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# **“Whose Inquiry Is This Anyway?” Money, Power, Reports, and Collaborative Inquiry**

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**Elizabeth Kasl<sup>1</sup> and Lyle Yorks<sup>2</sup>**

## **Abstract**

Collaborative/cooperative inquiry (CI) is both a method for engaging in new paradigm human inquiry and a strategy for facilitating adult learning. Adult educators who use CI in institutional settings must be aware of potential corrupting influences. The authors alert educators to three factors interjected by institutional affiliation that challenge the integrity of the CI process: financial support, power inequities, and reporting requirements. These factors are examined in three different contexts: inquiries used for dissertation research, inquiries in the workplace conducted for professional development, and multiple inquiry projects sponsored by an institution to serve its mission.

## **Keywords**

collaborative inquiry, cooperative inquiry, dissertation research, institutional contexts, liberating structure

The purpose of this article is to guide adult educators in protecting the integrity of a liberating structure used for both adult learning and formal research. This liberating structure is a type of action research advocated by some adult educators because it embodies principles that they frequently identify as principles guiding good practice (Bray, Lee, Smith, & Yorks, 2000; Yorks & Kasl, 2002). The problem is that the participatory principles that make this process powerful are at odds with expectations imposed by institutional needs for control and accountability. Adult educators who are attracted to the process may diminish its power by unwittingly violating the core values that catalyze the process's potential for liberation and transformation.

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<sup>1</sup>Independent Scholar

<sup>2</sup>Teachers College, Columbia University

We begin our discussion by explaining the process and its defining principles as a form of action research. We show how these defining principles, or core values, are at odds with institutional norms related to control and accountability. After identifying three different contexts where adult educators have used this action research process, we describe their strategies for dealing with institutional needs and concerns and conclude with personal reflections. We have been personally associated with all of the case examples used in our discussion.

## **Cooperative or Collaborative Inquiry (CI) as a Form of Action Research**

Cooperative inquiry is a form of action research advocated by adult educators who adopted the nomenclature collaborative inquiry. To honor the different discourses while connoting the terms' synonymy, we use the acronym *CI*.

CI is a systematic process in which participants organize themselves into small groups to explore a question that all members find compelling. Using repeated cycles of action and reflection that are monitored through robust validity procedures, inquirers examine personal experience to create new meaning (Bray et al., 2000; Heron, 1996). This process is particularly useful for pursuing questions that are professionally and personally developmental, socially controversial, or require social healing. CI is a powerful and robust way of facilitating adult learning experiences that are potentially transformational. Properly enacted, it provides something akin to a liberating structure (Bray et al., 2000; Fisher & Torbert, 1995) or collaborative social space (Yorks, Neuman, Kowalski, & Kowalski, 2007). Research on the process consistently documents its power for personal and social transformation (Reason, 1994; Yorks & Kasl, 2002).

### *Action Research as a New Paradigm for Human Inquiry*

Cooperative inquiry grows out of the seminal work of John Heron, who evolved the strategy, which he originally called experiential method (Heron, 1971), as an approach to new paradigm human inquiry (Heron, 1981; Reason, 1988, 1994; Reason & Rowan, 1981). New paradigm human inquiry embraces a large family of action research strategies such as human inquiry, pragmatic action research, participatory action research, action science, and action inquiry (Coghlan & Brannick, 2005; Greenwood & Levin, 2007; Reason & Bradbury, 2008).

Adult educators Ann Brooks and Karen Watkins (1994) describe important characteristics that mark how these action-oriented, experience-based approaches to research depart from traditional assumptions about how knowledge is constructed and by whom. They note four dimensions of similarity shared by the proliferating approaches: (a) intended result is the creation of new knowledge that becomes the basis for new action, (b) members of the community or organization in which the research is conducted are central to the research process, (c) research data come from the experience

of the participants and are collected and analyzed systematically, and (d) research purpose is to create change, manifesting Kurt Levin's famous phrase that the best way to understand something is to try to change it.

Although the strategies share similarities, their diversity in epistemology and axiology also creates critical differences. Brooks and Watkins (1994) discuss four dimensions of difference: (a) the political frame of the initiators—which may be managerial, with an intention to improve the performance of an organization or social institution, or emancipatory, with an intention to improve the lives of the co-researchers and/or to work toward social justice; (b) the general approach to inquiry—the extent to which the research adheres to traditional scientific method or strives to engage participants in critical reflection and meaning making; (c) power sharing—the degree to which co-researchers share power in making decisions that shape the research process and products; and (d) utility—the ways in which the new knowledge is used, whether it is valued primarily for local application or shared in the public arena (pp. 11-13).

### *CI is Radically Positioned on Action Research Dimensions*

Heron and colleague Peter Reason (Heron & Reason, 1997) have distilled CI's radical nature by describing two participatory principles—epistemic and political.

The political participatory principle dictates that group members share power equally and make all decisions themselves—from deciding the research question to creating the research design to deciding whether and how to share the group's findings with anyone outside the group.

The epistemic participatory principle posits that meaningful knowledge generation can grow only from the knowledge-maker's personal experience; this principle derives from the phenomenological assertion that one can best understand human experience by being inside that experience. Heron and Reason (1997, 2008) describe how an extended epistemology transforms felt experience into practical new knowledge that grounds action. This extended epistemology includes four interdependent ways of knowing—experiential, presentational, propositional, and practical—each with its unique function and canon of validity. Experiential knowing is felt encounter that is pre-linguistic and grounds all other ways of knowing. Presentational knowing is expressed through images and patterns, manifesting intuition and imagination. Propositional knowing is the conceptual and analytic way of knowing that is generally valorized in the academy. Practical knowing is "knowing how" and is perceived by Heron and Reason to be the appropriate culmination of the quest for meaningful learning. They refer to its pinnacle position in the extended epistemology as the "primacy of the practical."

Heron and Reason's participatory principles locate CI on the dimensions of difference identified by Brooks and Watkins. These locations are the key to CI's power as a liberating structure and, because of the way they locate CI in radically countercultural extremes, also the factor that makes CI vulnerable to missteps by practitioners.

The epistemic principle locates CI's position on three of the Brooks and Watkins dimensions—political frame, approach to inquiry, and utility. With regard to the political frame, CI's epistemic principle dictates that CI's purpose is to benefit the co-inquirers. It is directed neither toward the performance of an organization nor toward any emancipatory purpose beyond the participants' development. The location is a likely cause of misstep by academicians and other change agents. Academicians think of research as an activity situated in a larger discourse; change agents in both organizations and communities tend to think of their intervention in terms of changing systems, not individual learning.

Kasl and Yorks (2002, p. 5) clarify the importance of distinguishing between organizational and personal change. In their example, a group of educational administrators hypothetically pose a traditional action research question, "How can we improve the way that teachers use technology in the classroom?" In contrast, the same group of administrators might formulate the question in a way more appropriate for CI: "How can we improve our ability as administrators to influence the way teachers use technology in the classroom?" Although the difference may seem minor, if taken seriously, it points to a radical distinction. The former question implies that the administrators are taking action on the system; the latter that the change they seek is in themselves. Because the inquirers are embedded in and are interactive with the system, changes in their personal meaning schemes can change the system, but the CI focus is on their own learning and development.

This distinction unfolded for a group of social activists (Kovari et al., 2005), who were part of the Leadership for a Changing World (LCW) project described later in this article. The topic that brought the group together was teaching people how to be more strategic, conceptual, and creative in their thinking. As the activists began their inquiry, they perceived their project to be developing more effective strategies for teaching their constituents. As the inquiry proceeded and they reflected deeply on their own experience, the activists came to realize that strategic, conceptual, and creative thinking is developed through personal inquiry that engages the learner. The change they should be seeking was change in their own attitudes that would bring about different ways of being in relationship with their constituents. These activists reframed their perceptions of how they carried out their work.

In reference to the dimension of difference discussed by Brooks and Watkins as approach to inquiry, co-inquirers use critical reflection rather than scientific method. This approach to meaning making is not countercultural, though the epistemic participatory principle itself is. Its extended epistemology insists that the most likely path to valid new knowledge or behavior is a robust application of all four ways of knowing, without overreliance on the kind of analytic thinking valorized in the larger culture.

The Brooks and Watkins dimension of utility locates CI, along with many other kinds of action research, in a position that is radically misaligned with usual academic assumptions about the nature of research. New knowledge is produced for local use, not for dissemination to an audience beyond the research site. In the specific case of CI, the research site is one small group of co-inquirers; thus, there is no intrinsic need

to share new knowledge with anyone outside the group. However, groups often want to share with others as a natural extension of their work (Group for Collaborative Inquiry & thINQ<sup>1</sup>, 1994; Kasl & Marsick, 1997). In our experience, forms of sharing are more likely to be actions that express the inquirers' newly acquired practical knowing than they are to be reports of the group's propositional conclusions.

The political participatory principle identified by Heron and Reason situates CI at the far extreme of the dimension that Brooks and Watkins call "power sharing." Other action research methodologies define distinctive roles for methodological experts, who are often members of the academy. In CI, the model defines participation as limited to a group of peers. On the occasion that a person outside the group is invited to facilitate the group, this situation, although valid, is a deviation from the essential form. In the more typical embodiment of the CI process, the project initiator provides expertise in method but generally aims to make an early transition to becoming a peer within a group of peers. Imagining that a group of peers should make all decisions for themselves is countercultural in the halls of academe, which typically presumes itself to be the repository of methodological expertise.

Heron and Reason (2008) describe cooperative inquiry as "a form of second-person action research in which all participants work together in an inquiry group as co-researchers and as co-subjects" (p. 366). Each person is a co-subject and co-researcher as the phases of the inquiry process are enacted. Although not imposing a particular orthodox set of methods, adherence to authentic co-inquiry is fundamental in CI, captured in the phrase "not research on people or about people, but research with people" (p. 366). However, the two core participatory principles that define the process are also the source of potential dis-ease in institutional settings.

### *Challenges to Inquiry Integrity When Situated in Institutional Setting*

The potential power of CI as a research or learning structure makes it attractive to formal institutions such as universities, foundations, or employers. In turn, the resources of institutions can enhance access for a larger and more diverse population of potential inquirers. The conundrum faced by the adult educator who wants to use CI is figuring out how to protect a process that is fundamentally averse to institutional influence while at the same time taking advantage of the institution's resources and accommodating its vested interests in the quality and outcome of the inquiry.

We examine three factors interjected by institutional affiliation that challenge the integrity of the CI process: financial support, power inequities, and reporting requirements. Financial support is not itself problematic but can exacerbate problems with power inequities and reporting requirements; institutions have the power to withhold resources unless they can influence the inquiry's topic and require some kind of reporting mechanism. Either circumstance violates the epistemic and political participatory principles that define the essence of CI. We analyze how these factors affect CI in three different contexts: inquiries used for dissertation research, inquiries in the workplace conducted for professional development, and multiple-inquiry projects sponsored by an institution to serve its mission.

## Inquiries Used for Dissertation Research

We begin by examining how institutional factors manifest as problematic in the context of dissertation research. Although these factors are also in play when CI is used for master's projects or course practicum assignments, we limit our case presentations to dissertation work. Representing the culminating project in the journey from candidate status, dissertations are held to a more robust and rigorous standard than are other academic papers. Hence, the stakes are higher and the distinctions between the epistemic and political values of CI and traditional academic culture are put into relief. Dissertations that inform our analysis are listed in Figure 1.

### *A Range of Topics, Purposes, and Outcomes*

We have divided the dissertations into three different groups to draw attention to the range of topics, purposes, and outcomes in CI projects. These divisions are arbitrary and not mutually exclusive.

*Transforming core identity.* In three cases, the inquiry was so closely associated with core identity of the participants that these CI projects led to striking examples of emancipatory learning. They include White people who raised their personal awareness about White privilege and learned to be more effective in acting for racial justice (Paxton, 2003); Jewish women activists who learned about their own internalized anti-Semitism and experimented with how to heal it (Rosenwasser, 2002, 2005); and community women diverse in race, education, and language who transformed their epistemic frames of reference (Smith, 1995, 2002). Before their inquiry, these volunteer peer counselors depended on and valorized expert knowledge; from their inquiry, they learned to value their personal capacities to construct actionable knowledge. They used their new knowledge not only to work more effectively as peer counselors (Smith, 1995) but also to develop their collective ability to teach others about diversity (Smith, 2002).

*Growth toward wholeness.* Other dissertations illustrate how CI helped participants develop more holistic ways of being. Although these five projects were undertaken initially in the context of professional roles, the inquirers quickly discovered a more holistic relevance for their inquiries that included their personal lives. The projects include women writers who learned how to confront their difficulties with writing about conflict (Gillam, 2003), professional administrators from a variety of for-profit and not-for-profit settings who learned how to lead holistically and create a more wholesome balance in work and personal life (Mankey, 2007), young women managers who learned to function more comfortably and effectively in a challenging corporate culture (McArdle, 2004), nursing managers who learned to be more holistic in their relationships with one another and with those they supervised (Van Stralen, 2002, 2003), and community college personnel who placed a high value on intuition and learned how to nurture it in themselves and others (Zelman, 1995, 2002).

Focus of Dissertation Topic by Primary Purpose and Intended Outcome	Author of Dissertation	CI is the Dissertation Research Method	Student in Role of Outside Facilitator and Partial Participant	CI Organized in Workplace Setting
<b>Core Identity</b>				
White People	Paxton			
Jewish Women	Rosenwasser	X		
Community Women	Smith		X	X (volunteer)
<b>Growth Toward Personal Wholeness</b>				
Writing Conflict	Gillam	X		
Learning Life Balance	Mankey	X		
Managing Challenge	McArdle		X	X
Learning to be Holistic In Relationships	Van Stralen		X	X
Nurturing Intuition	Zelman			X
<b>Enhancing Professional Skill</b>				
Improve Personal Practice as Teacher	Bray			X
Foster Teacher Comfort with Technology	Gerdau		X	X
Learn Non-hierarchical Facilitation	Sartor	X		
Improve Student Learning	Yorks			X
Understand Group Coherence	Zweig	X		

**Figure 1.** Summary of the Dissertations Studied Organized by Focus, Author, Primary Research Method, Participant Role, and Setting

*Developing professional skills.* These inquiries maintained a primary focus on professional skill development, although in each case, participants also experienced satisfying growth toward wholeness. The projects include high school teachers whose efforts to improve their practice led them to develop ways of strengthening the sense of community in their school (Bray, 1995), state-level technology educators who

developed their ability to help classroom teachers become comfortable with technology (Gerdau, 1995), organization development specialists who improved their capacities to use nonhierarchical methods for facilitating groups (Sartor, 1998), university teachers and administrators who experimented with improving student learning (Yorks, 1995), and a cross-disciplinary group of professionals who enhanced their understanding of how to manifest the energetic quality of group coherence (Zweig, 2007).

### *Observations About Money, Power, and Reports*

Among the 13 dissertations described in Figure 1, five are cases in which CI was the method used to carry out the research. This means that the principal investigator is the full CI group, not the doctoral candidate. These five case examples are marked in the third column of Figure 1 (Gillam, 2003; Mankey, 2007; Rosenwasser, 2005; Sartor, 1998; Zweig, 2007). When doctoral candidates use CI as a research method, they usher a Trojan horse into the academy.

*What's in the belly of the Trojan horse?* The two core participatory principles that embody the essential nature of CI are at odds with academic tradition. Confronting traditions that shape expectations about dissertation research requires constant interpretation and negotiation.

The fundamental hurdle is challenging countervailing assumptions about the purpose of research, which CI's epistemic principle situates firmly in personal experience. In CI, the reason for initiating an inquiry is to respond to a sense of "felt disquiet" in the initiator's personal experience; validity of outcome is marked by group members' development of new knowledge or skills expressed in personal practice. This view of inquiry purpose and the primacy of practical know-how contrasts with academic tradition, which is to conceptualize research as a contribution to a larger academic discourse.

From this epistemic principle come several system-challenging implications. First, there is no natural role for academic literature. Because the research problem is appropriately situated in the felt experience of the initiator and co-inquirers, there is no need to review a body of literature to demonstrate how the research is responsive to an issue or problem discerned in an established body of knowledge. Nor is there reason to relate the inquiry outcome to an ongoing discourse since the most important research outcome is participants' ability to take more skillful action based on knowledge created during the inquiry.

With CI as the research method, not only is there no intrinsic reason to report the results of the research to others, but as Heron (1996) points out, the most important results are not amenable to being reported in writing:

Skills are not reducible without remainder to any set of verbal statements reporting the skill. . . . At the core of any skill is a knack, an inner key to effective action. . . . You can describe a skill in words up to a point, but the inner core of

the action, the knack, defies verbal description. This is so whether the knack is to do with a physical, technical, emotional, interpersonal, managerial, transpersonal skill, their combinations, or any other kind of skill.

Having the knack is the essence of a skill: it is at the heart of knowing how. And at the heart of the knack is a knowing of the excellence of its doing, which is what makes it a knack. This is a criterion of practical validity which is intrinsic to action and which is ineffable. For each specific knack is beyond language and conceptual formulation. Knacks are things that you cannot fully report. They transcend all propositional utterance and take you into the autonomous sublimity of action. So any published paper descriptive of a skill or skills is going to be partial, an incomplete and ghostly cipher. (p. 111)

CI's political principle is similarly difficult for academic tradition. It dictates that inquirers make all decisions related to the inquiry. The researcher is the CI group, not the individual graduate student who initiates the inquiry for a dissertation. As a consequence, neither the research question nor its procedures can be described in advance of the group's formation and decision making. If the doctoral candidate is required to have prior approval from a dissertation committee or human subjects review group before proceeding with the research, some deft advocacy of processes outside academic norms will be in order. Perhaps most challenging will be the fact that any report about the group's new knowledge should be written by the principal investigator, which is the group as a whole, but only if the group has an interest in doing so.

*Engaging institutional requirements and academic tradition.* Doctoral candidates have created several strategies for protecting CI's integrity while meeting academic expectations.

Tackling the misfit with academic expectations about literature reviews, Penny Rosenwasser (2005) and Richanne Mankey (2007) embedded CI in a larger personal inquiry about the topic. The CI itself was situated in the project initiator's felt experience or sense of "personal disquiet," in accordance with CI's epistemic principle. Literature-based discussions of both the research topic and findings were conceptualized as the doctoral candidate's personal heuristic activity, in service of her curiosity as well as the academy's need that she demonstrate competence in engaging a body of literature. The final dissertation product clearly demarcates the CI group's research activity from the doctoral candidate's personal inquiry.

Addressing the academy's need for a written report, Linda Sartor (1998) and Joanna Zweig (2007) crafted innovations that are congruent with CI's political principle. The group in Sartor's dissertation created a model that summarized its new knowledge about the conditions, skills, and indicators of nonhierarchical facilitation. Creating the model was intrinsic to the inquiry because it served group members' desire to have a succinct reminder of what they had learned. Although the model served group members as a valuable summary of their experiential learning, it was too bare an outline to have much meaning for anyone outside the group. Not by any stretch would it be considered adequate as an academic product describing research findings. Sartor

copyrighted the model under the names of all the inquirers and included this copyrighted document as an appendix in her dissertation. For the dissertation's official findings chapters, she amplified each section of the model with illustrative examples she gleaned from transcripts of the group's meetings, thus bringing the group's abbreviated model to life phenomenologically for the reader of the dissertation report. Joanna Zweig (2007) obtained upfront commitment from participants to spend three months in inquiry and three more in writing results. At its own decision, the group eventually spent six months in inquiry and 18 months writing findings through a remarkable process of consensus writing that the group created after months of experimenting with strategies for being fully inclusive. These findings, under the names of all the inquirers, comprise a chapter in the final document. Zweig also created a chapter that she identified as her personal findings. Here, she theorizes about the significance of some group findings and reflects on how they relate to literature.

*Avoiding conflict with institutional requirements and academic tradition.* The remaining examples in Figure 1 represent a different strategy for using CI as part of the dissertation process. In these projects, the doctoral candidate was captivated by the CI process and invited others to explore a topic in which he or she was personally interested. However, the CI group's topic did not become the dissertation topic. Seven adult educators conducted case studies in which they analyzed how the CI process fosters adult learning (Bray, 1995; Gerdau, 1995; Paxton, 2003; Smith, 1995, 2002; Van Stralen, 2002, 2003; Yorks, 1995; Zelman, 1995, 2002). An eighth researcher focused her study on action research processes, including her personal process as a first-time action research facilitator (McArdle, 2004).

By designing a traditional case study in which the CI process becomes the topic, the doctoral student avoids conundrums created by CI's epistemic and political principles. With case study long established as a credible research method, no confrontation with academic tradition need be made. Nevertheless, the project will forge an uneasy relationship with the basic value espoused repeatedly by CI proponents, which is "research should be *with* people, not *on* them" (Bray et al., 2000; Heron, 1996; Heron & Reason, 2008; Reason, 1988, 1994). Students who opt for this strategy struggle as they confront the disjuncture between the participatory values that attracted them to CI and the traditional research behavior they enact when they re-cast CI participants into case study research subjects. This disjuncture can be somewhat mediated if the research report includes rich phenomenological descriptions of the participants' lived experience, the researcher's own experience, and active engagement with the participants on the emerging findings. Nevertheless, the disjuncture needs to be acknowledged explicitly, not only in the research report but, with somewhat more challenge, in the researcher's conscious awareness.

*Other issues.* With either strategy, the doctoral student must struggle with the way the context of dissertation research affects the inquirers. Making the transition from project initiator to full peer requires considerable finesse (Bray et al., 2000; Heron, 1996). These difficulties are exacerbated when the person attempting this transition is a doctoral student because group members tend to defer to what they perceive to be

doctoral-level expertise. In trying to avoid exerting undue influence, the student may overcompensate by self-censoring his or her participation. Negotiating this challenge requires that the doctoral student engage in what Torbert and Taylor (2008) describe as first-person inquiry, bringing moment-to-moment awareness to his or her experience as the group seeks to create the liberating learning space that is fostered by the peer status essential to CI.

Even when the dissertation student plays a role of outside facilitator (as in the cases marked in column 4 of Figure 1), the dissertation looms large as a force for distorting the political participatory principle that group members are fully in charge. In almost all cases, CI participants voice recurring concern: "Are you getting what you need for your dissertation?"

## **Inquiries Conducted in the Workplace for Professional Development**

We now turn our attention to the context of using CI for professional development in a workplace setting (marked in last column of Figure 1). Although these cases were also dissertation projects, they provide a window into what any adult educator should consider in this context. We describe two cases and summarize the others.

In the two cases, each CI initiator approached top decision makers in the organization to obtain support for inquiries construed as professional development projects that would take place during normal working hours. Suzanne Van Stralen was a system outsider who facilitated an inquiry for a group of nursing managers; John Bray was a system insider who eventually participated as a peer in an inquiry group of high school teachers.

### ***Nursing Managers***

Six nursing managers responsible for patient care services at an acute care hospital in northern California convened to ask, "How do we communicate in order to promote a culture of mutual respect and cohesiveness among management and staff from all departments, shifts, and facilities?" The group completed eight inquiry cycles, meeting bi-weekly for 4 hours. To initiate the project, organization development specialist Van Stralen (2002, 2003) obtained permission from hospital administration to attend staff meetings of nursing managers. She attended several meetings with different staff groups, describing the program to approximately 30 managers in order to recruit a group of six volunteers. Once recruited, the managers negotiated release time with their department heads. The group was free to decide what, if anything, it would share with others about its learning. This arrangement may seem unusual. Van Stralen (2002) explains:

Because the hospital had been cutting back on training for cost containment reasons, the administration was perhaps particularly open to providing the

nursing managers with access to this opportunity. Further, my previous work [as a consultant] within the system afforded me credibility, and I offered my services without compensation. (p. 14)

### *High School Teachers*

High school teachers in a rural upstate New York school district posed the question, "How can we improve our practice?" Project initiator and biology teacher John Bray had long been a passionate advocate for teachers' ability to take responsibility for their own professional development. He recently noted, "My belief is supported by the Glenn Commission (2000), which advocates in its report *Before It's Too Late* that teacher inquiry groups should be held as sacrosanct in teacher development!" (Bray, 2002, p. 83). Bray (1995) approached the school superintendent with a proposal that CI be used as an opportunity for faculty development; he negotiated release time so that participating teachers could meet all day once a month in a local conference facility. In addition to paying for substitute teachers and meeting space, the superintendent also provided a modest budget for books or other materials. During a meeting of teachers at the beginning of the academic year, Bray described the CI process and invited participation. Eight teachers volunteered.

### *Observations About Money, Power, and Reports*

To negotiate somewhat unusual arrangements with the institution, both initiators depended on personal credibility within the system as well as arguments that CI would pay off in significant learning and good will far exceeding the modest cost. Although Van Stralen and Bray were motivated by dissertations, any adult educator interested in professional development could follow their examples. Cost to the organizations in actual dollars was modest. Both employers provided release time. The school district also incurred costs of paying substitute teachers, renting off-site meeting space, and providing a small budget for books and other supplies.

In each case, the initiator secured agreement that there would be no requirements for reports or other outcome measures. Neither of the CI groups created written reports, but both were motivated to share their new knowledge in ways that demonstrate what Heron calls "the knack" of practical knowing. The nursing managers were so enthusiastic about learning to become holistic in their workplace relationships that they lobbied top administration for a hospital-wide employee appreciation day, which they planned and facilitated as a culminating action inspired by their inquiry. The high school teachers created actions for building community in the school and reported their achievements to the Board of Education through a letter the group wrote collaboratively. Another type of communication about their CI's outcome was the teachers' new knack for being in community. Their enthusiasm and dedication became so noticeable that other teachers began to ask if they too could participate in CI. The district-wide response to their requests is described later in this article.

Among the dissertations examined for this article, five others were conducted as workplace projects. Two took place in a higher education environment (Yorks, 1995; Zelman, 1995, 2002) and one in a State Department of Education (Gerdau, 1995). Participants in these inquiries had enough autonomy in scheduling their work time that the CI initiator did not think it necessary to solicit official support from top administrators, though one recruited a top administrator to join him as a co-initiator (Yorks, 1995). In the other two cases (McArdle, 2004; Smith, 1995, 2002), the inquiry initiator worked carefully with administrators, seeking their support and establishing parameters for the project. One of these projects took place in a large for-profit corporation (McArdle, 2004), the other in a volunteer context (Smith, 1995, 2002).

Regarding reports about their learning, participants generally followed the same pattern as the nursing managers and teachers. Enthusiastic about what they had learned, they created various events or actions to share their learning with the larger system. These events and actions demonstrated the practical know-how developed during their inquiries. Only in the corporation were participants required to share their experience, although no specification was made about the form this sharing would take. The young women managers created a participatory experience for senior women managers that provided a lived experience of what they had learned.

## **Multiple-Inquiry Projects Sponsored by an Institution to Serve Its Mission**

Organizations can devise projects that launch multiple inquiry groups as a strategy for serving an institutional mission. We describe three examples: a school district using CI to provide opportunity for professional development, an academic program providing students and community residents with opportunity for personal growth toward cultural competence, and a research center in an elite university that adopted CI as one option for accomplishing its research mission. We present these projects in order of their complexity, paying particular attention to two dimensions of complexity—personnel who acted as the institution's agent in support of the inquiries and systems interrelationships.

### *School District Offers CI as Opportunity for Professional Development*

The teachers, whose inquiry we described in the Professional Development section, became so visibly changed by their experience that other teachers clamored for the same opportunity.

*Personnel.* In a subsequent year, Bray coordinated a CI project in which five different groups formed, each developing its own inquiry question. Bray (2002) explains:

Our multiple-groups design raises numerous issues. Since I cannot be in every group, I choose a group with an inquiry question of interest to me just as any other member would. As project initiator, I am also concerned about assisting

other groups with the inquiry process. . . . I have avoided becoming overseer of the process. I am in frequent contact with the groups but exert no authority over them. . . .

From time to time our inquirers look to me, as the initiator of these groups, to resolve issues. When faced with questions outside of the group, I consistently bring them back to the group for discussion. (p. 88)

Teachers from the original project, who dispersed themselves as participants among the new groups, filled the personnel function of providing guidance in how to use the CI method.

*Systems interrelationships.* The district provided the same financial support. Although no formal reporting was required, the superintendent in this small rural community felt informed about the project's quality through informal interactions with teachers as he encountered them in his daily routine (Bray, 2002).

### *Academic Program Offers CI as Curriculum for Cultural Competence*

In service of its academic requirement that students demonstrate cultural competence, the Transformative Learning doctoral program at the California Institute of Integral Studies (CIIS) created an opportunity for White students to participate in CI groups for which the topic was designated by the program as White privilege (European-American Collaborative Challenging Whiteness, 2002). A daylong meeting oriented participants to how the CI method works and gave interested parties an opportunity to form groups. In accordance with CI's participatory principles, each group developed its own research question within the broad parameters of the designated topic.

Students had the option of registering for academic credit or using the project to fulfill the doctoral program's cultural competence requirement without registering and paying tuition. Groups were open to the community; several people participated who were students from other CIIS academic programs or community residents who had no affiliation with the school. The project lasted 3 years, fielding 15 different groups with an average size of 5 persons. Of the 70 participants, only 18 registered for academic credit. With one exception, groups met for the entire academic year, thus spanning two semesters.

*Personnel.* The Transformative Learning program hired an adjunct instructor to coordinate the project. As the program faculty perceived her to be both experienced with CI and skilled in living its participatory worldview, it gave her free rein to make decisions about how to implement the project. She created an infrastructure that honored group privacy and autonomy while also allowing her to track individual and group learning. The infrastructure included monthly reflection papers required from students receiving credit, an end-of-semester report from each group, private electronic conferences in which the coordinator could participate if invited by the group, and a steering committee comprising one representative from each group that met

monthly with the coordinator to keep her informed and to work collaboratively with her to make decisions. Through all these mechanisms, the coordinator was able to provide guidance in how to use the CI methodology.

*Systems Interrelationships.* Because so few of the participants registered for credit, the Transformative Learning program contracted with the registrar to prevent courses from being cancelled for low enrollment. Costs of the adjunct salary and online support services were absorbed by the program budget. The steering committee planned a culminating event in which groups shared their learning with each other as well as a larger academic community.

The White privilege CI project was part of a larger cultural consciousness project that was created in response to needs expressed by students of color. The larger project had two sections—one for white people and one for CIIS students and faculty of color. The people of color did not engage in cooperative inquiry but met regularly to explore how they could support each other in a predominantly White institution. For example, students of color expressed exhaustion at having constantly to “instruct” their White colleagues about micro-aggressions and their experiences in society. Because the two tracks of the cultural consciousness project were homogeneous by race, participants could inquire without the stress often found in cross-racial settings. Ironically, the project worked as long as it had low visibility in the larger system. When the president became concerned that the project was violating the law by offering a course segregated by race, the project was terminated.

### *University Research Center Uses CI to Further Its Research Agenda*

Our third example involves the Research Center for Leadership in Action (RCLA) at the Robert F. Wagner Graduate School of Public Service, New York University. This is the most complex example and demonstrates multiple tensions. We base our description on published reflection by members of the Center’s research staff (Ospina, Dodge, Foldy, & Hoffman-Pinella, 2008; Ospina et al., 2004) and our personal firsthand knowledge about the project (cf., Aprill et al., 2007; Kovari et al., 2005).

The Wagner School competed successfully to lead the research component of a Ford Foundation project—LCW. For five successive years, Ford Foundation selected a cohort of individuals from 17 to 20 social change organizations. The foundation supported each cohort for two years, bringing participants together for quarterly meetings that provided leadership development and networking activities. From 2001 through 2005, 165 individuals from 92 organizations were awarded LCW fellowships.

Before Ford launched LCW, it invited proposals for research that would distill new learning about emerging forms of grassroots leadership. In response to the RFP, Wagner staff created an action-oriented participatory research plan. Soon after winning the LCW project, the school institutionalized its participatory vision of research by establishing the RCLA, a center that eventually developed research relationships with many different leadership projects.

For the LCW project, the research design included three strands of methodology—narrative inquiry, ethnographic inquiry, and cooperative inquiry. LCW awardees were invited to collaborate with the academic researchers in documenting new thinking about grassroots leadership by choosing to participate in at least one of the research strands. We examine challenges faced in implementing cooperative inquiry as a research method. Among the most interesting challenges were those posed by group formation, divergence in purpose between LCW fellows and the RCLA research agenda, access to the CI groups' research findings, and provision of outside group facilitators.

*Challenges posed by group formation.* Forming groups posed an initial hurdle. At the awardees' first meeting of their two-year program, RCLA research staff described the three-strand research design and invited participation. A large proportion of the research budget was allocated to the CI strand, allowing for two CI groups per cohort, thus making the opportunity possible for a little more than half the LCW fellows. Some participants saw a chance to gain financial support for inquiring into an issue of strategic importance and joined the process readily. Others were less clear on the benefit but didn't want to let the opportunity slip away.

The circumstances deviate from the usual way for forming a CI group, in which an individual with an interest in a topic seeks others who share the interest. Although emergent conversations about topics sometimes led to the formation of a CI group, at other times awardees were more motivated by wanting to be with the other people who were joining a group. Tensions created by the general tendency of social activists to be distrustful of academic researchers manifested in many ways. Participants were sometimes alienated by the center staff's enthusiasm about the emancipatory nature of CI. As center staff experimented with how to facilitate group formation, their efforts were at times interpreted as subtle pressure to join a group or as a move toward controlling the topics around which groups would form.

*Challenges posed by divergence in purpose.* In our discussion of dissertation research, we described CI's epistemic principle as a Trojan horse loosed into the academy, bringing countervailing assumptions about the purpose of research. That same tension is at play here. From the LCW fellows' point of view, their purpose was to improve personal practice in relation to whatever topic guided their inquiry. In contrast, the RCLA investigators were trying to produce new knowledge about emerging forms of grassroots leadership for the purposes of disseminating it in a larger academic discourse and fulfilling the center's responsibility to be accountable to the funding organization.

The tension was exacerbated by these social activists' tendency toward being suspicious of academic researchers, who are often seen as part of the establishment. Initially, as is typically the case with social change organizations, the challenge was seen as meeting the obligations of the funding organization while remaining true to their own intentionality. The question of whether they (the participants) were "being studied" was a concern that gradually went away as trust was built up between the center staff and participants. For their part, the center staff had to learn new ways of engaging with

their various stakeholders and program participants with regard to research (Ospina et al., 2004). This was an ongoing effort as the program unfolded.

*Challenges posed by requiring access to group findings.* RCLA had accountability obligations to its larger academic institution as well as to the funding organization. As part of the CI organizing process, groups had to agree to provide an account of their experience in the form of a report and were encouraged to develop formal publications for the public arena. This too required learning over time by the research center staff, who had preconceptions about what such reports should include. The center staff came to recognize the value of reports generated from the perspective of the participants, although they were not always comfortable with the positions captured in the documents. Many of these reports describe how CI helped participants develop their own practice, while enabling personal transformations (see publications at the RCLA Web site: <http://wagner.nyu.edu/leadership/reports/>). In addition to being useful to the participants, the center has evidence that non-LCW participants have found the reports useful as well.

*Personnel.* RCLA retained facilitators experienced with CI and provided each inquiry group with two facilitators charged with helping groups use the CI process in a manner consistent with the epistemic and political mandates of the methodology. Over the course of the project, facilitators and RCLA staff identified and learned to negotiate several potential hazards created by the decision to place paid, outside facilitators in the CI groups. The facilitators' challenge was to function as subcontractors to RCLA while protecting the integrity of the CI groups. They needed to avoid interfering with the participants' control over the inquiry process, at times reinforcing this principle with center staff while remaining in a collegial relationship. Facilitators had to guard against becoming the carriers of concerns between center staff and the members of the inquiry group. Issues of coordination with center requirements had to be worked out directly between the center and the groups. One issue that required considerable finesse and sensitivity was the negotiation that took place between groups and their facilitators regarding how they would share responsibility for creating the required written reports.

*Systems interrelationships.* Both center staff and facilitators were part of a double layer of actors who were positioned at the fulcrum of systems with varying norms and expectations—the funder, the larger academic community as represented by both the Wagner School and the university, and the program participants. Committed to the values of participatory inquiry, the research staff found that it had wheeled a Trojan horse into the midst of the academy. Mirroring the situation we described earlier when we contrasted CI as dissertation research method to traditional case study, the center's commitment to participatory research “generated tensions and challenges that would have been absent had [we] followed a more traditional qualitative research path” (Ospina et al., 2008, p. 420). Even as it challenged academic norms, the staff often found itself besieged by tensions with the social activist participants, who sensed they had been re-created as research subjects. Caught in the middle, between the larger academic system and the activists, RCLA staff and the outside facilitators struggled to

bring into harmony “*control* over the research process, the *action* orientation of the research, and the voice represented in the *production* of knowledge” (p. 423). Both were committed to actualizing the process in a productive and educative way.

### *Observations About Money, Power, and Reports*

The multiple-inquiry projects represent the two perspectives that have contributed to the CI literature. RCLA uses CI as research methodology; the other projects illustrate CI as adult education—professional development for teachers and personal growth in understanding White privilege.

*Personnel.* Personnel who provided groups with expertise about the CI method and who served as the institution’s agent play a key role. In two cases, project coordinators found ways to track the CI groups’ process without personal presence in the groups. This circumstance was possible in part because group members had other sources of access to methodology expertise. Each teacher group included a former CI participant. In the White privilege project, there were two sources. The infrastructure created by the project coordinator allowed her to offer guidance to the groups, even though she was not present. Additionally, each group included some participants who understood CI’s worldview and had academic knowledge about its strategies because they were part of an academic program that emphasized collaboration and provided instruction in action research. In launching its project, RCLA could not draw on similar reservoirs of knowledge. In opting to provide knowledgeable paid outside facilitators, the center increased the likelihood that the groups would use the CI method appropriately, while also creating a number of incongruencies that required ongoing sensitivity and critical reflection.

*Systems interrelationships.* In the education projects, the sponsoring institutions relaxed some norms in order to accommodate project needs, such as the White privilege project’s arrangement with the registrar not to cancel courses for low registration. Neither institution required formal reports. Although the White privilege project coordinator created an infrastructure that included group reports, she perceived these reports to be one way she could be knowledgeable about the quality of the inquiries so that she could vouch for the process to the larger system. However, in keeping with the need for CI group autonomy, these reports were not distributed or shared in the larger system.

In all cases, the projects were advocated passionately from within the system—teachers themselves who wanted to experience CI after observing how their colleagues had benefited; the Transformative Learning doctoral program, with its strong commitment to both cultural consciousness and action research methodologies; and the RCLA staff, whose professional commitment to participatory research led them to search for ways to accommodate this worldview in a larger academic system where it was countercultural.

One potential hazard negotiated successfully by all three projects was that all offered CI as opportunity but not requirement. One of CI’s defining criteria is that it be voluntary.

Although accountability in the three projects manifests differently according to purpose—education or research—differences may also be associated with other factors. One is of scale. The school superintendent in this small rural community felt sufficiently informed through informal interactions with participants; the academic program invited the adjunct project coordinator to make periodic reports at faculty meetings. Differences in scale also include money. Neither the school district nor the academic program invested large amounts in its multiple-inquiry project. In contrast, RCLA allocated a large share of its research grant to providing travel, lodging, and paid facilitation to CI groups. Differences related to money also include the source. The school district and academic program exercised relative autonomy in evaluating their budget decisions; RCLA was answerable to an outside funding agent.

## Conclusion

Observations in this article are derived from our experiences as participants in inquiry groups and as adult educators who have supervised CI in various settings. Our experience leads us to be enthusiastic about the value of CI as both a research method and a vehicle for facilitating meaningful learning. The qualities of CI that factor into our enthusiasm, as well as cautions about potential shortcomings, are documented in many of the works cited here. However, those qualities and shortcomings are not the subject of this discussion.

Our experience alerts us to how the power of CI can be dissipated when its epistemic or political participatory principles are derailed. We strive here to share our insights so that educators and researchers who situate CI in an institutional setting can think proactively about how to protect CI's integrity, and thus its power. To give shape to our concluding reflection, we return to our discussion of CI's radical positioning on the dimensions of action research.

Although our analysis is directed to one form of action research that is uniquely and radically positioned on the dimensions identified by Brooks and Watkins, we believe that our assessment and recommendations may be helpful to practitioners who want to create institutional liaisons for other forms of action research or participatory pedagogies. Forms of action research that are positioned similarly to CI on the Brooks and Watkins dimensions will present challenges very like the ones described here.

The epistemic participatory principle dictates CI's position in the Brooks and Watkins dimensions of political framing and utility: CI is undertaken for the benefit of participants and need not produce knowledge beyond the participants' own use. When the inquiry purpose is framed as educational, these positions are more easily protected. However, when the inquiry is undertaken as research, as it is in our case examples of five dissertations and the RCLA leadership research, institutional norms directly counter CI's position on the dimension of utility and, by association, the epistemic participatory principle defined by Heron and Reason. Our hope is that practitioners who are forewarned about this possibility will unleash creative impulses, to experiment not only with some of the strategies reported here but with forms of accountability that are well beyond what is currently taken for granted by institutions.

The political participatory principle dictates CI's position in the Brooks and Watkins dimension of power sharing. CI's integrity demands that the group of peers makes all decisions about the project, whereas institutional interests will nearly always suggest some loss of autonomy. In the cases presented here, there are key players who protected CI's integrity by buffering the relationship between the inquiry group's autonomy and institutional stake. With dissertation research, the key player is the graduate student. In workplace inquiries, the responsible adult educator negotiates conditions and concessions from the larger system. In two of the multiple-inquiry projects, the key players straddled several systems. The White privilege project coordinator was accountable to the university for accrediting performance of students who registered for credit and to the academic program for the execution of the project in a way that honored CI's participatory values. RCLA staff and group facilitators broke new ground as they coped with competing pressures from several systems. Our observation is that all these roles were influenced significantly by the buffering persons' instincts about how to live participatory values—their “knack” for being collaborative and holistic. We are steeped in a culture that valorizes hierarchy; learning our way into a different way of sharing power requires continual support and critically reflective alertness.

We conclude by observing that the power of CI lies in the synergistic interaction between the two participatory principles. Learning from one's own direct encounter with experience can be most fully actualized when one has complete control over that encounter and the meaning-making processes that emanate from it. Any intrusion from outside forces that constrain or attempt to shape the process will erode the process and diminish the outcome. Despite our portentous assertion that institutional interests are outside forces that threaten CI's potential, we advocate that educators and researchers take advantage of institutional resources to make the opportunity for CI more widely available. Our intent in this article is to challenge practitioners to be creative in imagining new relationships to institutional accountability and courageous in buffering the competing needs of CI groups and the institutions that support them.

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### Bios

**Elizabeth Kasl** is an independent scholar and former faculty member in the Teachers College AEGIS program and the California Institute of Integral Studies Transformative Learning program, where she promoted participatory research and sponsored numerous CI projects.

**Lyle Yorks** is Associate Professor of Adult and Continuing Education in the Department of Organization and Leadership and Director of the Adult Education Intensive Study (AEGIS) doctoral program at Teachers College, Columbia University. His research interests include action learning, collaborative inquiry, learning transfer, and developing strategic mindsets for addressing the challenges of learning through complexity.

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