiful. Something they struggled with was putting their dreams into action within a short-term timeframe. I kept this in mind throughout each step of the project, as well as in all my communications with the co-founders.

As emerged from the interviews and was corroborated by the environmental scan, the team at Blue Sky School frequently exchanged messages and information but did not really *talk.* I viewed my role as a consultant as an opportunity to bring the team together, to engage in deeper dialogue, since the four themes that emerged from the data demonstrated that the system lacked common understanding, clarity of operations and processes, and space to express themselves honestly. I saw that new ways of interacting and understanding could be facilitated by narrative reflective processes, which would entail a whole-system approach (Block, 2011). I was intrigued to explore narrative reflective process with the Blue Sky team, as it opens possibilities for the emergence of unanticipated discoveries of both personal and professional knowing (Schwind et al., 2012; Tarule, 1996). Their need for a space to express themselves and to receive care led me to connection-based intervention approaches, and narrative reflective process is centered around forming stronger connections with self and other. Based on the presenting problem, the interview data, and the four themes, it seemed imperative for the team to gain collective cohesion around their vision and daily actions. “A primary belief at the heart of a resilient organization culture is that members move toward rather than away from one another when they experience stress and anxiety” (Kahn, 2005, p. 46). I attempted to create the conditions for the client system to move toward one another, to increase trust and hope, and to promote authentic dialogue and diverse perspective sharing.

Along this vein, I decided to base my interventions on narrative reflective processes that would improve the quality of communication amongst the Blue Sky School team members to address the confusion, fragmentation, and default response to anxiety (which was to move away rather than toward one another). The following question became crucial to the design and decision to act: If the system expresses a desire to hear from its members (data that emerged from the interviews), what's preventing it from happening? Based on the data gathered at the time, a general fear of disruption and a desire to prevent feelings from being hurt seemed to be keeping team members disconnected in their own heads- not voicing their opinions or perspectives to the whole group. "Keeping the peace" was such a strong motivator that it kept team members silent. Again, this supports the entry of a narrative reflective process as an intervention for a system experiencing lack of clarity and dissatisfactory patterns of communication. Shared narrative makes explicit the multiple realities held within a system. It allows for differences to be examined, and commonalities to grow, thus opening space for a more collective current reality to emerge.

As described by Schwind et al. (2012), "our experiences inform who we were, are now, and have the potential to become in the future" (p. 225). A narrative inquiry framework further develops the notion of experience and suggests that stories are the closest means we come to that experience. "By telling, reflecting and reconstructing individual and shared events, we gain the potential to transform our lives, and consequently the lives of those in our care" (Schwind et al., 2012, p. 225). For a group of individuals demonstrating a great deal of care for their learners, as well as for the longevity of their organization, I decided to intervene with a level of care they, as adults, were not yet receiving from one another, nor from their environment.

Perhaps due to the lack of clarity and authentic conversations between staff members, there appeared to be fear and anxiety around possible disruptive- or destructive- outcomes of this process consultation project. Members at Blue Sky School held the mental model that conflict is damaging, and that it ignites rejection or social isolation. Again, this connects to Epstein et al.'s (1978) framework of family systems, where members are so interwoven in one another's lives, that boundaries between personal and professional become blurred. As a system, Blue Sky School did not trust themselves to engage in conflict without threatening their social (or "familial") ties. As Gibb (1978) writes, "Trust begets trust; fear escalates fear. Trust catalyzes all other processes, is contagious, softens our perceptions, breeds trust in others, makes us less dangerous, and is self-fulfilling" (p. 16). Amidst the client's fear, it was important for me to trust myself. As a process consultant, I trusted my intentions as well as my ability to hold a strong container (Bushe, 2013) for the client system to engage in authentic (potentially conflicted) dialogue. Still, to build trust with them, and to avoid making the assumption that trust would be given freely, I realized that some foundational work would be wise, especially before shifting into the data feedback session. I knew if the system members were apprehensive, they'd be defensive, and therefore less open to learning or trying new things. At this point, the brunt of the fear and anxiety was coming from the co-founders, so, I worked to build trust, openness, and authenticity with them first. We began the process with a preparatory coaching conversation with the two co-founders and myself only.

Coaching Conversation

Various coaching methodologies can be used to access and broaden human potential. Inspired by the practice of integral coaching (Hunt, 2010) and the work of Ken Wilber (1980), deep listening, sharing, and reframing can be used to better understand the gap between how we

are and how we want to be. Coaching is a way to unlock the areas of our psychological selves that are blocked, therefore serving as another method of *opening*- of expanding understandings, realities, behaviours, and choices. I set up a coaching conversation with the co-founders as a means of enhancing trust on all levels: trust with self, trust with each other, and trust with me, the consultant. The preparatory coaching conversation provided time and space for the co-founders and myself to create shared meaning and understanding regarding the current work-landscape they experienced and the potential next-steps for our process consultation project. According to Patterson, Grenny, McMillan, and Switzler (2012), the purpose of dialogue is to create a pool of shared meaning. Although the staff members at Blue Sky School were speaking on a regular basis, their interactions focused more on the exchange of information than on engaging in dialogue to create generative connections, common understandings, and shared action plans. In caregiving organizations, "transformational change […] occurs when system members participate widely and deeply in devising ways to move toward shared goals" (Kahn, 2005, p. 227). I, therefore, intended to design the interventions to create a space where staff members could gather and communicate more deeply as a team (Kegan & Lahey, 2001), and I wanted the co-founders to practice building their own capacity for authentic dialogue before bringing it to the whole team.

What began as a conversation to establish expectations and to discuss the vision in preparation for the data feedback session quickly emerged into a trust-building encounter. Shortly after opening the coaching conversation with a check-in to gauge how the co-founders were feeling about the process, I learned the depths of their fear and anxiety as a reverberation from the system. Although they were keen to participate for the sake of the organization's evolution, their personal emotions posed as a barrier to the degree of presence and engagement in

our work together. Anxieties were being absorbed and projected in the system and appeared to be caught in a loop. As Kahn describes

> Caregivers create holding relationships with careseekers and in the process contain them. They absorb their experiences, their states of mind, and their emotions […] Once absorbed, information is inevitably imported into the caregiving organization. There, it must be extracted or unpacked from caregivers. (2005, p. 15-16)

What was experienced by individuals became systemic. The personal and the collective are interrelated, and in many ways, serve as mirror images of one another. This links to the theme of boundary setting- distinguishing one's work from one's identity. As an instrument for change, my interventions aimed at nourishing trust to release some of the constriction and fear and to evoke more openness to growth and learning. As suggested by Peter Block (2011)

> More often than not, the client's primary question is: "Is this consultant someone I can trust? Is this someone I can trust not to hurt me, not to con me- someone who can both help solve the organizational or technical problems I have and, at the same time, be considerate of my position and person? (p. 38)

The co-founders expressed worry that maybe this process would cause further division and confusion within the system. It was at this point that I became distinctly aware of the role to use myself as instrument (Cheung-Judge, 2012; Seashore, Shawver, Thompson, & Mattare, 2004). Through my own personal way of being, I modeled transparency, openness, and trust. Trust, as with many investments, operates under the principle whereby the more you put in, the more you get out (Covey, 2006). My intention was to show the co-founders that they are in fact

trustworthy, that I am in fact trustworthy, and that the process we're embarking on together is also trustworthy. By extending trust to other people, you empower them (Covey, 2006). So, what does this really look like in action?

I began by listening to the co-founders—simply hearing and acknowledging their check-in stories. On multiple occasions, they would ask me if they were on the right track: *are our responses actually what the consultant wants to hear?* I reminded them that this project is not outcomes-driven; rather, it's process-driven. What they share is what they share. It's theirs to own and mine to hear; no right or wrong here! I introduced the principles of open space technology (Owen, 2007) as a tool to soothe their anxiety around doing things "right" or "wrong". The principles of open space technology are as follows:

- Whoever comes are the right people.
- Whenever it starts is the right time.
- Wherever it is, is the right place.
- Whatever happens is the only thing that could have, so be prepared to be surprised!
- When it's over, it's over.
- Practice the law of 2 feet. If you're not contributing or learning, use your 2 feet to go elsewhere.

There was an immediate sense of relief after the co-founders read the principles. Permission to just "be," to accept what is and what comes, created immense space and calm in the room.

We then shifted into the clarification of the vision statement. I shared Peter Senge's words, "It's not what the vision is, it's what the vision does" (1990, p. 143). Prior to my entry in the system, Blue Sky's visioning efforts were geared towards finding the "right" phrasing of a vision statement. Two external consultants had been hired at different stages of the

organization's development to assist with the creation of a vision statement. Neither one of their efforts were successful; their approach was described by the co-founders as not being "the right fit." It is my understanding that vision is all about energy, dedication, and emotion. A shared vision reflects what people care about; it is inherently emotional.

> When people genuinely care, they are naturally committed. They are doing what they truly want to do. They are full of energy and enthusiasm. They persevere, even in the face of frustration and setbacks, because what they are doing is what they must do. It is *their work.* (Senge, 1990, p. 138)

As we discussed their perspectives and understandings of Blue Sky's vision, the co-founders' responses matched the data I had gathered from the one-on-one interviews: the essence of the vision was in fact mutually agreed upon. Lack of clarity was not around the vision itself, but how to live that vision on a daily basis. Additionally, team members had not yet realized that they all agreed on the vision—again, pointing towards the limited time and space allocated for sincere dialogue and shared meaning-making.

What this meant for my process consultation project was that I did not have to guide the client system through a visioning exercise in the way I had initially understood. Our sessions together showed that they already had their vision. My efforts were required in the realm of making ideas tangible— of bringing the sunny blue-sky vision down to earth, where vision could transition from an aspiration to a practice. Stavros, Cooperrider, and Kelley (2003) differentiate between vision and strategy. Vision is based on values, and strategy is based on goals and objectives. An appreciative inquiry approach focuses on the strengths of an organization and its values, forging together vision with action, since vision *is* action-oriented. Having a vision

actually changes the way we *do* things (Senge, 1990). It alters our behaviour and allows us to work towards a goal with our full selves. A vision stems from an intrinsic desire (Senge, 1990). "It is non-competitive, non-relative, and completely personal" (p. 138). As the consultant, I wondered, *how best to bridge the personal and collective?* Lucia Capacchione (2000) writes about the importance of setting up the creative space, both internally and externally, when embarking upon a visioning exercise. She also contends that there is a spiritual element to creating a vision, where one must prepare inwardly and outwardly to allow senses and desires to emerge. Once a vision is set, the heaviest challenge lies in the dance between a desired vision and the current realities (Senge, 1990), which leads to a state of creative tension, a form of conflict that, ideally, fuels motivation and clarity. I worked with the Blue Sky School team to translate their vision into a concrete reality, using an appreciative inquiry approach, based on open dialogue. This directly connected to my guiding themes of "how" and "right now" to ground the client in action-steps aligned with a current reality.

During the coaching session, I informed the co-founders that conflict would likely play a role in our work together. This threatened the implicit norms at Blue Sky School, which was to avoid disruption and conflict at all costs. I explained that, in this case, there was purpose to conflict. It would serve as the vehicle to hear multiple and diverse perspectives from within the system, which would then help us all create a pool of shared meaning (Patterson et al., 2012). I reminded the co-founders that one of the things they wished to get out of this collaboration was to know how each of their colleagues were experiencing their roles at Blue Sky School. Without open and authentic dialogue and shared perspectives, how would we ever know what one another thought or felt? To soothe some of their lingering anxiety, I offered a personal story of how I used to shy away from conflict. I modelled authenticity and vulnerability, which demonstrates

using the self as instrument. I shared that it wasn't until I experienced difficult conversations in an intentional and caring environment that I learned the magic of dealing with the tough stuff. I also asserted that for our work together, it would be my role to host a space where the goals of our dialogue would not be to determine rights and wrongs, but to simply hear all the voices. Covey (2006) writes, "our perception of intent has a huge impact on trust" (p. 76). If we do not understand where others are coming from, we cannot possibly understand their intentions. When we feel like we know others' intentions, it builds a sense of trust.

Towards the end of the coaching conversation, an opportunity for further trust-building and modelling using self as instrument presented itself. One co-founder asked if I would be able to share the data (the four themes along with the anonymized quotes) ahead of time, *before* the plenary feedback session. I felt my body tense, my temperature rise. I wondered: What was the right answer? If I say no, would she be too anxious to continue the project? If I say yes, is that collusion? Stephen Covey (2006) presents four core qualities required to establish trust. The first is integrity: "Are you clear on your own values, and can you walk the talk?" (p. 66). I committed to following the design of this project with integrity and authenticity, and so, I set a boundary and let the co-founder know that I would not share any data ahead of time. I could describe the general flow of the feedback session, but the data would only be seen when the whole group gathered together.

I waited- breath bated. How would this land? To my pleasant surprise, the co-founder accepted my response gracefully, and thanked me for being clear. I am reminded of the quote by Rabbi Jonathan Omer-Man: "Integrity is the ability to listen to a place inside oneself that doesn't change, even though the life that carries it may change" (Nepo, 2005, p. 11). I would later come to learn that this moment was crucial in the formation of our relationship. My commitment to

authenticity and integrity supported the development of trust with the client. Knowing that I could, in fact, follow through and do as intended, helped her trust me. Almost immediately, she thanked me and apologized for not trusting the process more. “To trust is to create simplicity, to focus the energy on what matters” (Gibb, 1978, p. 190). She audibly reminded herself (and the rest of us) of the open space principles and agreed that we could move on to the closure section of the coaching session.

Wrapping up the coaching session I asked the co-founders to take a moment to reflect, and to then share a metaphor or image depicting where they started our meeting, and where they found themselves now (at the end of the meeting). I invited them to focus on concrete details of their emotional, physical, and mental journey, to make sense of the experience in a new way (Connelly& Clandinin, 1990). I also decided to share my own short narrative in response to the question, as a way to further build relationship and trust. As we listened to one another, the picture became more complete. Three people had experienced the session- three very different individuals living very different realities- but we found a shared sense of accomplishment and newfound trust with each other (Schwarz, 2013). We had crossed the first threshold of a winding river together. Both co-founders and myself felt ready, aware, and better prepared to proceed with the collective on the stepping stones that followed.

Marching in Tempo with the System and the Presenting Issue

To add complexity to the web, at this point in the project, my personal life began to take on an eerily paralleled narrative to the client system. Using the self as instrument (Bushe, 2013; Cheung-Judge, 2012) developed a whole new meaning. Literally, overnight, the path ahead of me took a sharp and painful turn. I suddenly found myself facing a hurtful breakup, which involved a betrayal of trust, an unstable career situation, and also generated a precarious housing

dilemma. My own relationship to boundary setting also took on deeper meaning, as I had to prioritize my own needs and advocate for my wellbeing. My work with Blue Sky School became less of a priority as I treaded life's new waters, merely trying to keep my head afloat. Along a Gestalt approach, Cheung-Judge (2001) writes that at any time, the self is never independent from the environment. The self comes with us (it *is* us); work and self are one and the same, not separate. Since using my self, as an instrument for change, was crucial in my process consultation role, I had to prioritize my own wellbeing before others. "Refining our instrumentality implies regular maintenance work on self" (p. 44). Interestingly, I found the self-help research I was engaging in to be directly related to design plans for Blue Sky School.

Initially, I felt ashamed to be in such an emotional state. My default response was to sweep it under the rug, to act as if nothing was plaguing my internal landscape. However, the intensity of my heartbreak made it nearly impossible to contain my emotions. I was raw, vulnerable, messy, and still deeply invested in carrying out my process consultation project with Blue Sky, but I didn't know if it would be possible. Maybe it wasn't the right time? Brene Brown's studies show that "opening up and allowing ourselves to be vulnerable creates the conditions for empathy to blossom. Empathy is connection; it's the ladder out of the shame hole" (2012, p. 81). Brown's work reminded me that contrary to our fears that lead to shameful feelings, we are, in fact, loved for our vulnerabilities. "Humans love humans- it's how we're wired!" (2012, p. 56). Looking in the mirror, I saw how aspects of my own experience reflected the client system. It dawned on me that vulnerability and authenticity were already woven into Blue Sky's process. Using myself as instrument could involve allowing others to see and hear my true self, therefore modeling that authentic expression is not only permitted, but actively beneficial and connective. My authenticity showed that disruption or conflict is not necessarily

negative, which helped dispel the mental model historically upheld by the system, to keep the peace regardless of potential for connection. “Vulnerability is courageous and contagious” (Brown, 2012, p. 54). I called the contact clients to explain where I was coming from, and that despite the upheaval, I was committed to delivering this project with them.

Feedback Session

Two days after the coaching session, the whole team came together on a voluntary basis to learn which themes emerged from their interview data. As designed, from then on, it would be up to the system to determine how to proceed based on their own needs (again, I was just the “midwife”). At the time, the climate at Blue Sky School was figuratively gray, heavy, and muggy. Most participants arrived late to the session and were distracted by learner-related crises or qualms. The caregivers in this organization were exhausted and stuck in their patterns of responding to new (and old) issues day after day (Kahn, 2003; Schwarz, 2013). Once they had all arrived, they expressed that it was the first time in a number of weeks that they were all physically gathered in one room at one time. For a system whose souls were clearly suffering and tirelessly putting out fires, I opted to start off the session with a breathing exercise and a gratitude circle (Macy & Johnstone, 2012). This helped the client system arrive to the session in a holistic and embodied way. Taking time to appreciate the interdependent nature of their team also created conditions for a grateful, strengths-and-wellness-focused interaction.

After they breathed, reflected, and acknowledged how they all lean on one another in their jobs, the co-founders shared the story of the preparatory coaching session with the rest of the team. Their narrative included the initial anxiety and scepticism, as well as the appreciation for clear boundaries, integrity, and trusting the process. They were eager to share the open space principles with their colleagues, too (which I had already prepared, but the co-founders beat me

to it!). This reflective opening seemed to help them make sense of their experience and share it with the collective (Schwind et al., 2012). The whole team loved the open space principles, indicating that "permission to trust the process" was a breath of fresh air.

The four themes (clarity, communication, uncertainty, dependency) catalyzed dialogue in the system by bringing it to the surface and explicitly inviting participants to discuss what the data meant for them. My role as consultant was to hold the space in a way that supported authentic expression and clarity of purpose for the team (Schwarz, 2013). Creating a container where the group's stories, experiences, and perspectives are woven together to give sense and direction (Bushe, 2013) is the art of dialogic consultation. As the group members discussed and made sense of the data presented, I was reminded of a quote by Mark Nepo, "A question we are never done with is: How can I discern what is real and what is distracting from what is real?" (2005, p. 44). They were overwhelmed with the weight of their jobs, and burdened with immense care and attention that they devoted to their students and families- common challenges faced by caregiving organizations (Kahn, 2005). I noticed the team looking for "the one problem" or a "right" answer- a save-all solution.

This reflected the theme of dependency, as did the keen interest in working with an external consultant. The team was looking for a saviour, either a person or a piece of data- something that would act as the salve to their dis-ease.

> The experiences, emotions, and needs of careseekers are absorbed into caregiving organizations via their relationships with caregivers. Part of what gets absorbed is careseekers' experiences of dependency […] Caregiving organizations absorb these wishes, and with them, careseekers' struggles with authority and dependency. When they are

> without settings in which they can examine these wishes for what, and whose, they really are, organization members take them as their own. The organization becomes the stage on which the struggle is enacted. (Kahn, 2005, pp. 90-91)

Rather than offer a solution (regardless, there wasn't one!) or collude in the pattern of avoiding pain and trudging along, I invited the team towards their pain. It was my understanding that the only way out is *through*.

Joanna Macy coined the term "Despair Work," which focuses precisely on examining pain to move beyond it. Despair Work evolved into a practice called the Work that Reconnects, and it was with this framework that the Blue Sky team engaged in a reflective narrative process to re-create a new story- a new reality (Macy & Johnstone, 2012; Schwind et al., 2012). Macy and Johnstone (2012) suggest that pain-points are precisely where to begin. In order to create and adopt a new narrative, it is imperative to acknowledge the struggles we face as a collective, to accept that they are difficult to process and likely even confusing to live with. By holding space for the pain, by seeing it, we can then deepen our aliveness and strengthen the bonds we have with one another.

The Work that Reconnects framework (Macy & Johnstone, 2012) follows a spiral (see Figure 1) beginning with gratitude, moving to honour the collective pain, then seeing with new eyes, and finally, going forth to new horizons. The spiral offers a path with clear intentions and stages. For the emotional, dialogic, and divergent styles of this client system, I felt that the spiral could prove as a useful roadmap.

Following the spiral during the feedback session, participants worked together, sharing perspectives and ideas to start to heal themselves. They took the initiative and made the decision

(part of the "going forth" stage of the spiral) to prioritize their wellbeing. Together, they would implement a personal and collective wellbeing check-in during their weekly huddle meetings. The check-in would be used to see if people needed individual support, or to just get something off their chest. It would also create room for maintenance of team dynamics to emerge on a regular basis, strengthening the cohesiveness of their interdependent web.

Figure 1. The Work that Reconnects spiral (n.d.). Gifted to Joanna Macy by the artist Dori Midnight.

Action Plan

The client system had grappled with the data, they had established a collective and personal wellbeing check-in, and they had begun prioritizing what to do "right now" and "how" to bring their vision to life. The next formal stage of the process was to develop an action plan- a clear guide to make the intangible tangible.

I borrowed from Liberating Structures (n.d.) Purpose to Practice process (P2P), as a framework for the action plan (see Appendix II). P2P helps groups clearly shape what is needed for their initiative to succeed. Aligned with Patterson et al.'s (2012) emphasis of creating a pool of shared meaning, P2P is geared towards organizing and mobilizing a concrete, mutually agreed upon plan of action. Open-ended questions guide the team towards clarity and structure, naturally enabling convergence of diverse ideas and perspectives.

As an additional tool, I introduced Emery's rationalization of conflict model (1999), which aims to illustrate an organization's most desirable future and most probable future, while also supporting groups to not shy away from conflict when hammering out the details of their desired strategic changes. These two futures are displayed in a Venn diagram, with the overlapping middle-bit representing "common ground." This tool serves as an intervention to increase clarity of purpose and to focus on what's really possible. The questions "What can you do right now?" and "How?" played a center-stage role. As the group moved through the stages of the P2P process, I drew the Venn diagram and the team members populated it throughout their discussion. The structure of these two simultaneous processes provided space for multiple perspectives to be shared. The Blue Sky team explored questions such as: *What can be chaotic? What can be structured? What can we accept? How can we make our vision work best?* Disagreements and conflict emerged, and the process allowed for them to serve rather than

hinder the group. Modelling asking deep or provocative questions was one way that I used self as instrument throughout the process (Cheung-Judge, 2012), which sharpened their narratives to seek increased clarity and common ground. I created a list of "things to let go of" and "questions for clarification." Blue Sky's habitual way of operating would have gotten stuck trying to find an absolute "right answer" or "solution," but the process elicited different viewpoints, and then moved onto what was tangible, feasible, and in alignment with their vision.

The team was surprised at how much common ground there was. Again, entering the session, there was an assumption that they were not on the same page. The P2P process and the rationalization of conflict approach presented an opportunity for Blue Sky School to make sense of their story. They realized that they are in fact working towards a shared vision, and they clarified what was possible within the parameters of their natural, human limitations. "It's not hard to make decisions when you know what your values are" (Roy Disney, as cited in Covey 2006, p. 70). With increased clarity of vision and values, decision-making suddenly seemed speedy and effortless. The team appeared to be in a flow, creating a rhythm and making sense of their current reality and co-creating a new one. The results of the session extended beyond a strategic visioning exercise- the client system got to hear one another's voices and better understand the pain-points for each person in each role. Coming out of the meeting, the team had gained a greater sense of clarity of roles and responsibilities, as well as how to best support one another when the weight of caregiving became too heavy to bear. They were reminded that they have the tools to replenish themselves *together*, just as they "deliver knowledge, expertise, support, and caring" (Kahn, 2005, p. 38) for their careseekers (the learners), they can offer the same qualities of care to one another.

An “aha” moment took place, when one team member exclaimed, “It’s like we’re a family, co-parenting these kids! We all need each other, and we all have something to offer. We’re on the same team.” Heads nodded and smiles erupted. I registered this as a new narrative for their collective identity. The metaphor of co-parenting created a new way of accessing the intangible elements of their interdependent relationships (Epstein et al., 1978; Schwind et al., 2012), opening a new way of understanding their roles and dynamics.

> In such settings, resilience is created when members move toward one another to engage themselves and their work, supported by a set of integrating structures and practices, caring relations with one another, and beliefs in the efficacy of their work together. Working together enlarges members’ capacities. (Kahn, 2005, p. 51)

They closed the session with an intention to continue following the plan they had established within their new co-parenting paradigm.

Reflection Session

There was a two-week lapse between the action plan and final reflection session. In those two weeks, grief and pain seeped into the Blue Sky environment. Trauma within and around the caregiving organization (Kahn, 2003) took an emotional toll on the team. Mental illness was impacting the whole system, and exhaustion and fear gripped the staff. As they worried about their learners and about each other, they reverted to a familiar place of stuckness. The whole system was like a deer in the headlights- paralyzed with uncertainty around how best to proceed.

The day I was scheduled to visit for the reflection session, Blue Sky almost cancelled. One of the co-founders would not be able to make it, and would likely need to leave for the remainder of the academic year. Her daughter, also a student at Blue Sky, was dealing with an

intense mental health crisis. Panicked, the other co-founder called me (ostensibly to cancel), but then remembered the open space principles and decided to go through with the meeting after all. For me, the sudden shift in energy beckoned an emergent intervention.

The team needed time and space for reflection. I significantly reduced the number of agenda items I had intended to cover with them, and turned, again, to the Work that Reconnects framework (Macy & Johnstone, 2012) for guidance. The well-flexed muscle of avoiding pain had a tight hold on the system.

> If the metaphor of the resilient organization is that of a constant flow- of energy, caring, support, emotional and practical resources- among members and with careseekers, then the metaphor of the caregiving organization without resilience is that of blockages, of dams and channels and dead-ends that isolate individuals and groups from one another. (Kahn, 2005, p. 52)

I intentionally invited the hurt and fear into the room. If I had learned anything throughout my journey alongside Blue Sky School, it's that, in the right container, vulnerability and openness are the antidote to constriction and fear (Brown, 2012). I held the space, and they made of it what they needed.

Their sharing was cathartic and therapeutic. As said by American psychiatrist Bruce Perry, "therapy is not about erasing old connections and associations; it's about building new ones" (Supin, 2016, p. 10). Rather than retreating into further paralysis and isolation, the team opened up, growing closer together. They used the tools we had explored together to make sense of their situation, to see with new eyes (Macy & Johnstone, 2012), and to trust that together, they could go forth. Their new narrative centered around maintaining the wellbeing of the "co-parents," of

committing to more transparency, openness, and trust. The team was reflecting in action- listening, talking, and sense-making. The reflective part of the brain is what helps us heal. It's also the part that makes us most human (Brown, 2012; Macy & Johnstone, 2012; Supin, 2016).

Using a photo elicitation method[3] to generate reflection and discussion, I invited each participating team member to first select an image that captured what they were bringing to the team, and second, an image representing what they were letting go. I covered a large table in our meeting room with photos of random images, which could evoke various thoughts, memories, or emotions. Photos of nature, sporting activities, animals, people, cityscapes, different work settings, and mythical creatures were included in the photo collection. The images served as prompts, to tell metaphorical stories to bolster appreciation and strength, and to loosen the grip of the pain-points. Their first image focused on a strength- something they appreciate and can bring to the team. Since the photo only offers an image, it is up to the person sharing to create meaning and weave elements of that image into the story they choose to tell the group. The images act as symbols, representing their stories in a concise and visually memorable format. The use of images allows participants to package their stories as something more manageable, therefore externalizing the thing they're letting go (again, in a visual way), creating distance between themselves and the situation or quality that the image represents. I observed that participants chose visually beautiful or bright images to "bring to the team," and that they let go of darkness, fear, insecurity, or "ugliness." Following the image selection and story sharing, the energy in the room felt lighter. Participants seemed to be more connected to one another, and

[3] Photo elicitation refers to the qualitative research method of using photographs to generate verbal discussion (Glaw, Inder, Kable, & Hazelton, 2017).

better understood where their colleagues were coming from, what they were dealing with, and what they hoped to cultivate.

Finally, we captured the concrete steps that the team had taken throughout the project. They recognized what had changed, in what ways they were operating differently, and what risks they had taken (either individually or collectively). They had established increased clarity of role and purpose and set up steps to carry out their vision in present-day operations (such as gathering together as a staff team to address questions of individual and collective wellbeing each week; knowing who to go to for specific types of questions or issues; and developing a clear and feasible agenda for each meeting, with desired outcomes explicitly listed as well). They gained trust in one another's ability to hold diverse stories and experiences without becoming defensive, and begun to see that- contrary to their initial assumptions- there is in fact room for vulnerability in the workplace.

Committing to a similar level of vulnerability in using myself as instrument for change (Seashore et al., 2004), I offered a quote that helped me consciously shift my mindset while I was going through my own emotional difficulties. Instead of asking, "Why is this happening to me," ask "What is this teaching me" (Chopra, 2019). The tears that welled in participants' eyes indicated resonance, recognition, and reflection. I felt proud of myself for putting my learning goals into action by showing up authentically and vulnerably with the client system by sharing my own personal struggles and by setting clear boundaries even when it may have not met their expectations or hopes. I modeled that vulnerability is not only possible, but generative and connective too. *People are people, and people like people*, I thought to myself. *If only it were easier to be a person!* The work we shared together demonstrates that it might not be easy to

build trust and show up authentically, but it is certainly possible, and perhaps most especially critical when the going gets tough.

Discussion

My own time on earth has led me to believe in two powerful instruments that turn experience into love: holding and listening. For every time I have held or been held, every time I have listened or been listened to, experience burns like wood in that eternal fire and I find myself in the presence of love. This has always been so. Mark Nepo (2005)

Research Context

Practices of reflection-in-action help people work together to better understand the situations they find themselves in, and to enhance their capabilities for action (Putnam, 1999). At first glance, this project appeared to be about clarifying vision for a start-up experimental organization. With further dialogue, exploration, and relationship-building, it became clear that Blue Sky School was a caregiving organization in need of spiritual and emotional revival. In a courageous, authentic, and intentionally designed environment, the team at Blue Sky was able to develop more trust, transparency, and structure to build capacity for individual and collective success. This illustrates the power of modelling and of creating a container that allows for the client system's needs to be met. Trust cannot be created until fear is reduced through courage. Transparency cannot be accomplished unless someone is authentic. Structure cannot happen unless designed. This case study demonstrates that the marriage of self as instrument of care (Schwind et al., 2012) and process consultation is core to elicit learning, growth, and change in a human system. It is the fundamental basis of process consultation to work *with* people that allows these shifts to occur (Schein, 1999). This approach helped the client situate themselves

within the context of their presenting problem in a new light, and to empower them to reimagine a more desirable future (Emery, 1999) not only for themselves, but also for the learners, families, and community they serve.

The primary approach for this project has been through a lens of narrative reflective process. Specifically, exploring the power of metaphor, storying, and dialogue to develop self as instrument of care (Schwind et al., 2012). In concrete terms, this means that I worked with the client system to elicit their current narrative (which directly involved the problem(s) they were facing), to build the team's capacity to share diverse perspectives, and to then recreate—or retell—a story that met their needs as well as with the needs of the population(s) they serve. Metaphor, storying, and dialogue can help an organization build trust, increase openness, and deepen their reflective practice (Macy & Johnstone, 2012). Based on the idea of the *social construction* of reality (Cooperrider & Whitney, 2001), the power of these outcomes are linked to a poetic principle and an anticipatory principle. The poetic principle suggests that meaning within a human system is constantly changing, being co-authored, and co-interpreted. Therefore, human systems are stories open to interpretation and re-storying. The anticipatory principle proposes that our collective imagination, care, and hopes for the future drive us forward. Therefore what we anticipate is what we enact. We have the power to imagine the future and project it into life, making it simultaneously present and mobilizing. By imagining what we want, reflecting upon what we have, talking about where we are, and designing where we can go, we have the capacity to truly change the course of our lives and the lives of those around us. This is the power that I witnessed in my project as I facilitated the coaching session, presented the feedback to the whole system, introduced a process to develop and action plan, and held space for collective reflection.

While working with a system that was afraid to take the leap into vulnerable and open terrain, I utilized my own reflective practice to model what was possible. Seashore et al. (2004) state that reframing is an important skill to influence effective change. By asking open-ended questions, directing the system to appreciation and gratitude, and focusing on commonalities instead of differences, the client system was able to reframe their problematic situation into a manageable plan of action. The fine balance between task-oriented action and reflective practice for healing was explored in this project. As supported by Supin (2016), holding space for pain played a critical role in recreating new patterns and pathways for this (exhausted) caregiving organization.

Our capacity for empathy and compassion increases when we're able to explore the hurt places within others and ourselves, with curiosity and care (Brown, 2012; Nelson, 2019). The shared human condition is one of vulnerability- a realization that can serve as a balm to wounded flesh and spirit. When members of Blue Sky School trusted themselves enough to be authentic and honest, such as in the action plan or reflection session, they learned that they are more connected to their colleagues than they thought. Reflective narrative processes were employed to provide time and space for the people at Blue Sky School to bond, share consensus, and create new realities (Delgado, 1989). Additionally, these perspectives creating new realities align with feminist discourse and critical cultural learning theories (Tarule, 1996). In order to construct new knowledge and reconceptualise our relationship to power, voice must be utilized. Voice acts to illuminate what lies beneath the surface, to concretize feelings into thought and action, and to get to the heart of an issue (Patterson et al., 2012; Tarule, 1996). The Blue Sky School system is primarily populated by women. In correspondence with the feminist approaches described by Tarule (1996), relationships were emphasized as being central throughout the learning process,

by consistently gearing team members' attention towards what is shared between them. Sharing voices, perspectives, stories, and metaphor helps to not only build deeper relationships but to also develop trust (Covey, 2006). By moving through the spiral of the Work that Reconnects (Macy & Johnstone, 2012), this process consultation project became a site to honour what's real, to socially construct meaning, and to expand awareness, compassion, and care in the system.

Recommendations and Reflections on Process Consultation

Although there were many successful elements to this project, there is plenty of room for improvement. Firstly, I question the sustainability of the client system's growth and change, as they have not yet established a pattern of self-regulating or incorporating iterative feedback into their norms and practices. Part of this is connected to time, and they have simply not had the time to develop sustainable habits since beginning their work with me. Related to this, and reflected in the data theme of "dependency," I have a concern around the role I played in the system, and whether I was seen as a "saviour" figure to the client. Given the scope and parameters of the academic year that Blue Sky operates on, we were on a tight timeframe to complete this project, but I would be curious to see what other possibilities could emerge if we had had additional time together.

A shortcoming during this project was not enough scaffolding for the client system to build capacity to facilitate their own decision-making processes or action plans. I intend to check-in with the co-founders in the coming months, to see how they and their colleagues are faring. I would encourage them to examine the roles they each play in the system, to build more capacity to maintain the successes of our work together without my presence. Rather than waiting for an external source (such as myself) to spark change or intervene on their patterns,

they could continue to develop internal capacity. I trust that this is possible so long as they commit to engaging in courageous and authentic dialogue amongst themselves.

It is my greatest hope that they harness the authenticity, trust, and transparency that we worked on together moving forward. At the moment, however, there is no guarantee that such is the case. A few comments in the feedback and closure with the client system indicated that they viewed me as instrumental in their change process. Although I've written about self as instrument, and have in fact been "instrumental," it is not my intention to leave the client system feeling like they need me as a tool to fix their problems. The purpose of building their own capacity, from within, to expand awareness and practice open dialogue, was precisely to prevent the "need" for an external consultant in the future. For now, they have experienced the positive individual, interpersonal, and organizational impacts of direct communication, openness, and authenticity, as well as using tools that served their quest for clarity in action (such as the open space principles, the Work that Reconnects spiral, and Emery's (1999) rationalization of conflict model), and continue to lean on one another for support.

Had there been more time, I would have slowly phased myself out of the system, doing less work directly related to structural changes and more connected to supporting others' initiatives to take action or start crucial dialogues. Ideally, this would deconstruct the sense of dependency and questionable sustainability for Blue Sky's self-improvement journey. I hypothesize that if the client system had more time to practice facilitating their own change, they would develop even more confidence in themselves as leaders (and as a cohesive team). Connelly and Clandinin (1990) remind us that each experience builds upon the previous one, and when intentionally reflected upon, it provides an opportunity to make informed choices about the direction of our future. Similarly, Peggy Holman (2010) paints a picture of a dialogical space

where people's needs can overlap, positions can be suspended, and interests can be pursued for the sake of a better quality of life for all. Leaning on these concepts, I think there is still room for Blue Sky School to continue building upon their experiences to strengthen their successes and rewards that they felt during our time together. It is my wish for this caregiving organization to develop sustained capacity to care for and nourish themselves as much as they care for and nourish their learners.

Conclusion

The narratives we choose to live by and believe in shape the way we engage with the world. Our stories become us; or rather, we become our stories. For a caregiving organization experiencing uncertainty, a lack of clarity, paralysis in decision-making, and emotional exhaustion, reimagining and retelling a new narrative can create a greater sense of wellbeing and connectedness. To show up authentically is to accept oneself as is, to be true in thought, word, and deed. Authenticity builds trust and challenges the notions of shame or unworthiness (Brown, 2012) that we are too-often taught in today's society.

Everyone has an authentic self— it's accessing the courage to allow our true colours, emotions, and vulnerabilities to emerge that presents a challenge in the pursuit of authenticity. In process consultation, the consultant can use the self as instrument to model authenticity, trust-building, and clear communication with the client system. Perhaps this little nudge of encouragement is precisely the push that's needed for an organization to step outside of the status quo.

Particularly within the context of a caregiving organization, if we are to support each other through adversity, we need trust and hope to create authentic dialogue and diverse perspective sharing. Personal knowing is instrumental in the development of understanding oneself, others,

and the whole. Narrative reflective process guides people to "increased self-awareness, discovery, and (co)-construction of knowledge" (Schwind et al., 2012, p. 225). These exercises help build the capacity for a more empathic, connective, and nourishing work environment.

Like a midwife helping to deliver someone else's perfect baby into this world, it is my role as a process consultant to see each individual and each group with fresh eyes, a compassionate heart, and an open mind. I am thankful for the struggles and vulnerabilities that overcame me during the course of this project, for they helped clear the path of judgement and deliver me to the client system raw, authentic, and human. If trust builds trust (Covey, 2006), then I'd suggest that humanity builds humanity.

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Appendix I

Semi-Structured Interview Questions to be Recorded and Transcribed

(30 mins)

Time & Date: _____

Name: _____

Role(s) at Blue Sky School: _____

1. From your perspective, what are the most important elements of Blue Sky School's vision?

2. How would you describe Blue Sky School's current way of operating?

3. What do **you** need in order to bring Blue Sky's vision to life on a day-to-day basis?

4. What actions or steps do you suggest in order to start embodying the school's vision and mission in your daily work?

5. If you had a magic wand at Blue Sky School, what would you -

- Add?
- Change?
- Remove?

6. Is there anything else you'd like to add or share?

Appendix II

Purpose to Practice Process (Liberating Structures, n.d.)