

## **LEADERS AS LEAD LEARNERS:**

### **A Cooperative Inquiry into the Question: *How can we be more effective in helping others become more strategic, conceptual, and creative in their thinking?***

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In early 2003 a group of community organizers along with two facilitators from academia engaged in a systematic process of cooperative inquiry, exploring the question of “*how we can teach people to be more strategic, conceptual, and creative in their thinking.*” Cooperative inquiry (CI) is *a process of repeated episodes of action and reflection through which a group of peers strives to answer a question of compelling interest to them.* Organized as part of the Leadership for A Changing World (LCW) Program funded by the Ford Foundation and organized and administered by The Research Center for Leadership in Action at the Robert F. Wagner Graduate School of Public Service at New York University, We came together around this inquiry question, because of a shared sense of organizing actions along were not enough to sustain our organizations. While we were effective on some level, we had the same number of primary leaders as seven years ago. We knew we were becoming stale.

The members of our group were three LCW awardees, Vicky Kovari, Rev. Tyrone Hicks, Larry Ferlazzo, two additional participants suggested by Larry, Mary Ochs, and Craig McGarvey. The three awardees are experienced community organizers (Larry changed jobs during the inquiry, accepting a position working with emotionally challenged students in a middle school), as is Mary who works with community organization facilitators and leaders. Craig is experienced in working with organizers both as a foundation officer, and as a consultant to foundations. The group was facilitated by Lyle Yorks, a member of the faculty of Teachers College, Columbia University and an experienced CI participant and facilitator, and Lucia Alcántara, a Doctoral Candidate at Teachers College, who is also experienced in CI.

Our group began forming in late fall of 2002 during a program wide meeting of awardees. Through a few early E-mail exchanges an initial conference call during January 2003 potential members shared with each other what they would want to get out of participating in a CI group that would make spending the time and energy worth while. This commitment was reinforced during the March 2003 program wide meeting.

#### **How we came together: The Power of the Question**

As defined above, cooperative inquiry is a process where a group of peers organize themselves around an inquiry question of compelling interest to them. The question was truly compelling to our members, motivating the decision to participate in the CI process, although there was more to it than just the question itself; it was also who was making the invitation and who else would be participating. Vicky, who initially did not plan on participating in one of the research options of the LCW program, comments:

*When Larry came up to me with the idea for the inquiry question it drew me in. We had just finished our big issue meeting with 5,000 people. Some task forces were created around the issues, but the work of getting them in shape fell on a few others and me. I was thinking this has got to change. We need other people thinking about this. The strategic part of it hooked me. Plus the other people who would be around the table talking and taking action on the question, I could see that as being valuable.*

Tyrone had a similar experience, commenting:

*When Larry started talking to me about the question, I began to see myself getting involved. I was seeing how this could help organizers and leadership accomplish their work—leading successful actions and evaluations. Organizers are always talking about going broader and deeper and we are missing that—we turn out the numbers at actions but are not going broader and deeper. If we don't develop people and if a key person is missing during an event it's a problem. There needs to develop an expanded core of leadership in our organizations. These comments refer to conversations between Larry, Vicky, and Tyrone during the fall 2002 program wide LCW meeting. Other LCW awardees also expressed strong interest in the question, but because of various reasons, including work schedules and pressures, job changes, and competing developmental opportunities opted out, opening the opportunity for Mary and Craig to join the group.*

What appealed to Mary was the idea of being in a conversation “with experienced organizers and other people that focused on trying to figure out what we can do to get unstuck. The world of community organizing is in a bit of a rut. We are doing more and better organizing, but we are still getting our butts kicked. We need to try something different. What got me was that this process would help me to create a space where I could get off the trend mill and think about organizing. So it was much broader than the question itself.”

Craig was also attracted to the idea of the process and a practical question. He was also interested in being part of a conversation that would include Larry's transition to teaching. “I spent twenty years as a teacher. That is the lens through which I look at everything. I knew about Larry's transition from organizing to teaching and I was attracted to Larry's creativity.”

We asked Larry what motivated him to pose the inquiry question. He shared a conversation he had some time ago with a leader in the IAF organizing network who, in discussing some top organizers in the IAF, commented how “one organizer had taught me the skills of organizing, but another had taught me how to think.” That insight, the difference between skill and thinking, had stayed with Larry. Because Larry was weighing the idea of transitioning to teaching he was in a more reflective space than in years past. He wanted to help students to learn to think, which is at the heart of democracy. He felt this process might help him to look at that short coming in both organizing and teaching.

### **How we functioned as an inquiry: The cycles of reflection and action**

We engaged in six cycles of reflection and action. Our first meeting was held in August 2003 in St. Paul, the second took place in San Francisco in November, the third meeting was held at Teachers College in New York City in January 2004, the fourth in Boulder, in connection with

the March program wide meeting, and the fifth meeting in Sacramento. A sixth meeting was again held at Teachers College in mid-August, 2004.

Evidence of open participation and the building of the learning capacity of the group are fundamental values of CI. We believe the record of the group demonstrates the 'states-of-being' criteria offered by Lincoln (1990) for assessing the trustworthiness and authenticity of qualitative inquiry:

*fairness* — does the record demonstrate that the viewpoints of participants have been given evenhanded representation and given space to be heard?

*ontological authenticity* — the extent to which there is evidence that participants have gained increased awareness of the complexities of the issues surrounding the problem.

*educative authenticity* — the existence of evidence that participants have gained increased appreciation for the sources of alternative positions around the problem.

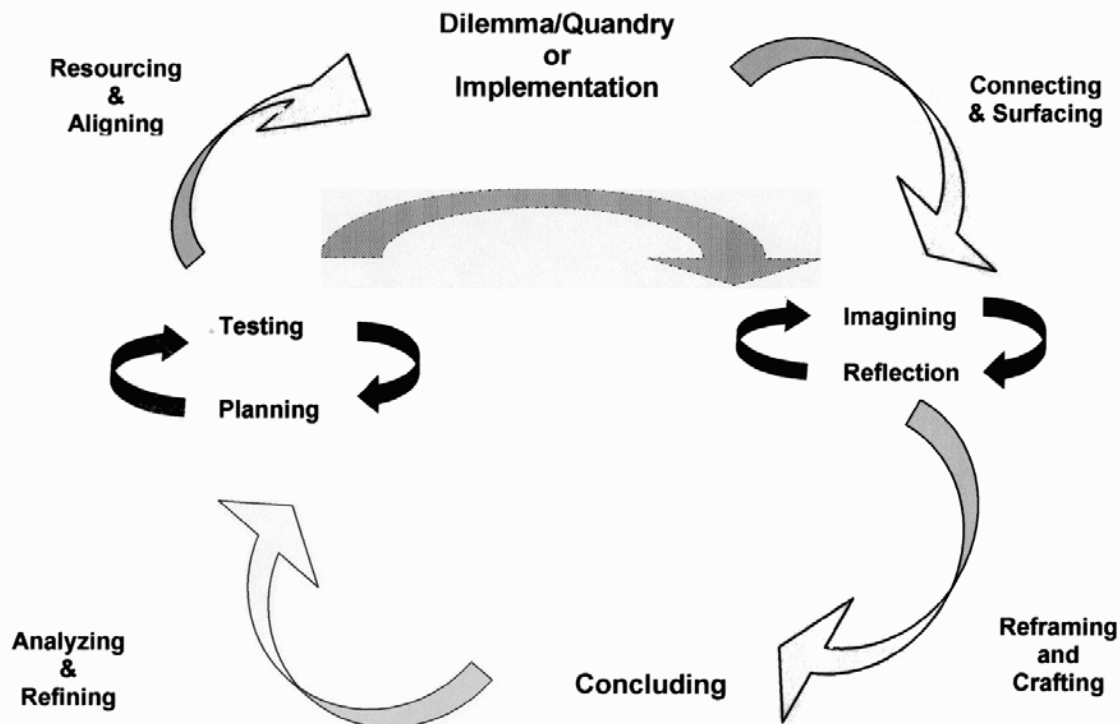
*catalytic authenticity* — establishing that co-inquirers have a willingness to be involved in change.

These criteria speak to a key marker of valid cooperative inquiry; that it has produced change in the co-inquirers and their context (Heron, 1996; Reason, 1992). The reader is invited to make his or her own judgments regarding the extent to which these criteria are reflected in the group's process as described below. This description is intended to illustrate both how the inquiry progressed, and the foundations for the meaning making and conclusions that emerged. An sampling of the actions taken is provided for purposes of illustrating the process.

### **Our First Meeting: St. Paul, MN, August 8<sup>th</sup> and 9<sup>th</sup> 2003**

Following a brief review and validation of the inquiry question, the focus of our discussion was on strategic thinking for community organizers and why we thought the question was important. We told stories about how we believe we had personally developed a capacity for strategic thinking, and why many of the people we worked with were not exhibiting this capability. At the suggestion of Larry the meeting started with a brief presentation by Lyle on a framework for thinking about strategic learning (see figure 1). The presentation led to a rich discussion in the group about the learning process.

## Strategic Action Learning Cycle



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Figure 1: Strategic Learning Cycle: Based on C. Palus & D. Horth, *The Leaders Edge*, Jossey-Bass, 2002

While this initial conversation seems theoretical, our conversation was around making connections with how we functioned in our roles as trainers. Specifically the focus of our discussion was on what methods help people work through the strategic learning cycle and how these methods related to our experience. For example, Tyrone noted that even when we do evaluations of our actions, it's more a critique of performance, 'like who did what' and not what you learned about yourself or from your role.

In reflecting on how we conduct evaluations it became evident that: 1) participants in our evaluations were only those people who we invited, usually the same ones, 2) the instruments used in evaluating actions were formatted in a rote manner, and 3) the process used to conduct the evaluations was non-directional and routine. The insight from the discussion was that primarily senior staff members were looked upon as our organization's pool of strategic thinkers, and that others had little opportunity for experiencing strategic discussions.

We began to consider a different view of what purpose evaluation served in our organizations. Vicky's comment that, "Organizers can be action junkies," met with agreement from the group. Mary talked about "messing with evaluations a bit." "Maybe have people do skits about what happened." This would make it different from the stale evaluations that are normally done.

The need for ‘shaking things up’ became a theme of the meeting. Tyrone talked about shaking up his Sunday service. At a later meeting he would report changing the worship service, doing the service backwards, starting with the benediction. While this initially created some confusion, many in the congregation realized how routine and habitual their worship practice had become. New conversations about the meaning of faith and action were created. In reflecting on this experience Tyrone later wrote:

*The reaction of the people was mixed on doing the church service backwards. The majority saw it as refreshing and a move from the traditional. I don't know if the reaction would have been the same if I had warned them in advance. It is the same as having a script and just following the script without any creativity or spontaneous action. Some of the best moments are when we allow the creative juice to grab us. Some of the greatest learning and teaching moments come when we have ‘ah, ha’ moments and it causes us to examine more closely why we are doing what we do. It also creates space for moments of reflection.*

Lyle introduced a couple of inquiry tools, namely the ladder of inference, the learning window, and left hand column exercises that are useful for facilitating learning and validity testing in CI (Figure 2).

## Learning Practices

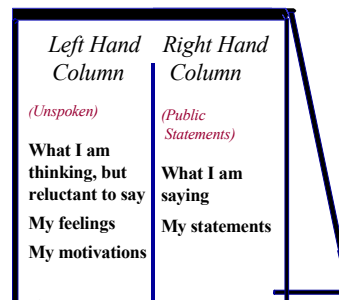
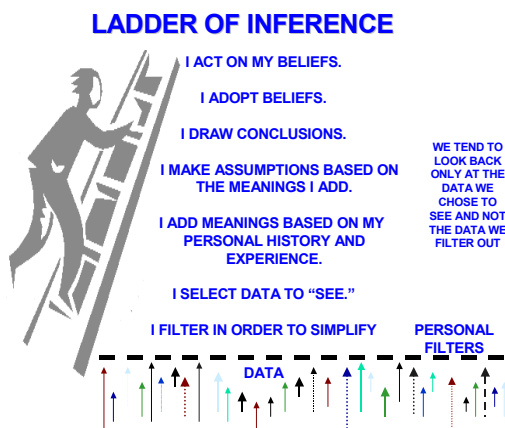
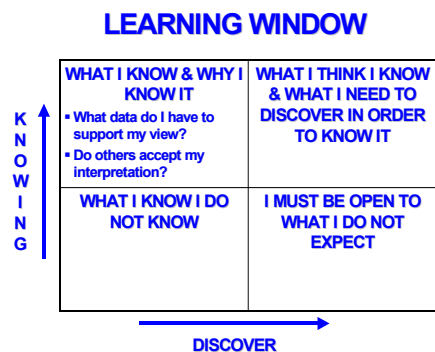
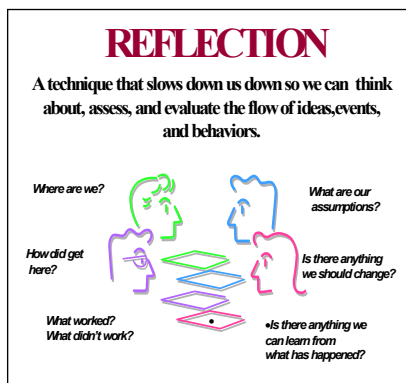


Figure 2: Learning Practices introduced into the Inquiry

Reflection on experience has emerged as an important learning practice for translating experience into learning in both our work with our organizations and in our inquiry. Reflection is a critical element of inquiry; both reflection on what others are saying and on one's own assertions and reactions to what is being said. One way of structuring a reflection is to ask people to reflect on what is in their '*left-hand column*' -- what people are thinking, but not publicly stating (Senge, 1990).

Two concrete tools for fostering reflection and testing assumptions are the ladder of inference (Argyris, 1993) and the learning window (Stewart, 1997). Both are metaphors for thinking about the difference between attributions and taken-for-granted activities, and action based on data and testing assumptions.

The first rung of the ladder of inference is comprised of actual observations in terms of what, descriptively, we have seen or heard. For example, someone's posture or facial expressions during a meeting, or the comments someone makes during a tense discussion. The second rung refers to the meaning we attach to these observations (the person is disinterested or has a hidden agenda). The third rung is the attribution we make about causes (they aren't very capable or want to protect their turf) and the fourth rung is generalization (these people are all like that). Generally, we subconsciously move up the ladder instantaneously, reacting to events through our existing frames of references and taken-for-granted assumptions. Using the metaphor of the ladder, a group identifies the data that are basis for their attributions and reflects on alternative possible explanations and ways of testing their assumptions.

The learning window was one of the most powerful tools used during the inquiry for critical strategic thinking (see Vicky's example of her transportation campaign in the section on creating space for conversations below). The metaphor of the learning window is a 2 x 2 matrix that provides a mechanism for: (1) testing the level of confidence in what we know, (2) identifying a need for further data collection and testing of assumptions, (3) exposing gaps in our knowledge, and (4) reminding us to be open to questions we never thought to raise. For example, in Quadrant I, we are asked to meet the test of "*What We Know and Why We Know it.*" In response, we must explicitly provide any evidence that we are using to support a particular claim and everyone in the group must agree about its interpretation. Failing to accomplish this, in whole or in part, requires that we test the claim further, collect and/or present additional evidence for discussion, or accept our claim as something tentative—which leads us to Quadrant II, "*What We Think We Know and What We Need to Discover in Order to Know it.*" Responding to this question forces us to frame clear hypotheses and identify specific sources of evidence and the methods necessary to meet the criteria associated with Quadrant I. The remaining two "panes" of the learning window focus on "*What We Know We Do Not Know,*" (Quadrant III) and remind us to "*be Open to What You Do Not Expect*" (Quadrant IV). Throughout this process, conversations often surface additional unknowns that are brought into the group's awareness.

During this first meeting there was a gradual shift in our assumptions about the inquiry question. We began to realize that we had to look at how we involved people in the process of setting strategy and create contexts in which they could experience strategic thinking. Our actions and relationship to others would need to be part of the question. For the next couple of meetings this shift in perspective fluctuated between how we *teach* people to be more strategic, creative, and conceptual and how *we can be* more strategic, creative, and conceptual in working with people to foster this kind of thinking.

## **Our Second Meeting: San Francisco, CA, November 6 and 7, 2003**

Our second meeting was held in San Francisco. During this meeting the shift in the question to how we can become more strategic, creative, and conceptual became clearer. This shift is significant because it contains the roots of the idea that to help others become more strategic, creative, and conceptual we have to *be* more strategic, creative, and conceptual *in relationship with* them.

This meeting began with a reflective discussion of what actions we had taken based on the learning from the first meeting. Vicky shared how subsequent to our meeting in St. Paul, she had introduced some reflective processes into her meetings with leaders from her community action groups. Her group went through a process of trying to get leaders and staff to reflect on where they had been and changing strategy. In particular her transportation campaign was embarking on a whole new thing, going to the people and not the legislature. She described how this process had been well received and gave examples of how she had used metaphors in getting people to think differently about the challenges they were facing.

Larry had recently changed jobs taking a position as a schoolteacher, although he continues to be supportive of his former colleagues. He discussed how the ideas he has been working with as a function of the inquiry has transferred across roles. Tyrone and Vicky shared their ideas for some up-coming events.

At Larry's suggestion, Larry Gordon, a well-known and talented organizer who has engaged in personal scholarship into the work of Hanna Arendt, visited our meeting and spoke with us for a couple of hours. He spoke about the importance of bringing people into the polis and the creation of the space to do critical thinking is what organizing is all about.

Vicky remembers that at the start of Gordon's presentation she was afraid it was just going to be an academic exercise. "Then I asked myself the question, 'what does this mean in my own organization?' The distinction between politics with subjective citizens versus ideology with people seen as objectified consumers is very powerful. People always say to us (organizers) 'tell me what to do': we say 'do this' The difference between subject and object is the difference between someone encouraged to say 'I think we should' and 'tell me what to do.' We do all the strategic and creative thinking and wonder why they aren't thinking strategically." Tyrone reinforced Vicky's comment, saying, "We are not clear about creating space. What is missing is time and involvement."

Larry Gordon's discussion continued to resonate with us throughout the remainder of our inquiry process. We need to create better learning environments in our organizations. We already have the action environment and that's important. Without the action there is nothing to learn from. However, we need to create the space for learning, and to model it. We have come to see this as the difference between dealing with people as subjects, versus treating them as objects in our training. Breaking down ideologies in which by definition the idea is divine and recognizing that critical thinking is what happens between us.

We have also continued to recognize the need for balance. Listening to thoughtful academic analysis is valuable when people are engaging in inquiry and the analysis is relevant to their experience and future actions. This was why Larry Gordon's presentation was so powerful for

us. It was a prepared presentation, but Vicky, for example, focused on the implications for our inquiry.

Later in the meeting our discussion shifted to metaphors. As a CI group we were struggling with understanding what it means to think strategically, conceptually, and creatively. What do those concepts look like in practice? We decided to use metaphors ourselves to help us better understand these abstract concepts. What emerged was the metaphor of dots. We put dots on a large sheet of easel paper. Each dot represented a different stakeholder. Strategic thinking required connecting the dots in ways that would create space. The ‘connect the dots’ metaphor was utilized as a vehicle to further our interpretation of what strategic, creative, critical and conceptual would look like in an exploratory reflective conversation.

- Creative – What should the dots look like and how many different ways can they be arranged or re-arranged?
- Critical – Why do we need dots, and should they be connected?
- Conceptual – What is the meaning of dots? How are the dots best connected? What or how do we learn from them once they are all connected? How do we know the dots exist?
- Strategic – How do these dots relate to where future dots may go? Where might other dots be now?

This exercise demonstrated the interdependence of these concepts. Creative, conceptual, critical, and strategic thinking are not synonymous with one another. One can be creative and conceptual, and not strategic. However, effective strategic thinking is both creative and conceptual. Further, the dots are metaphors for people, organizations, institutions and policies, etc. in the strategic political terrain.

As we drew closer to the end of our session, we began to talk about future action items. Larry stated he would engage in more thinking about the essential ideas he wanted to explore with his students “how can you do that practically?” Craig committed to reading “We Make the Road by Walking.” Vicky agreed to consider asking two critical questions when she asks her leaders to reflect on their goals during re-negotiation of their contracts at the next staff retreat. Coincidentally the staff retreat was scheduled to take place before our next meeting. Her expectations were that the question should challenge the assumptions of what they wanted to do.

### **Our Third Meeting: New York, NY, January 26<sup>th</sup> & 27<sup>th</sup>**

In attendance were Vicky, Craig, and Mary. We had agreed to connect with Tyrone through a conference call later on in the first morning. Larry was teaching and couldn’t attend. Based upon our interaction with Tyrone and his expressed interest and enthusiasm we made two conference calls; one during late morning of the first day, the next call was made mid-day on the second afternoon. (At a later meeting Tyrone commented on how important face-to-face communication is to the process.)

It is during this meeting that we truly realized how we related to our staffs would serve to enhance or hamper strategic, conceptual or critical thinking in our organizations. Our inquiry question shifted to asking “*how can we become more effective in developing leaders in our organizations who are more strategic, conceptual, and creative in their thinking.* We further

came to realize that developing people, as opposed to teaching them, required a change in how we positioned ourselves with them—we had to engage them in the process where we were becoming more strategic, creative, and conceptual ourselves. Continuing to do the same things, while expecting a different outcome was nonsense. This focus was seen as fundamental to helping others become more strategic, conceptual, and creative in their thinking. At this point we had all engaged in at least two cycles of action and reflection. The questions and probing became more objectively critical and as such served to further the exploration of other means by which to achieve the desired outcome of helping others to think more strategically, conceptually, and creatively, by engaging in this kind of thinking with them; and in the process foster this kind of thinking in ourselves.

The meeting started with a focused check-in. During this enhanced check-in we took as much time as needed to focus on each of our activities. This turned out to be a key strategic move in deconstructing our actions and generating reflections with subsequent learning.

Vicky began her reflections by drawing a connection between her raised awareness of the patterns that emerged among staff roles at a recent fund raising event for organization and a well known biblical story, the parable of Mary and Martha. *“As Jesus and his disciples were on their way, he came to a village where a woman named Martha opened her home to him. She had a sister called Mary, who sat at the Lord’s feet listening to what he said. But Martha was distracted by all the preparations that had to be made. She came to him and asked, “Lord, don’t you care that my sister has left me to do the work by myself? Tell her to help me!” “Martha, Martha,” the Lord answered, “you are worried and upset about many things, but only one thing is needed. Mary has chosen what is better, and it will not be taken away from her.”* Vicky reflected on how, at a meeting following our initial inquiry session, she was aware of how members of the organization were busy setting up and cleaning up while the same people were sitting at the head table. Her reflection captures our own struggle with establishing the balance between action and reflection, task and relationship, task and learning. Early in our inquiry we were stuck by the realization that in our work things seemed out of balance.

Vicky also shared her reflections on the statewide training that was conducted in November where she did a presentation on strategic thinking using some of the materials presented by Larry Gordon at the last meeting. Her presentation was last and the evaluations indicated that her presentation should have gone at the beginning, and thus help to frame the retreat. At our sixth meeting Vicky commented how even at this retreat she was still doing it to them, making a PowerPoint presentation, rather than involving people.

The discussion turned towards the relevance of questioning assumptions for avoiding the perils of ideology. Some of the examples discussed included playing devil’s advocate and critical thinking exercises as tools for facilitating collective reframing of issues. We delved into an extensive discussion of practical approaches and applications of these concepts in their local communities.

As we concluded our discussion the subject of framing organizers as adult educators re-emerged (pointing toward the educative role of leadership). We agreed that during our next meeting we needed to focus on sharing our actions, reflecting on them, and beginning to organize our learning.

## **Our Fourth Meeting: March 27 – 28, 2004, Boulder, Colorado**

Present were Larry, Vicky, Mary, and Craig. Through out the past several months we had been actively working to apply the fruits of our CI experience to our professional lives. Consequently, we could now see evidence of both the transferability of our learning to our professional activities and had experienced some disappointments in the responses of members of our organizations to our attempts to implement new methods and strategies. However, despite the disappointments, we found we achieved successes in different areas and seem to have expanded the thinking process of some of our colleagues and stakeholders.

Mary commented that in the beginning you have to build a sense of shared fate and identify the end result. She shared how she made a decision to use story telling as an icebreaker for the first hour of the meeting for community organizers and leaders. She encountered a chorus of resistance from her immediate colleagues when she told them what she was going to do. Mary said she was going to ask people to tell a story about their personal history or their family's history with voting. "My colleagues said no, no, nobody will have anything any to say. We have too much to do." Mary decided to do it anyway and the stories were absolutely amazing. Everyone saw the point of the exercise. Their stories grounded the meeting, not only in what they were going to talk about, but got at the deeper purpose. Collectively the stories were a microcosm of the types of values, experiences, and barriers the people would encounter when doing voter work. By putting out stories they also learned something about each person. Mary reports "you could feel a different sense in the room after we did it—a shared sense of purpose and shared fate." It changed the character of the subsequent discussion and got people thinking beyond the immediate election, what they wanted to accomplish long term. Our experience with stories and their power got us into a fairly deep discussion of what a powerful learning strategy stories are.

Another example of how the CI participants began thinking about new ways to facilitate learning also comes from Mary. *"I wanted the participants at this particular training to think strategically about why they were doing voter work. What their goals are and what they want to get out of it. The way that I wanted them to reflect on this was to imagine that they were writing a news article the day after the election, and their voter work got noticed by the powers that be and the press. What would the headline be and what would some of the comments from their leaders and decision makers from the community be in the news article?"* Mary contacted all of the organizations by phone a few days before the training to give them time to think about the assignment. She reports having had some reluctant participants, but they all showed up with something. Upon arriving at the meeting she handed out butcher paper to the attendees and asked them to write the headline and some of the points to be covered in the story. Mary reports this technique got the attending organizers to focus on the larger picture beyond the candidates (Bush or Kerry) *what does it mean for their organizations? What's the message they want the public, their leaders, and decision makers to see?* This moved the organizers to think more about long-term strategy and goals rather than the immediate needs. *It's exactly what I was trying to get people to think about. What does this mean in terms of message and positioning if you were going to write the article the next day?*

The exercise also worked as a way for the participants to get to know each other's organizations as well as framing concepts for development throughout the training. Some participants said they

would use this idea in their home organizations to further their conversation about goals and strategy.

Larry shared how early in his experience working with in a classroom of behaviorally challenged students he asked them to write their primary goal for the year, for their lives and choose what kind of relationship with him would help them to achieve that goal. He kept a sign on the wall saying “Is what I am doing or saying, or what I’m thinking of doing or saying, going to help me achieve my goal?”

We noticed how in Larry’s stories of actions he was taking with his students how he was being strategic in how he addressed problems in the classroom. Further he was most effective in helping his students be conceptual or creative when he was intentional about creating a new experience, rather than using a prior lesson plan. Most importantly, he avoided the advice of many teachers to “just tell them.” Once he was doing a unit on density and buoyancy and having the students experiment with various objects, some of which floated and some of which didn’t. In order to carry out these experiments, he needed to borrow some equipment from the regular science teachers. Finding the Department chair eating lunch with three of her colleagues he explained why he needed the equipment. They made some disturbing comments about the intellectual ability of the students and said it “would be too complicated and messy to have them determine it on their own.” They all told him I should just “tell the students the density of water.” Larry did the experiment as he planned and it worked great. Later he “reflected on how often as organizers we are like these experienced teachers. We often feel so task oriented that we don’t take the time to help people learn. We already know exactly how to do the next step, so we train people to do it, rather than creating a ‘lesson plan’ that helps them to discover how to do it.” This meeting provided the seminal reflections that became the basis for sense making of our experience in our fifth meeting. Repeatedly we found that we were most effective in generating strategic and creative thinking in others when we were venturing onto new ground, experimenting, and trying something new. Over lunch at our fifth meeting, Tyrone talked about the importance of getting people to work without a script. “Going into a meeting with the Mayor, we knew what the outcome should be, what we were trying to accomplish, who was going to do what, but no scripts. People had to think about what they were going to say. It is a question of balance. Not being unprepared, but having people capable of responding to the unanticipated.”

### **The Fifth Meeting, Sacramento, CA. June 2004**

During this meeting we reflected on our experience during the past ten months, the action that we had taken and the lessons we thought we had learned. We further reflected on the stories of actions that had been shared during previous meetings. In reviewing our stories of actions taken and their consequences we surfaced underlying themes that had relevance for our inquiry question. These themes are threads of a web, each reinforcing the other. They capture insights that emerged in our diverse settings and have implications for how we think about and how we pursue our work as leaders in community organizations. Consequently, they not only provide insight into our inquiry question, but relate to the broader issue of leadership as well.

Fostering strategic, conceptual, and creative thinking in the context of community organizing is part and parcel of the leadership role. One has to build a civic community. In the words of Craig, “1) You engage people--you start where they start, 2) look for the intrinsic motivations, 3) focus on learning, 4) focus on relationship building. Nobody can understand unless it connects with

something they already understand. The intangible is thinking intentionally about what people will get out of a training, designed with their interest in mind and with relevance their lives, and provoke them to connect the end result to their lives.”

### **Enactment Rather than Reenactment**

Part of positioning oneself within the process as a lead learner is creating situations of ‘enactment’ rather than reenactment; posing a problem, challenge, or dilemma and working with others through a process, being open to new solutions and approaches, rather than simply replicating what has happened before, or following a script. We use the term enactment to refer to a leader initiating a learning process that has an intention (such as raising strategic awareness), but the outcome that will be produced is not predictable. This is different from reenacting an established structured experiential exercise that is known to illustrate a predetermined principle or outcome. There is an element of risk and the leader must be ready to learn and adapt to the responses of others.

Repeatedly we found that we were most effective in generating strategic and creative thinking in others when we were venturing onto new ground, experimenting, and trying something new. While learning practices like the learning window are powerful and methods such as story-telling and using metaphors open up new possibilities in peoples thinking, fundamentally it is how you relate to the process, as opposed to what you do within the process that makes the difference.

### **Being Self-Referential**

Reflective practice emerged as the key to leading people in a ‘learningful’ way. Craig observed the importance of self-referential systems as the source of consciousness. Reflecting on the sensemaking process we were currently engaging in, Craig commented, “The thing about this exercise is that you meta-think, get up a level and think about categories. This CI asks us to reflect on how we can help other people learn. Just to reflect on that helps us to learn what’s the essential question. You are trying to learn yourself; you can only teach when you are trying to learn.”

In all of the examples of actions, from Larry’s work with students, Vicky and Tyrone with their organizations, and Mary with the organizers, an essential ingredient was having been intentional about facilitating a new way of thinking with people, and experimenting, as in the CI process. Creative, conceptual, critical, and strategic thinking are closely related, but not synonymous with one another. As previously noted, while one can be creative and conceptual, and not strategic, effective strategic thinking is both creative and conceptual. Developing new ways of thinking requires changing how people work together. Demonstrating creatively in one aspect of meeting can change the nature of the conversation in other ways as well.

### **Beginning with the End Result that Links to Peoples Lived Experience**

Strategic thinking involves conceptually thinking about a future that you want to have happen and then thinking creatively about how to get there, and what you are trying to avoid. The concept of thinking about consequences is an element of strategic thinking; what do I want some future situation to look like? What I want; what do I have to do to provide that? And work back. This principle needs to be acted on in how we deal with the system. We are used to having

people come in and follow scripts. You can't affect the system, by replicating the system (using the same process). Vicky notes, "as an organizer my tendency is to give people a map. You know what the steps are. Strategic thinking is an intense rehearsal for the future, so when things happen you are ready. We need to involve others in the process."

### **Creating Space for People to Have Conversations**

In the past we have given lip service to the idea of reflection. However it was always the next action, the need for dues. We learned we needed to create a better learning environment in our organizations. We already have the action environment and that's important without the action nothing to learn from. However, we need to create the space for learning, and to model it. Get people talking and they will have ah-ah moments.

These ah-ah moments can foster relationships by building new empathic connections among groups. We have examples, of this from the use of stories in immigration campaigns. The stories get at what people experience, why people migrate, and how the system is broken, and therefore what the policy should be. Surface the real story of the pain, what we want to do and what strategies will meet that outcome. Where there are ethnic differences, people are able to better understand one another and build strategic bridges.

We have learned that turning topics and issues into questions can spark inquiry, which in turn opens up thinking. Using learning practices, such as the ladder of inference and the learning window, for challenging assumptions and using metaphors are important tools for making this inquiry process practical. Ideas become influential when, through conversation and sharing, they connect with experience.

The use of learning practices to change the strategic conversation is illustrated by how Vicky's organization changed is strategic positioning with the transportation campaign that they have been working on for the past three years. The organization has made major changes in how they undertake the campaign based by her engaging people in her organization in questioning their assumptions through the use of the learning window. Much of their strategy and tactics were on based on what they didn't know. She reflects, "The learning window was a valuable tool for rethinking our transportation campaign. Much of our process and tactics were on based on what we didn't know. Having our actions based on what we knew and being explicit about taking the risk on what we don't know is using the learning cycle. So many of our past actions were directed to the legislature, which was really hostile to us. We were making certain invalid assumptions about those legislators or we were in denial. We just kept thinking we needed to go back to them. Everything we knew about the legislators meant that going back to the legislature didn't make sense for us, this was not a way to go. Talking it through with the learning window, people got it. We began to look at the courts as a better strategy than the legislature. We filed two different lawsuits to try to force changes to the transportation system."

An experience of Larry's illustrates the role of stories and metaphors in both changing and sustaining habits of mind around strategic and tactical conversations. He told this story to a group to get them to think about not rushing into actions, to think about how they were going sustain their organization. He used to live in a house on slight down slope. Every time it rained the wood chips would wash away. "My wife would ask me to plant grass, but I would just go out and get more wood chips and before long they would wash away again. Finally I planted grass

and didn't have to keep going out to buy wood chips." Members of the organization tell continue to tell him that whenever someone is pushing to move too fast someone says, "Remember the wood chips."

In our reflections we have continued to recognize the need for balance. Listening to other's expertise is valuable when people are engaging in inquiry. This was why Larry Gordon's presentation in San Francisco was so powerful for us. It was a prepared presentation, but it was in a context of inquiry, not being an object.

### **Lead by Learning**

We had originally asked how we could *teach* people to be more strategic, creative, and conceptual. What we began to understand during our inquiry was the importance of *engaging* others in the *experience* of strategic thinking. Our own actions and relationships with them would be part of the equation. To help people *learn* to be more strategic, creative, and conceptual, *we* would have to be *intentional* about being more strategic, creative, and conceptual *in relationship with them*. Larry described it as "learning while helping others to learn. You can only teach these three things (creativity, conceptual, and strategic thinking) when you are doing them yourself with others. It is a positioning of your self within the process as a lead learner. It's an orientation rather than a methodology."

A "lead learner," we recognized, would ask different questions: How do *I* learn to become more intentional about being strategic, creative, and conceptual in my thinking? How do I behave, what experiences do I help to shape for people in the community so that they can learn through those experiences?

A big, related assumption was generated as we came to these realizations. Craig put it this way, "We can only sustain positive community change if we are intentional about what people are learning. Both the specific community impact of the action and the learning process of the community actors are important. For true change to happen, one can't exist without the other."

This was another way of talking about the balance between action and reflection in organizing work, exactly where the group had started its inquiry. But it represented a clear, collective recognition that the work was way out of balance. Much earlier, at the first CI meeting, a visiting speaker, a lead trainer in a national organizing network, had made a provocative statement. "We teach people how to act more courageously in the public arena, but we ask them to let us do the thinking." If that statement captured in some part what was troubling inquiry participants at the outset—what had motivated them to join the CI process—Mary put into words where the inquiry had brought them. "I am trying not to use the "training" word any more."

The cooperative inquiry process that had enabled these personal transformations, we recognized, was itself an embodiment of the realizations we had reached. The process had walked its talk. Facilitators Lyle and Lucia had started always where the participants started, from felt experiences and expressed interests. Within the learning cycle of the CI meetings, we participants reflected on our actions, then based on the reflection to go out and try new actions of our choice, and then to come back and reflect further. Academic theories helped us put what we

were learning in a broader perspective, but these constructs were always built up to, from the bottom, never “taught” from the top down.

All of the ideas that grew from the inquiry were exhibited by the inquiry. We were “co-creators” and “co-conspirers.” We “enacted” rather than “reenacted.” Unscripted, we made maps, rather than handed maps to follow. We told stories and turned them into metaphors. While engaging us experientially in the action-reflection cycle CI helped us to learn, and by doing so helped us to help others.

The group has met on subsequent occasions to discuss the most effective way of communicating our learning to other community activists. A booklet, *Don't Just Do something, Sit There* is in the final stages of preparation to be published by The Research Center for Leadership in Action at the Robert F. Wagner Graduate School of Public Service at New York University.

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